Room 1 round-up: chat and Q&A

Everything discussed and answered, in one place

Hosted by Cam St-Omer Donaldson
Room 1: Ask and Storytelling | Thursday 19 November 2026 | 12:00–16:00 GMT

Anonymous summary for attendees. Attendee names and details have been removed.

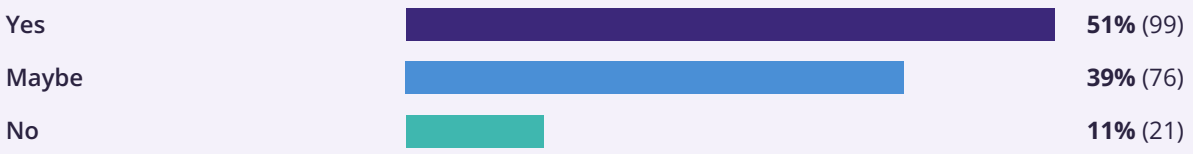
About this round-up

This is an anonymous round-up of the Room 1 chat and Q&A. It covers a community snapshot from the polls, the key actionable learnings and stats shared, the questions that were answered (live by speakers, or in the chat by speakers and fellow attendees), attendees' own takeaways, and the resources shared. Attendee names have been removed. Answers are paraphrased, so please check the recording for the full detail.

Community snapshot

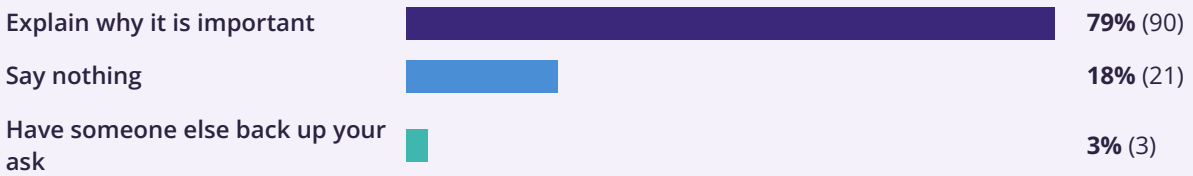
Throughout the afternoon, attendees answered polls from the speakers. In the word clouds, larger words were given by more people.

"Asking someone face-to-face for a donation scares me."



196 votes. Half the room said yes, and nearly nine in ten were at least unsure. Beth Upton noted that this is well above the one in four fundraisers who said so in Money Tree's own research.

What do you usually do straight after you make the ask?



114 votes. Most of us explain. Beth's advice was to say nothing at all.

What soft skill do you struggle the most with in your fundraising relationships?

confidence experience clear communication time

self-esteem capacity self-belief starting the conversation creativity resilience

starting the relationship impact

21 people responded. Confidence was by far the most common answer.

What stops people from saying yes to sharing their story?

privacy fear shame not being asked trust

embarrassment grief "I don't have a story" confidence fear of prejudice

time stigma too raw where it ends up trauma being judged dignity feeling exposed

unclear how it will be used

47 people responded. Privacy, fear and shame led, but "not being asked" came up too.

Key actionable learnings shared

Practical ideas from speakers that you can put into practice.

- **Run the checklist before you ask.** When, where, what for, how much and who. It won't stop your nerves, but it tells "not ready" nerves apart from "this matters" nerves. The checklist is in the delegate bag.
- **Say a number, ask a question, then stop.** One or two sentences, a specific amount and purpose, and no softening. Then stay silent: count to ten, and on a video call keep your face still.
- **On paper, silence is white space.** Put the amount in the first paragraph, use real (not rounded) budget numbers, make the ask a full stop rather than a plea, and never add "any amount would be welcome".
- **Offer choice when the price isn't set.** Three options teach you more about a donor than any handover note. And if someone says yes before you've finished, you probably asked for too little.
- **A soft no is a diary entry.** Thank them, then check which was wrong: the time, the amount, the project or the asker.
- **Head, heart and hand.** Make the supporter journey easy, make people feel something, and show them the impact of what they did. Treat the funnel as a continuous cycle, not a one-off campaign.
- **Start with what you already know.** Recognise supporters' history ("You've already helped raise £1,500") and segment by what people have done, not just how much they've raised.
- **Find the real words.** When a colleague shares a story, ask "Are those the real words they said?" Get curious, and keep a proper story pad to capture what you hear.
- **Trade stories on thank-you calls.** Ask new supporters why they gave, and share a real example of their impact.

- **Message first, then the person.** Decide what you need to say, then find the person whose story carries it authentically. Keep them in control from the first conversation to launch day, and go back to them if you want to use it somewhere new.
- **Look for seven voices.** Go beyond the CEO: beneficiaries, staff, volunteers and donors. Think of stories in clusters rather than one central star.
- **Call it a conversation, not an interview.** Share your own experience to give people permission, and when you send the draft back, ask whether it's true to how they feel, not whether the grammar is right.
- **Conflict is information.** Pause before you respond, name the real problem ("I see we have mismatched expectations"), choose the next useful action, and close the loop so you can keep working together.

Key stats shared

Figures quoted by speakers during Room 1. Please check the slides in the delegate bag for sources and full context.

85% of gifts came after somebody asked, in one large study. Being asked is one of eight drivers of giving identified in a review of more than 500 studies.
Beth Upton, Money Tree Fundraising

1 in 4 major donor fundraisers say asking face-to-face scares them, and about half once you include those who won't commit either way (Money Tree's Major Donor Scorecard, 201 charities).
Beth Upton, Money Tree Fundraising

22 of 50 philanthropists expected to meet the chief executive for an ask. 16 were happy with the fundraiser, and 9 wanted to meet the people doing the work.
Beth Upton, Money Tree Fundraising (from "Inside the Mind of a Philanthropist")

2x as likely: charities growing their income are twice as likely to use AI to cut admin time, and 85% of respondents back a human-led approach to AI.
Eden Brown and James Francis, Funraisin (Global State of Fundraising survey)

35% drop in early lottery cancellations after one fundraiser started asking new players why they joined, and sharing a real story of impact, on her thank-you calls.
Ben Swart, Bright Spot Fundraising

£75,000 a year for three years came from a trust application rewritten around a real story from service colleagues.
Ben Swart, Bright Spot Fundraising

2 years is the time limit The Saltways puts on consent for its films, before checking in again with the person.
Emma Bracegirdle, The Saltways

Questions and answers

Questions answered live by speakers, or in the chat by speakers and fellow attendees. Unanswered questions aren't included.

Making the Ask: A Practical Masterclass

12:10 | Beth Upton (Money Tree Fundraising)

Q: Where can I find "Inside the Mind of a Philanthropist"?

It isn't currently published, but Beth is considering running it as a webinar again.

Answered in the chat by Beth Upton

Q: Would you put the ask amount in the covering letter to a trust, even as the opening sentence?

Yes. Beth uses the covering letter as an executive summary of the core points.

Answered in the chat by Beth Upton

Q: After a first, significant unsolicited gift of £25,000, should I offer three options for their next gift when I follow up on how we used it?

Not in that follow-up. First make sure they know you valued their gift and used it as you said you would: they need to feel valued, not like a cash machine. When the time is right, explore three project areas to find what interests them most, and then an options ask can upgrade them within the project they care about.

Answered in the chat by Beth Upton

Authenticity Beats Perfection: A Human Touch To Build Trust In An AI World

12:45 | Eden Brown and James Francis (Funraisin)

Q: How can a team measure whether following this cycle is working?

Don't try to do everything at once. Pick one small new thing, such as a welcome-back email to past participants, and measure it end to end: did people open it, use the link and sign up? Track it early rather than waiting until the end of the campaign, and build on whatever data you already have, however much or little.

Asked by the host, answered live by Eden Brown and James Francis

Storytelling in Conversation: Not Just on the Page

13:30 | Ben Swart (Bright Spot Fundraising)

Q: Is there anything written down, or a podcast episode, about the Blood Cancer UK meetings?

Not on Blood Cancer UK yet, but Ben plans to interview them. Bright Spot's storytelling podcasts are linked in the delegate bag.

Answered live by Ben Swart

Q: Would you use these stories in written proposals, or only in donor meetings?

Both. It's easier in conversation, and you don't need to make a big moment of it: just say "the best way to sum that up is when I heard…". Writing works the same way. Ben shared a hospice trust application that swapped a generic request for a real family's story, and won £25,000 from a trust that hadn't given for three years.

Answered live by Ben Swart

Q: How do you gather real insights without overstepping, especially on emotive or sad subjects?

Ben often found the most powerful material came from the staff who work with people, such as counsellors and frontline colleagues, rather than from the families themselves. And if it isn't appropriate for the person, it isn't appropriate.

Answered live by Ben Swart

Supporting People To Tell Their Stories

14:05 | Emma Bracegirdle (The Saltways)

Q: Colleagues love celebrating success. How do we help them get comfortable showing the problem too?

In planning, ask "what could we do with an extra £20,000 a month?" Doing more of the work means telling the stories of the people we help, including the struggle and the role the charity played. Supporters need to believe the change happened because of you. The "fundraising versus comms" conflict shouldn't exist.

Answered live by Emma Bracegirdle

Q: We offer confidential therapeutic services to children and young people. How do we protect them in the "digital forever" age without losing immediacy?

Emma would avoid showing the person's full face. Even with fully informed consent, lives change, and content is very hard to remove once it's out there. There are creative ways to keep the emotional connection without it, and Emma has written a Fundraising Everywhere blog with examples.

Answered live by Emma Bracegirdle

Q: Any advice on managing consent going forward?

There isn't one perfect platform, so build it into the systems you already use. The Saltways has three consent forms: a standard one, one for adults consenting for children or people who can't consent, and an easy read version. Cover where content will be shown and for how long (they use two years), and they've just added a line about AI scraping. Keep a record of where each piece is used and a reminder to re-check, and give people a contact that won't disappear if a staff member leaves.

Answered live by Emma Bracegirdle

Writing That Actually Works

14:50 | Jen Love (Agents of Good)

Q: What if the person you're talking to isn't as forthcoming as you hoped?

People want to do a good job, so explain that sharing their story is a unique way only they can help the mission. Call it a conversation, not an interview, and share your own experience and emotion to give them permission. When you send the draft back, make clear you're checking it's true to how they feel, not checking the grammar. You'll get far fewer edits.

Asked by the host, answered live by Jen Love

Q: How do we convince senior people to give up their voice and hand over to beneficiaries and donors?

"We love you, boss, but there are more voices in this chorus than yours." A rounded conversation with supporters needs more perspectives, and the most important thing you can do with power is give it away. The boss is still needed for the big fundraising ask. Your organisation's own values often make the case for you.

Answered live by Jen Love

Navigating Difficult Conversations

15:25 | Genelle Aldred

Q: I'm a people pleaser. After I've de-escalated a conflict, the other person sometimes holds a grudge. Is that on them?

First ask yourself whether you're really over it, because niceness can gloss over the real issue. Then be direct: suggest a coffee, acknowledge it was a tough moment and own your part. After that, how they respond is up to them. Aim to be kind rather than nice.

Answered live by Genelle Aldred

Q: The pause has come up in so many sessions today. Why does it matter so much?

You don't have to have the answer straight away, and once something is said you can't take it back. Critique is hard in the moment, so sit with it and work out what is true, what is theirs and what is yours. Check how you feel first, then decide what you want to do. Those are two separate conversations.

Answered live by Genelle Aldred

Q: How do you stay patient with yourself when you react with frustration and the pause doesn't work?

You're human. Aim to respond reliably eight times out of ten, rather than perfectly. Notice the patterns: which people and situations trip you up? Give yourself both compassion and challenge, not endless amounts of either.

Answered live by Genelle Aldred

Q: What if a senior colleague asks why you did something, and the honest answer is "my manager told me to, even though I disagreed"?

Suggest getting together with your manager to talk through how the decision was made. That way you don't throw them under the bus, and you're still part of the conversation.

Answered in the chat by Genelle Aldred

Q: Any tips on the "clarify" step?

Talk about what you are both trying to achieve. Everyone needs to be clear about what you're actually disagreeing about, and that clarity alone often lessens the conflict.

Answered in the chat by Genelle Aldred

In attendees' own words

Anonymous takeaways shared in the chat, session polls and post-event feedback.

"The silence after the ask"
On Making the Ask: A Practical Masterclass

"A personal thank you is so underestimated"
On Authenticity Beats Perfection

"Get curious is a lightbulb moment for me"
On Storytelling in Conversation

"WOW what a powerful video"
On Supporting People To Tell Their Stories

"I love the humanness of what you've said, a nice reminder that life isn't perfect and we don't need to be either"
On Writing That Actually Works

"Conflict is information, not inherently negative. Important to take time to pause before engaging – allow yourself that time!"
On Navigating Difficult Conversations

Resources shared

- Slides for every session are in the delegate bag, along with extra resources from our partners.
- Beth Upton's ask checklist, a table of strengths and weaknesses of different askers, and a briefing outline are in the delegate bag. Money Tree's Major Donor Scorecard is still open if you want to assess your own major donor programme.
- Funraisin's guide and its Global State of Fundraising report: scan the QR code on their slides, or find them in the delegate bag.
- Bright Spot Fundraising's storytelling podcasts: the link and QR code are in Ben Swart's slides.
- The Saltways' Community Studio, an online course in filming and editing on your phone with consent forms included. The discount code is on Emma Bracegirdle's slides.
- Emma Bracegirdle's Fundraising Everywhere blog on telling stories without showing faces, and her storytelling masterclass in the members' on-demand library.
- Jen Love's story conversation questions are in the delegate bag, ready to copy and use.
- Genelle Aldred's book: *Communicate for Change: creating justice in a world of bias*.

Missed a session? The full recording of both rooms is available on demand now through your original joining link, and individual session recordings will be added early in the week of 23 November. You can watch until 19 December 2026. Fundraising Everywhere members also have every session in their on-demand library.