Making the Ask

Your guide to the masterclass. Beth Upton, Money Tree Fundraising.
The Art of Fundraising, 19 November 2026.

Ready. Spoken. Written. One structure, whether you are asking a person, a company or a trust.

1. Ready: the Asking Checklist

Question	The right…	Ask yourself
When?	**Right time**	Have they been thanked, and do they know what the last gift did? Are there any life events or milestones coming up? **Company:** when is the budget round? **Trust:** when is the deadline, and when do the trustees meet?
Where?	**Right place**	Where are they most comfortable? Let them choose. **Company:** their building, with the budget holder in the room. **Trust:** their form, their portal, their word limit. Your safety comes first: never go into a home alone.
What for?	**Right project**	Do they already know about it, and do they care about it? **Trust:** their published priorities, in their words. **Company:** what they are trying to achieve this year.
How much?	**Right amount**	Is the price set (a named room, a patron scheme, a grant range, a sponsorship package)? If not, a choice of levels is a valid option. Beware the instant yes: it means you asked for too little.
Who?	**Right asker** **Right home team** **Right donor team**	Who asks? Who goes with them? Who decides on their side? You do not have to guess. Ask. **Company:** who signs it off? **Trust:** who reads it first?

The checklist will not stop the nerves. It tells you that you are ready.

Who asks? Four options, none of them perfect

Asker	Strengths	Risks
Chair, trustee, chief executive or senior staff	A professional peer. Shows the donor how important they are to the organisation.	May not know the project as well as you (brief them). May not feel comfortable asking.
Peer donor	A strong ask: they can talk about why they give. Powerful if they are a known peer.	Their reasons may not be the prospect's. May put off someone who wants a starring role.
Celebrity	Can bring credibility to the campaign. Flattering.	May not be able to answer objections or questions.
Fundraiser	Knows the donor well. Can answer questions and objections. Can follow up and plan next steps.	Unlikely to be a peer. Unlikely to have given at a similar level.

Who do donors expect to meet? Of 50 philanthropists: 44% the chief executive, 32% the fundraiser, 18% the project staff. Source: Inside the Mind of a Philanthropist, Money Tree Fundraising.

Briefing whoever comes with you

1. Who and where	2. Background	3. Purpose	4. Afterwards
Donor name, meeting date and location, who is attending.	Brief bio, recent giving, other interests and boards, family notes.	Current stage, purpose of the meeting, talking points, who says what.	Follow-up actions, and who leads each one.

One page. Practise the ask out loud together. Never take the briefing into the meeting.

Money Tree Fundraising. Reproduce only with permission.

2. Spoken: the ask out loud

The four elements	Spoken	Written
Number	A specific one. Not a range, and never "a significant gift". A round number is fine.	In the first paragraph. Your share, and the whole cost. A real, costed budget.
Purpose	What the money does, in a form they can picture.	What your share pays for, in the funder's words and priorities.
Question	One that invites an answer.	A full stop. "We are asking the Trust for…"
Stop	Silence. No softening, no second ask.	White space. No paragraph explaining why it is not much.

Say it like this

Patron	*"I'd like to invite you to join us as a Firefly Patron, with a gift of £10,000 a year for three years."*
Lead donor	*"Would you consider being a lead donor, with a gift of £500,000?"*
Company	*"We are looking for one partner to fund our schools programme next year, at £45,000. How does that sit with next year's budget?"*

Then say nothing. Count to ten in your head. Keep your face still: no nodding, no leaning in, no encouraging smile. The silence gives them space to think and to answer the question you actually asked.

The three replies

Yes	Thank them. Agree how and when they will give, and what recognition they would like. Thank them again. Write it up the same day. For a larger gift, put it in writing.
No	Almost always a soft no: the time, the amount, the project or the asker was wrong. Say nothing for a few seconds. Then: *"Thank you, I appreciate your time. Could you tell me a little more about what you had in mind?"*
Let me think	Not a no. A diary entry. *"Thank you and of course, there is no pressure at all. What other information would help you decide?"* Agree when you will come back.

3. Written: the ask on paper

"We are asking the Trust for £23,000 towards the £61,243 cost of two family support workers in Kent over two years. The remaining £38,243 is already secured."
Two sentences, five things: your share, the whole cost, what it buys, how long for, and proof it will happen. Everything else is evidence.

Four ways to ruin it. Double asking: "…although a contribution of any size would be gratefully received." **Apologising:** a paragraph explaining why it is not much. **Vagueness:** "a significant contribution towards our costs." **Round numbers:** a budget of round numbers says you guessed.

When the answer is a letter, ask why. Thank them. Ask which was wrong: the time, the amount, the project or the fit. Ask whether they would welcome a resubmission.

4. Homework: make an ask

Who will I ask?		**How much?**	
What for?		**When and where?**	
Where?		**Who will be there?**	

Take the two-minute Major Donor Scorecard: majordonorscorecard.co.uk

Read the report, what 201 charities told us: majordonorscorecard.co.uk/2026-report