

securing major donors

An intensive one-day masterclass on how to identify, engage and retain high net worth individuals as major donors to your organisation.

For dates and locations please visit www.actionplanning.co.uk/majordonors

The event runs from 9.30am to 4pm.

Limited to 20 participants

This intensive and practical workshop is designed to assist those organisations which have yet to develop substantial major donor fundraising programmes and wish to do so. It will benefit all those in your organisation with responsibility for identifying, securing and retaining wealthy individuals as donors, including trustees, appeal chairs, fundraising directors and major donor fundraisers.

The course examines in detail how to prepare your organisation to launch a major donor programme, develop strategy, identify suitable high net worth individuals, obtain background information on their interests, develop a successful 'ask' and retain donors, building their commitment so that the size and frequency of their gifts increase.

Using a wide range of case studies and interactive group sessions, we look in detail at the motivations, aspirations and interests of both the established wealthy and the large numbers of 'new rich'. Participants will gain valuable insights into why donors give, how they choose the causes they support, and how fundraisers can tailor individual fundraising propositions which work. We hope it will give you and your team the information, the skills and the confidence to access this rapidly expanding source of charity funding.

The course is led by Virginia Fisher, Senior Consultant at Action Planning. During her career prior to joining Action Planning, Virginia supported a wide range of organisations to achieve successful major donor gifts and partnerships including Great Ormond Street Hospital, ICAN, University College Hospital and The Royal Veterinary College, University of London. Much of her current client portfolio retains her expertise in this area to help realise their Major Donor campaign targets.

"I found myself **really energised** by this course. It is exemplary." *Jennifer Barraclough, Director, Woodbrooke Quaker Study Centre*

"I found the course **inspiring, engaging, educational**, thoroughly enjoyable and informative" *Eselde Imms, Development Officer, Royal Geographical Society*

"Extremely useful, **well explained**, approachable trainer with extensive knowledge and information" *Nathalie Bell, Major Gift Fundraising Assistant, Zoological Society of London*

"**Very useful course** - I think it will help boost our income immeasurably" *Sabita Banerji, Communications & Marketing Officer, Cecily's Fund*



action planning
let's start from here

strategy and fundraising consultants

REGISTRATION FORM

You can book in four ways:

1. Enter your details online at www.actionplanning.co.uk/majordonors (you will then have a choice of either requesting an invoice, or paying online)
2. or email anne@actionplanning.co.uk
3. or fax (020 8770 2090) or post this form to **Action Planning**, Waymark House, 19 Cedar Road, Sutton, Surrey SM2 5DA
4. or phone Anne on 0208 661 8060

Please register the following delegates (**BLOCK CAPITALS PLEASE**)

1 Mr/Mrs/Miss/Dr: _____ First Name: _____
Last Name: _____
Position: _____
E-mail: _____

Mr/Mrs/Miss/Dr: _____ First Name: _____
Last Name: _____
Position: _____
E-mail: _____

2 Name of Charity/Organisation: _____
Address: _____

Postcode: _____
Tel: _____

3 Please indicate your preferred workshop date below:

4 Please tick appropriate box:
 I enclose my cheque for _____ (payable to Action Planning)

Attendance fee: £182 per delegate, including VAT, lunch and all presentation materials.

Please register me/us and send me a VAT invoice. (Unless you specify otherwise, the invoice will be made out to your organisation).

I wish to pay by credit card (complete details below)

Visa Mastercard Switch/Maestro Delta

Card Number

_____|_____|_____|_____|_____|_____|_____|_____|_____|_____|_____|_____|

Valid from _____ Expiry Date _____

Issue No. _____ Security Code _____

Switch/Maestro users only

This is the 3 or 4 digit code on the back of your card

5 Please indicate any special needs or dietary requirements:

6 Please tick the relevant box if you would like a free discussion with Action Planning about our services in any of the following fields:

Major Donor Fundraising Research (e.g. into major donors or trusts) Revenue Fundraising
 Recruitment Strategic Consultancy Market Research
 Capital Fundraising Wealth Screening
(Please write below how much you need to raise and for what purpose) _____
to identify potential major donors

DATA PROTECTION

We would like to retain your address to send you invitations to future events and information on our work. Should you not wish to receive such communications, please tick here.

We would like to include your name, title and organisation (but not your address) on the delegate list. Should you not wish us to do this, please tick here.

CANCELLATION AND REFUND POLICY

All delegate fees must be paid in advance of the conference. Your fee is fully refundable, provided you cancel in writing more than seven working days before the conference. No refunds are available for cancellations within seven working days of the event, though substitutions can be made at any time.

PROGRAMME

Action Planning reserves the right to vary the published programme of speakers and the timing of the sessions.

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Securing Major Donors

Major donor fundraising has grown rapidly as a source of charities' income over recent years. This practical, 'hands on' one-day workshop is designed to help more organisations to benefit from this trend. The programme includes:

- an introduction to major donor fundraising
- guidance on how to identify and profile potential major donors amongst your supporters, and secure new names of rich people potentially sympathetic to your cause
- group exercises on how to analyse major donor motivations and plan an effective approach
- advice on how to achieve organisational readiness
- extensive training and practice on making an effective ask, with constructive feedback from the trainer and the group
- a briefing on the leading UK philanthropists
- advice on how to sustain major donor relationships, and build their emotional and financial commitment to your organisation
- interactive group work and practice on donor care techniques

The course is presented by Virginia Fisher, Senior Consultant at Action Planning.

Action Planning

Action Planning is a leading UK consultancy to the not-for-profit sector. It offers an unparalleled combination of fundraising and strategic consultancy, research, recruitment and 'hands on' fundraising to help organisations grow their income and fund major capital projects.

An initial discussion with Action Planning about your needs is without charge. Please call Vicky Porritt on 020 8642 4122 or email vporritt@actionplanning.co.uk