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GOLDBERG  
CONSULTING

# MAJOR DONOR COURSE

FOR FUNDRAISERS IN JEWISH CHARITIES

A UNIQUE, PRACTICAL AND INTENSIVE COURSE OVER THREE DAYS

THURSDAY'S 7TH, 14TH & 21ST JULY 2022  
10.00AM – 4.00PM

AVENUE HOUSE, FINCHLEY, N3  
WITH SOCIAL DISTANCING AND OTHER  
HEALTH & SAFETY CONSIDERATIONS IN PLACE

# MAJOR DONOR COURSE



## AVENUE HOUSE, FINCHLEY N3

**I am really excited to be offering again a unique Major Donor Course for Fundraisers in the Jewish community. The course is aimed at those who wish to develop skills to work with Major Donors.**

This course is limited to 8 participants and runs for three weeks, one day a week from 10.00am – 4.00pm. The venue is the spacious Drawing Room at Avenue House in Finchley, a well ventilated and large room. We have put in place social distancing, room cleaning and considerations for entrance and exits, toilets and individualised portions of drinks and snacks (more information on last page).

Major Donors are the life blood of all Jewish charities. Even more so now, as charities grapple with the challenges of income generation and search for lead major donors for on-line matched giving campaigns, major donor fundraising will be critical. Finding the right people and bringing them on board continues to be a challenge.

This three-day hands-on course will cover the key principles of major donor fundraising, teach the skills needed to bring in new major donors and give you the confidence to ask for a major gift yourself. There is also an opportunity to meet and interview a Major Donor.

Thank you and I look forward to welcoming you on the course.

David Goldberg

# “WHAT THEY SAID ABOUT THE MAJOR DONOR COURSE”



**Debbie Sheldon**  
former Chief Executive  
Work Avenue

The course gave me lots of information in a practical and engaging way and has left me with a feeling of being excited to implement what I have learnt. David is an excellent trainer who has a wealth of knowledge and encourages all the participants in an encouraging and meaningful way.



**Cassie Mattus**  
CEO  
March of The Living UK

The course was a fantastic way to explore the ask. David gave us a very clear structure and approach. The chance to rehearse an ask and see different responses from donors was a beneficial experience. I definitely feel more confident in approaching donors.



**Dan Rickman**  
Chief Executive  
ORT UK

Going through the course with a group of peers, calms the fears that you are not alone, we all face similar challenges and David, with his years of experience and personal anecdotes – plays the perfect Sat Nav to help us go through the journey and hopefully help us reach our chosen destination.



**Martin Segal**  
UK Executive Director  
Israel Guide Dog Centre

David Goldberg's Major Donor Fundraising course was one of the best things I ever did as a Director of a small charity. His insights and knowledge of the Jewish charity sector gained from over 10 years working in senior positions were valuable ones which have helped me on my way to growing and expanding my operations within the charity. David presents this course in a managed and methodical manner and you finish this course both knowing far more than when you started and maybe, more importantly, extremely motivated to go out and put his theories to practice.



**Gillian Merron**  
former Chief Executive  
Board of Deputies

Highly practical, relevant and realistic - the course presents the best ideal opportunity to step away from the day-to-day to focus on fundraising in a way that makes a difference



**Daliah Mehdi**  
Chief Executive  
Youth Aliyah

This course changed the way I think and speak about my charity. The insight I have gained has given me more confidence to approach and engage major donors.

# THURSDAY 7TH JULY SESSION 1



## COVID 19 and beyond

How has the COVID 19 pandemic effected Major Donor Fundraising in the medium and long term? What can are the challenges we face in the coming months?

## Working in partnership with Trustees

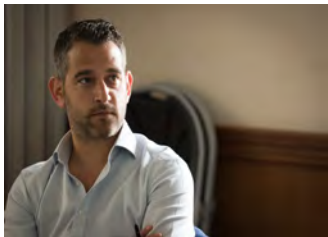
Working in partnership with Trustees and volunteers as askers and door openers is key to the success of a Major Donor programme. We will discuss some of the issues that come up and look at models of best practice.

## Why do people give?

Understanding what makes people give is crucial for any charity which wants to connect with a donor. In the Jewish charitable sector there may be other specific reasons and we will explore and understand the motivations of donors.

## The Major Donor Cycle

This session will start to explore how you reach a new Major Donor. Using the Major Donor Cycle model, we will set out the steps you need to go through to bring your next Major Donor on board.



## Identifying your next Major Donor

We will start by learning how to identify your next Major Donor, whether it's mining your own database, flicking through the Rich List or looking through the pages of City AM.

## Researching

We will research your next potential Major Donor and show you where to find valuable information. What motivates and engages them and how to find out if they would be interested in your charity?

## The importance of Stories: My Story

An opportunity to share your story and explore common themes.

# THURSDAY 14TH JULY – SESSION 2



## Preparation for Major Donor Interview

We will prepare for our Major Donor interview putting some questions together. What motivates them to give? Does they give strategically? What switches them off and what switches them on?

## Major Donor Encounter – Q&A

We will hear from a well known major donor about their involvement with philanthropy. We will have an opportunity to hear their story and ask him the questions that we devised.

## The Donor Story

We will explore the story of your next Major Donor, their values, their interests and what motivates them to give.

## Cultivating Major Donors

What are the diverse types of events and activities you should be investing in to attract new Major Donors and keep them on board? Who does the inviting? How frequently should these events be taking place?



## Planning and preparing the Ask

We will have plenty of time to plan and prepare the ask to the Major Donor. Using a checklist, we will work on what we will need to prioritise, based on the research we did last week.

## Setting up the meeting

Setting up the meeting is as challenging as making the ask itself. We will explore creating opportunities to set up a meeting. How do you get through to the person you need to speak to? Who makes the call? How do you start the conversation? Where should the meeting take place? Who else should be involved?

# THURSDAY 21ST JULY- SESSION 3



## **The Charity's Story**

We will tell the story of our own charity: who we are, what we do, who we support, what our values are and what our core message is.

## **Learning how to ask for a Major Gift – The Theory**

Using a “use of self” technique, we will walk through – minute by minute – how to construct and effectively use the time we have with a donor: how to evaluate the environment, listen to the donor, what language to use and how to make a powerful ask for a major gift donation.

## **Learning how to ask for a Major Gift – The Practice**

Everyone will have an opportunity to perfect their asking skills through a real time/real scenario role play. This will be an opportunity to practise and learn how to make the ask effectively with the help of video and feedback.



## **Thanking, Recognition and Stewardship process**

How can we thank Major Donors appropriately? How often should we be in touch with Major Donors after they have given their gift? We will be discussing some good models of thanking, recognising and stewarding donors and ensuring that they continue to support our charity.

## **Summary and what we have learned**

We will summarise what we have learned and draw together the models that we have looked at and their practical application. We will have an opportunity to devise a Major Donor work plan for our return to work tomorrow. This course includes a 1½ hour personal follow-up session with each participant, focusing on helping with their work plan.

## FEES

£850 + VAT for all three sessions. **What is included:**

- Course instruction
- Materials including summary slides after each session
- One hour follow-up one-to-one personal mentoring consultation
- Kosher lunch (individualised portions) at all 3 sessions
- Individualised refreshments and snacks throughout the day

## HOW TO APPLY

Please complete the Booking Form which can be found at [www.goldbergconsulting.co.uk/booking-form](http://www.goldbergconsulting.co.uk/booking-form)

Places are limited to 8 participants and will be allocated on a first come first served basis. A place will only be confirmed on receipt of full payment.

Applications and full payments should be received by **Monday 27th June 2022**

## CANCELLATION POLICY

If you cancel 30 days or more before the first day of the course, you receive a full refund.

If you cancel 15 – 29 days before the first day, you receive a refund of 50%.

If you cancel 1 – 14 days before the first day, we will not be able to give a refund.

## PAYMENT

Payment is due at the same time as the Booking Form is sent.

Payment should be made by bank transfer to:

Account name	<b>GOLDBERG CONSULTING</b>
Sort Code	<b>20-45-45</b>
Account Number	<b>23365042</b>

## THANK YOU

And I look forward to welcoming you on the course.



# ABOUT DAVID GOLDBERG



**I have been privileged to be a fundraiser in the Jewish community for the past 15 years. It has been a rewarding and satisfying part of my career, nurturing and leading a team of fundraisers whose efforts raised more than £130 million and whose work has impacted and improved the lives of tens of thousands of people.**

I have met many inspirational people along the way – fundraisers, donors and recipients – who have fuelled my enthusiasm for the profession and made me see fundraising as a positive, valuable and meaningful occupation.

Throughout my 40 years working in the Jewish community, I have developed many relationships and gained a multitude of experiences that have helped me understand how the Jewish community operates, adapts and changes. I understand the needs of organisations and in particular the Jewish charity sector. Many years as Fundraising Director for UJIA have given me a real advantage, having developed skills and knowledge in an outstanding professional environment.

Over the past 3 years, more than 100 fundraisers have come through my courses and are continuing to develop their skills, most importantly, have raised hundreds of thousands of pounds more from major donors since attending the course.

As well as training fundraising professionals, my consulting services include recruiting fundraisers into charities, mentoring Chief Executives and Fundraising Directors, advising on fundraising strategy and fundraising training for Trustees.

Please visit [WWW.GOLDBERGCONSULTING.CO.UK](http://WWW.GOLDBERGCONSULTING.CO.UK) for more information.