

# Beyond the ask: Building donor relationships that last



## The Learning & Impact Series

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# Morgan Stanley

# Our **pro bono** services

**Cranfield Trust services are delivered free of charge to frontline voluntary organisations, thanks to the support of our funders, donors and volunteers**



## **Management Consultancy**

Advice to address organisation challenges and help charities achieve their goals.



## **On Call**

Fast & effective specialist telephone support to help troubleshoot particular issues.



## **Peer to Peer**

Small, facilitated groups for charity leaders to support collaboration and problem solving.



## **Mentoring**

Providing an opportunity for charity leaders to discuss any issues in their roles.



## **Resource Library**

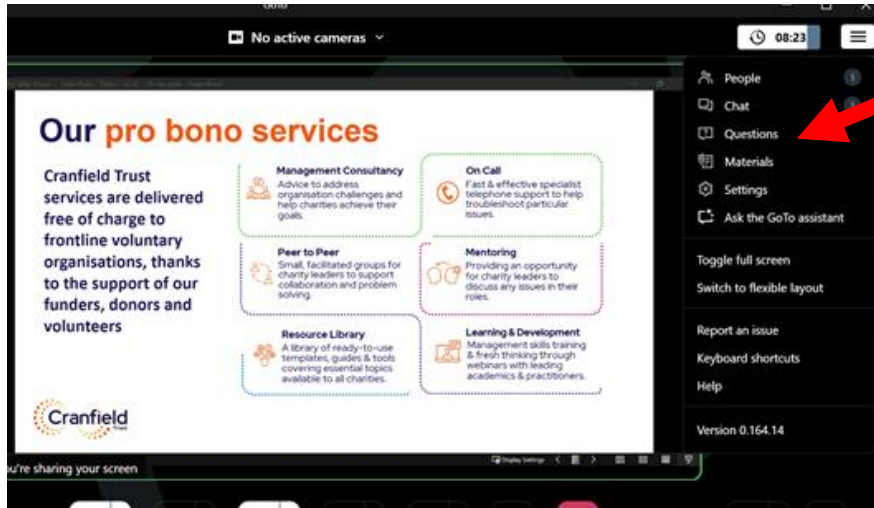
A library of ready-to-use templates, guides & tools covering essential topics available to all charities.



## **Learning & Development**

Management skills training & fresh thinking through webinars with leading academics & practitioners.

## Webinar housekeeping



- Please use the question box to ask questions
- Everyone is muted during this webinar
- Recording and slides will be shared



# Beyond the ask: building donor relationships that last

By Claire Heath

# Agenda

- Scene setting and framing
- Shifting the fundraising mindset
- Donor Relationship Cycle
- Why is donor stewardship so important?
- What donors actually want
- Practical stewardship tips
- Common pitfalls to avoid

# About Claire Heath



- 20+ years Charity Sector experience
- Health and welfare charities
- Local, National and International organisations
- Chartered Institute of Fundraising qualified
- Previously Trustee for a youth charity
- Specialist in corporate, grants, major donor and legacy fundraising
- Incorporated Claire Heath Consulting Ltd in 2024 to support small to medium charities with their fundraising challenges.



# Setting the scene

- Key principles of donor stewardship
- Charities come in many shapes and sizes
- Donors also come in many shapes and sizes
- Fundraising may not be your main role



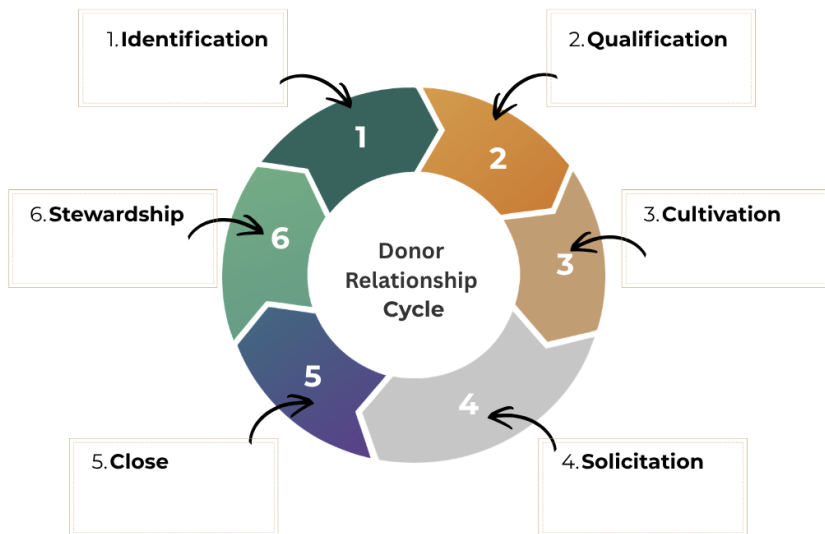
# Shifting the fundraising mindset

- **Stop** thinking of fundraising as asking for money.
- **Start** thinking of building long lasting relationships with people and organisations that care about your mission.

**Transactional** relationships → **Transformational** partnerships



# Donor Relationship Cycle



A lot of time and effort goes into stages 1-5

- Many charities **over-invest** in **the ask**
- Many charities **under-invest** in **stewardship**

# Why is donor stewardship so important?



Stewardship helps us to **retain** donors, not just **acquire** them.

Retention stops the bucket leaking!

# More than just retention

Retention = sustainable income

## Repeat donors:

- Give more over time – lifetime value
- Are easier to engage with
- Are more likely to upgrade their support

## Strong relationships lead to:

- Regular giving
- Advocacy

# The cost of losing donors

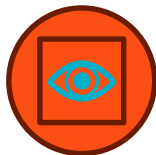
\*Hint: it's more than just missing one gift

- Future income
- Trust and goodwill
- Potential long-term support
- Replacing them takes:
  - Time
  - Energy
  - Money

# What donors actually want



To feel  
their gift  
**matters**



To see  
**impact**



To be  
**respect**  
**ed**



To feel  
**trusted**



To be part  
of  
something  
**meaningful**

This means we need to:

- **Thank** well
- Demonstrate **impact**
- Show **recognition**
- Create **belonging**
- Build **trust**
- **Ask** thoughtfully

# Practical Stewardship Tips

## Individual Giving



- Personal thank you within 48 hours
- Named contact person
- 2–3 impact updates per year
- Occasional non-ask touchpoints

### **Mistakes to avoid:**

- Only contacting when you need money
- Generic receipts only

# Practical Stewardship Tips

## Major Donors



### **Focus:**

- Access
- Involvement
- Personalisation

### **Tactics:**

- Invite to see work firsthand
- Tailored impact reports
- Involve them in problem-solving
- Ask their advice (carefully and genuinely)

Remember –  
HNW donors  
invest in  
leadership  
confidence.

# Practical Stewardship Tips

## Corporate Partnerships



### **What they care about:**

- Alignment with values
- Staff engagement
- Visibility
- Outcomes

### **Stewardship ideas:**

- Share impact stories they can use internally
- Offer volunteering opportunities
- Provide simple reporting dashboards
- Highlight employee engagement impact



# Practical Stewardship Tips

## Trusts & Foundations



### They value:

- Clear reporting
- Evidence of impact
- Transparency about challenges
- Professional communication

Critical point:  
Reporting is  
stewardship,  
not compliance.

### Best practice:

- Report early and well
- Share learning, not just success
- Maintain contact between applications

# Systems that make stewardship **sustainable**



- Simple donor tracking (even spreadsheet-based)
- Contact reports
- Annual communication plans
- Assigning relationship ownership

# Systems that make stewardship sustainable



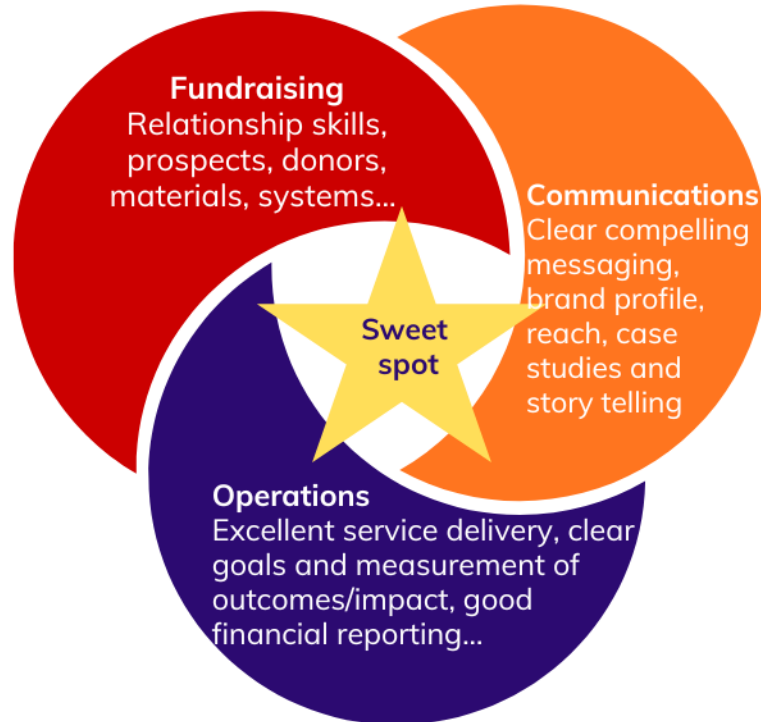
Introduce a simple tool: **The 3×3 Rule**

Ensure that each key donor receives:

- 3 meaningful touchpoints
- Which do not ask for money
- Before the next ask

# Remember:

## Fundraising is a team effort





# Common **pitfalls** for small charities

- Founder dependency
- Inconsistent communication - or only communicating when in crisis!
- Chasing short cuts and quick wins – not enough emphasis on long term
- Forgetting small donors
- Treating Trusts as ATMs

# The second donation is more important than the first



- The first donation is a taster
- The second donation is validation

# Closing thoughts

- Think about being one of your own donors
  - would you feel valued?
  - would you give again?



Questions?





Thank you to Claire for delivering such a fantastic webinar.

The recording will be emailed to you all by the end of next week.

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**T: 01794 830338 (voicemail)**

**W: [cranfieldtrust.org](http://cranfieldtrust.org)**

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- Management consultancy
- Mentoring programme
- Resources and useful signposting
- Facilitated Peer to Peer Exchanges
- Cranfield Trust On Call
- Online webinar library and resources