Creating a Transformational Case for Support
Transform your fundraising, transform the world.

“A picture paints a thousand words.”

Creating a Transformational Case for Support
Setting the context

General Motors Banks on Detroit Kids
$27.1M to Back United Way High School Program
"A case for support is not so much about what your organization does. A case for support is mostly about your promise, the promise you make to the world through your mission, your accomplishments and your plans."

Tom Ahern, Author and Nonprofit Communications Expert

Creating a Case for Support

Developing a Case for Support

Consider the Following Questions:
1. What does your organization promise?
2. What will be different in your community, state, the nation or our world?
3. Why is your solution worthy, proven, effective or unique?
4. Why is now so urgent?
5. Why do you need my (donor) support?
6. How will you convey emotion in the case for support?

Developing Your Case for Support

YOUR PROMISE:

YOUR STORY:

YOUR MARKET:

YOUR FUNDS:

WHY ME (DONOR)?
Developing a Case for Support

1. WHAT DOES YOUR ORGANIZATION PROMISE?

“Good is the enemy of great.”
Jim Collins, Author

Good to Great - Jim Collins
Creating a Transformational Case for Support

Big Hairy Audacious Goal

BHAG defined:
- Action-oriented
  - Clear (who, what, where, by when)
  - Compelling and gripping - people "get it" right away
  - Bold; bordering on hubris and the unattainable
  - Ten to twenty-year timeline to deliver
2. What will be different in your community, state, our nation or the world because of your organization?

3. Why is your organization’s solution worthy, proven, effective or unique?

4. What’s so urgent? Why now?
Developing a Case for Support

5. WHY DO YOU NEED ME?

6. HOW WILL YOU MOVE AND INSPIRE ME?

Developing Your Case for Support

YOUR PROMISE:

<table>
<thead>
<tr>
<th>WHY YOU?</th>
<th>WHY NOW?</th>
<th>WHY ME (DONOR)?</th>
</tr>
</thead>
<tbody>
<tr>
<td>IMPACT STRATEGY #1</td>
<td>IMPACT STRATEGY #2</td>
<td>IMPACT STRATEGY #3</td>
</tr>
</tbody>
</table>
Example Animal Welfare Case for Support

**YOUR PROMISE:**

<table>
<thead>
<tr>
<th>Board?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes?</td>
</tr>
</tbody>
</table>

**WHY ME? (DONOR)?:**

**IMPACT STRATEGY #1**

**WHY YOU?:**

**WHY NOW?**

**IMPACT STRATEGY #2**

**IMPACT STRATEGY #3**

**IMPACT STRATEGY #4**

Transformational Case for Support Insights:

1. Create a Compelling Promise and Solve Community Problems through Philanthropy
2. Display your Promise and Measurable Community Impact Strategies in 1-Page
3. Align Cultivation, Investment and Stewardship Opportunities with your Case for Support

About Tammy Zonker

Tammy Zonker was recently named among America’s Top 25 Fundraising Experts. She’s an envelope-pushing fundraising practitioner, an inspiring international speaker, and a powerful trainer in the discipline of transformational fundraising. In the past decade she has coached, trained and led nonprofit teams to raise more than $400M including a single gift of $27.1M.

She moved to Detroit in 2008 with a calling to fundraise in the most challenging economy in the U.S. and has turned those experiences into strategies, tools and processes for creating transformational fundraising results in any economy. When she’s not speaking at conferences or fundraising, she’s leading webinars, e-courses, private workshops and retreats through her company - Fundraising Transformed or hosting an episode of ZTV on her Vimeo fundraising channel.
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BONUS: Developing Your Case for Support

YOUR PROMISE:

WHY NOW?

WHY ME (DONOR)?

BONUS: Developing Impact Strategies

Consider the Following Questions:

• How does this strategy align with our promise?
• Does this strategy leverage our hedgehog?
• Are we measuring an outcome versus an output?
• How will we track and report progress?
• ‘By When’ will we deliver on this strategy?
• Is this Impact Strategy both a stretch and attainable?
BONUS: Hedgehog Concept

Three Circles of the Hedgehog Concept

What you are deeply passionate about
What you can be the best in the world at
What drives your economic engine

BONUS: Developing a Major Donor Investment Menu

“...so that they could feel that they could do anything, but not so much that they could do nothing.”

—Warren Buffett, Billionaire Philanthropist
BONUS: Developing a Major Donor Investment Menu

- What new initiative(s) must you launch to deliver your promise?
- What existing initiative(s) must be scaled to deliver your promise?
- Are your growth plans qualitative, quantitative or both?
- Which program(s) consume the majority of your unrestricted operating funds?
- How could you package these opportunities into a menu of investment opportunities?

Sample Major Donor Investment Menu

Below are some examples of what your investment will make possible:

- $5,796,000 will increase high school graduation rates for boys and gender of two-semester schools for two years.
- $2,035,000 will fund two year’s annual operating costs for two early learning center programs helping children enter kindergarten ready to learn.
- $2,035,000 will provide local school to 350,000 low-income children for two years.
- $100,000 will fund the operating costs of implementing our Early Developmental Instrument (EDI) in 100 kindergarten classrooms to increase attentiveness and generate reliable data to inform early learning Community strategies.
- $50,000 will provide reading exercises to increase parent and child engagement in one 100 parent-child neighborhoods for one year balanced with therapy-rich home environments.
- $50,000 will support one neighborhood early learning Community hub in one site and support child care providers in one 50 development hub practices for one year.
- $100,000 will launch a reading library in one neighborhood early learning Community hub.

BONUS: Developing a Cultivation “Moves” Menu

<table>
<thead>
<tr>
<th>Standard Moves</th>
<th>Custom Moves</th>
<th>Transformational Moves</th>
</tr>
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<tbody>
<tr>
<td>Raising broad awareness of mission, vision and resulting community impact.</td>
<td>Aligning engagement with the donor/prospective donor’s specific area of interest; providing access to behind the scene or inner circle experiences; increasing learning and dialogue.</td>
<td>Providing a life-changing, hands-on experience in the donor’s preferred mission area of your work.</td>
</tr>
<tr>
<td>Examples: “Ask, Ask, Ask!” or “Cultivate” or “Springboard your message; Event Mail; Website links, Personal Notes.”</td>
<td>Examples: “Join us for an event… or a…” “Join the Advisory Board…”</td>
<td>Examples: “Meet a child, providing us with the...” “Joining the Scholarship, Writing on the...” “In the end, a life changing experience”</td>
</tr>
</tbody>
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BONUS: Donor Cultivation Plans

• Is this cultivation move aligned with the donor’s/corporation’s area of interest?
• Are we being strategic in the level of move we’re selecting?
• What will the donor know or feel as a result of this cultivation move?
• What more do we want to know about this donor through this move?
• Who is the best person to invite, engage and/or accompany the donor?
• What (if any) issues might this donor have with us?
• What’s our desired next move with this donor?

Securing Transformational Gifts

“The space between being donor-centered and mission-focused is where the successful ‘ask’ occurs.”

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