

BLUE TOOLKIT

BRAIN DUMP → BUILD → TEST

1. Simplify MESSAGE
2. Clarify FUNDING RATIONALE
3. Design PRESENTATION/STORY

BRAIN DUMP

1. What is our Raison d'être?

2. CAUSE:

Write down the big CAUSE (WHY) words.

e.g. Save Lives, Change Education, Freedom

3. Communicate WHAT YOU DO on a napkin.



BRAIN DUMP

4. What gets you really fired up in the morning?

About your org/cause/program?

5. If you had only five minutes with a prospect what must you communicate about your impact?

Most important headlines or impact points.

BRAIN DUMP

6. What sells?

7. Identify ENGAGING elements for possible inclusion to presentation.
e.g. Maps, Visuals, Timelines, Quotes

8. What funding objections have you heard?

What big questions need to be addressed with the STORY?

BRAIN DUMP

9. Where does the money go? (Brain dump for priorities)

*Eventually we will be simplifying this to only three priorities/buckets.h
(e.g. Research, Education, Service)*

NOTES:

BUILD: **BLUE BOX**



“The Blue Box” – At 30,000’

The highest and simplest expression of WHY you do what you do. (PURPOSE)

“The Blue Box” represents the starting point for everything and frames the conversation at the highest level.

Action: Draw upon Questions 1-3 from Brain Dump

- To synthesize.
- Focus on the ‘WHY’ more than the ‘WHAT’. (‘WHAT’ must be addressed in the presentation but not always in the Blue Box.)
- Not about prose. It’s about simplicity.
- Goal is to articulate and highlight the highest frame.
- Use trigger list on next page.

BUILD: BLUE BOX TRIGGER LIST

We **change communities** by providing the **opportunity** for **every student** to go to **college**.

To provide the finest liberal arts education in the country.

Ending Homelessness.

We help girls navigate the roadmap of life.

Restoring our community by **transforming education**.

Changing the lives of the visually impaired worldwide.

We spotlight issues that explore the Church in the World.

Transforming the **aging experience**.

Breaking the circle of poverty by **changing the system**.

Transforming culture through a classical Christian education.

Building a Monastery.

Transforming Columbus: Inspiring the entrepreneurs of the future.

Strong Healthy Kids,
Strong Healthy Families,
Strong Healthy Communities.

We provide the opportunity for disadvantaged women and children to transform their lives.


STORYLINES

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Storylines

A storyline is an additional framing device. Choose up to three storylines that give the message and the organization context.

- Pull storylines from Questions 4–7 from Brain Dump.
- Circle 10 of your strongest bullet points (import below).
- Use the Trigger List on the next page to come up with 3 BIG STORYLINES.

_____		1.

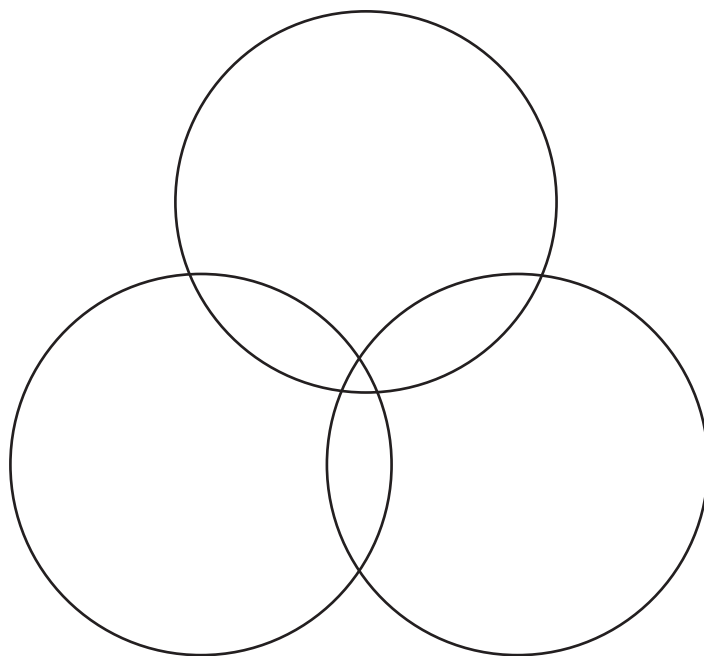
_____		2.

_____		3.

STORYLINE EXAMPLES

- **By the #'s** (Context / Size / Scope)
- **Partnerships** (Ex. Establishing Credibility and Collaboration.)
- **Founder's Story** (Could be used to tell the WHY / WHAT)
- **Vision**
- **[Image of Map]** (Depicting reach / size / scope of services)
- **History**
 - Timeline
 - Chapters (Often a great way to frame up 'this next chapter' or to leverage history)
- **Leverage** [in funding model] (Often great way to address 'Aren't you already funded by gov't?')
- **Track Record**
- **Problem / Solution**
- **Reputation** (ex. "We are rated #1 in the country")

BUILD: PRIORITIES



Simplifying/Clarifying

- Addresses WHERE the money goes.
- Simplifies our programs and funding needs using the Rule of 3.
- Does not have to be represented by three circles.

Action:

Use the trigger list on the following page to help you group your answers to question #9

- One or two words per circle
- Think: **BLUE IMPACT** (Not: 'Staff salaries', fund-raising, 'operations')

PRIORITIES TRIGGER LIST

People Programs Places

Training
Services
Disaster Relief

Impact Kids
Grow Biztown
Accelerate Urban School Initiatives

Students
Teachers
Campus

Homes/Shelter
Education
Counseling & Support

Advise
Scholarships
Financial Literacy Programs

Research
Education
Service

Catholic Education
Catholic Charities
Ecclesiastical Ministry

Editorial Expansion
Special Web Initiatives
Marketing & Outreach

Family
Community
Earth

Students
Faculty
Campus

Educational Experience
Student Life
Financial Stability

Homes
Care
Support

Prevention Access
Crisis Response
Housing/Transition

Meals
Home Health &
Wellness Programs

Research
Education
Advocacy

Community
Curriculum
Program Delivery Experts

Career Planning
Coaching
Supervisor Training

Kids
Programs
Places

Youth Services
Career Development
Community Engagement

Students
Teachers
Learning Experience

Homes
Education
Healthy Families

R&D
Publishing
Delivery & Training

BUILD FUNDING RATIONALE: **MATH**

DO the Math. KNOW the Math. OWN the Math .

- Have a \$ Goal:
- Over what time period:
- Frame it:
 - A Person, A Family, A Unit of Impact. (i.e., One village/One year)
 - A Project or Program.
 - A Plan.

Program Name	Summer Camp
Program Revenue	\$10,000
Program Expense	\$14,000
Total # Impacted	200 Kids

Make a Simple Plan: (Examples)

Note: You only need one plan:

- One benefactor... (To underwrite project)
- Plan via unit of impact
- Plan to Fund Goal (for larger projects)

\$5 Million

1 @ \$1M
2 @ \$500K
4 @ \$250K
10 @ \$100K
20 @ \$50K

Goal: 500 Villages Sponsored

1 @ 100 Villages
2 @ 50 Villages
4 @ 25 Villages
10 @ 10 Villages
20 @ 5 Villages

BUILDING FUNDING PLAN: **MATH**

ForImpact

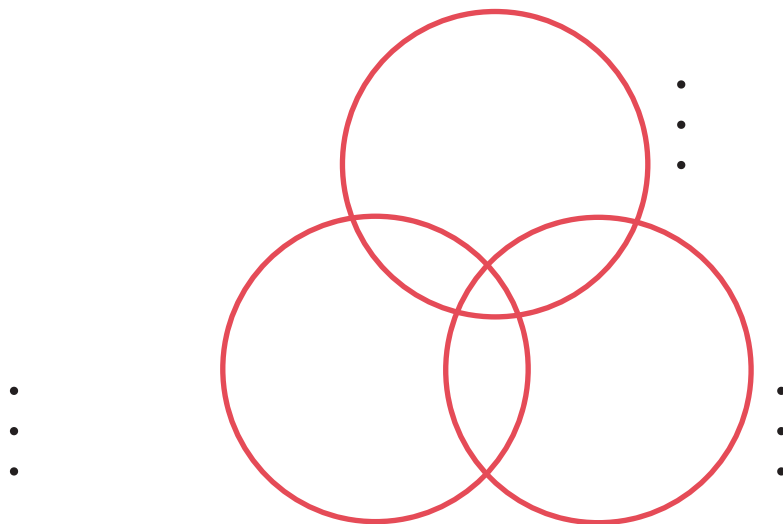
ENGAGEMENT TOOL TEMPLATE

(Organization Logo)

(Tagline)

PURPOSE:

PRIORITIES:



PLAN:

HOW YOU CAN HELP:

1. CHAMPION...

Our CAUSE/CASE.

2. INVITE...

Others to ENGAGE.

3. INVEST...

With a COMMENSURATE
COMMITMENT.

TODAY

Join...

Fund...

TOMORROW

Invest In...



FOREVER

Leave
A
Legacy...

ForImpact

ENGAGEMENT TOOL TEMPLATE

(Organization)
(Tagline)

EXPLANATION

PURPOSE:

BLUE BOX = MESSAGE!

Clear
Concise
Compelling

STORY

STORY

STORY

3 Powerful STORY-LINES!

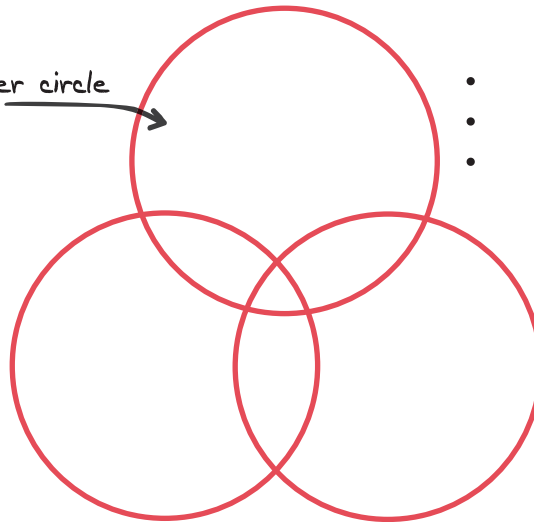
* Permission To Proceed

PRIORITIES: 3 Circles, -
1 or 2 words per circle

Where funds will
be used...
with 3 examples each of
projects/programs to
be funded.



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•
•



*On Back:
Map,
Pictures,
VISUAL
ENGAGEMENT!

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•
•

* Permission To Proceed

PLAN:

HOW YOU CAN HELP:

1. CHAMPION...

Our CAUSE/CASE.

2. INVITE...

Others to ENGAGE.

3. INVEST...

With a COMMENSURATE
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TODAY

Join...

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FOREVER

Leave
A
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The 'Triple Ask'!!!

