

BRAKELEY

A BRAKELEY MASTERCLASS

# Convincing Donors with Impact

A masterclass for fundraisers on Theory of Change and the Probe ·

Match · Confirm · Close conversation

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WARSAW  
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# Programme

Convincing Donors with Impact · one-day masterclass

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**9:30** Introductions & motivations

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**10:00** **Part 1 · Impact & Theory of Change**

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**11:30** Coffee break

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**11:45** **Part 1 · ToC canvas + Case for Support**

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**13:15** Lunch

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**14:00** **Part 2 · The role of the fundraiser**

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**15:00** **Part 2 · Probe Match Confirm Close**

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**15:30** Coffee break

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**15:45** **Part 2 · Role play**

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**16:45** Closing remarks & take-aways

PART 1

# Impact & Theory of Change



- 01 What is impact — and why does it matter?
- 02 Theory of Change — a logic of causation
- 03 Your organisation's ToC canvas
- 04 From Theory of Change to Case for Support

# Your Theory of Change in one sentence

Use the cards you found at your seat to jot down your organisation's ToC in one sentence — answering the questions you see in light print.

Work quietly · 5 minutes

**I work**

*for / at what organisation, in what context?*

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**To help**

*who? who is affected by the problem?*

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**By**

*doing what? what are your core activities?*

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**In order to**

*achieve what outcome or change?*

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**Because**

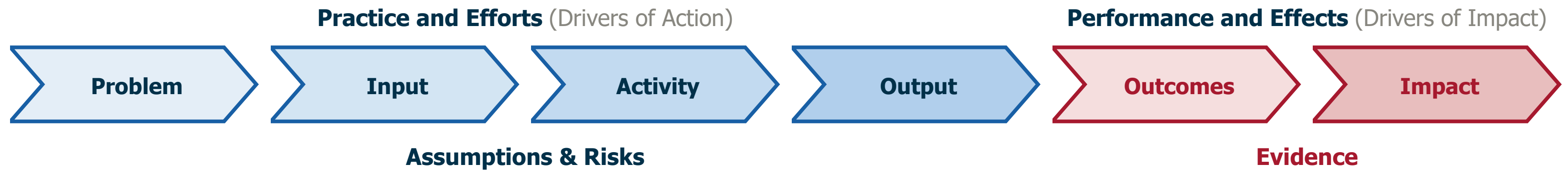
*what problem persists, and why does it matter?*

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**One sentence. If it ends at what you do, push it through to what changes.**

# © **What is impact — and why does it matter?**

# © What is impact — and why does it matter?



*"Most donors do not give because of what an organisation does. They give because of what changes as a result."*

# What is a Theory of Change?

A Theory of Change explains how and why a set of activities will lead to the change you seek. It is not a delivery plan — it is a logic of causation.

## Problem definition

A precise description of the problem, who is affected, and why it persists.

## Assumptions

What must be true for the logic to hold? Name them — they are your risk register.

## Causal logic

Spell out the chain of cause and effect — each activity, the change it leads to, and why that change follows. Every link is argued, not assumed.

## Evidence

What data, stories, or external verification support the claim at each step?

**A ToC that ends at outputs is not a Theory of Change — it is a delivery plan.**

## Exercise — your organisation's ToC canvas

Work individually (15 min) — then share and receive feedback from the group (5 min each).

<p><b>Problem / need</b></p> <p>Who is affected, and why does the problem persist?</p>	<p><b>Inputs</b></p> <p>Staff, money, expertise, volunteers, facilities</p>	<p><b>Activities</b></p> <p>What do you actually do? Which programmes or services?</p>
<p><b>Outputs</b></p> <p>Number of people reached, workshops held, publications — what is produced</p>	<p><b>Outcomes</b></p> <p>What changes for individuals? Skills, behaviour, access — over what timeframe?</p>	<p><b>Impact / long-term change</b></p> <p>What is the world you are helping to create? What systemic change do you contribute to?</p>

It is fine to leave gaps — the gaps are data. They show what you still need to learn before the donor conversation.

# From Theory of Change to Case for Support

The Case for Support translates your ToC into a compelling narrative. It answers five questions:

- 1 What problem are we solving — and why does it matter now?
- 2 Why are we the organisation best placed to solve it?
- 3 What is our approach — and why does it work?
- 4 What has already changed because of our work?
- 5 **What will your gift make possible? — this is the ask**

The fifth question is the ask. It only works if the first four have been answered convincingly.

**Exercise (15 min): Draft your Case for Support using your ToC canvas as the source.**

PART 2

# Funders and Fundraisers



- 01 The role of the fundraiser
- 02 Probe · Match · Confirm · Close · Values
- 03 Role play — shifting from projects to the whole organisation

## A PARADIGM SHIFT

# The fundraiser as impact facilitator

### OLD MODEL

Persuade the donor to give to *your* cause. You are the expert; they are the cheque-writer. Success = gift received.

### For the donor

Greater clarity on where their money creates real change. Deeper trust. Long-term relationship over transactional giving.

### NEW MODEL

Help the donor achieve *their* impact goals — through your organisation. You are a trusted guide to their philanthropy.

### For the organisation

Donors who understand impact give more, give unrestricted, and give again. A strong ToC is what makes facilitation possible.

# 🔒 From restricted projects to unrestricted support

Restriction is a symptom of low trust. Two levers change that.

## Why donors restrict

They don't yet trust the *whole* organisation — only a visible slice of it.

They haven't been invited to see the bigger picture — they were sold a project.

Control is a defence, not a preference. Remove the need to defend, and it dissolves.

## Lever 1 — the Theory of Change

- Shows exactly how the whole mission creates the change they care about
- Replaces vague trust with transparent logic — a map, not a leap of faith
- Makes restricted giving feel unnecessarily narrow

## Lever 2 — the fundraiser as facilitator

- Sits on the donor's side of the table — helping them achieve *their* impact goals
- Turns the conversation from persuasion to shared ownership
- When the donor feels truly understood, control becomes unnecessary

**Together: a donor who believes in your mission and trusts your judgment has no reason to restrict.**

# ⓘ Transparency as a trust multiplier

Two dimensions — both matter equally.

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## Seeing the bigger picture

Donors who only know one programme cannot give to the whole mission. Transparency about the full Theory of Change — all the way from problem to long-term change — lets them grasp what their gift is truly part of.

- Share the logic, not just the activity
- Show how each programme connects to the mission
- Invite them into the whole story — not just the chapter you are fundraising for

## Honest about where you stand

Donors are sophisticated. A highlights-only conversation signals insecurity. Sharing challenges — what you have learned, what you are still working out — signals confidence and builds deeper trust.

- Name what you do not yet know how to measure
- Share what you have adjusted after learning something failed
- Frame gaps as learning — not weakness

**A donor who has seen the full picture — including the rough edges — trusts more than one who has only seen the pitch.**

## A PARADIGM SHIFT

# Redefining donor-centric

From orbiting the donor — to inviting them into your mission.

### • OLD DONOR-CENTRIC

#### Orbit the donor. Bend over backwards.

- The donor is the centre of gravity; the organisation adapts around their preferences
- Goal: secure the gift — on whatever terms they set
- Tactics: stewardship theatre, bespoke reporting, naming opportunities, flattery
- Risk: mission drift, restricted giving, dependency, donor fatigue

*"We will do whatever it takes to get the gift."*

### • NEW DONOR-CENTRIC

#### Invite them in. Facilitate their impact.

- The mission is the centre of gravity; the donor is welcomed as a co-owner of the change
- Goal: help the donor achieve *their* impact goals — through your work
- Tactics: Theory of Change transparency, Probe·Match·Confirm, shared ownership
- Result: deeper commitment, larger unrestricted gifts, long-term partnership

*"We will help you create the change you believe in."*

# **The Probe Match Confirm Close method**

A structured approach to major donor conversations — designed to surface donor motivation and match it to your organisation's mission.

- P Probe**  
Ask open questions. What change does the donor want to see? What motivated past giving? What values drive them? Listen — do not pitch.
- C Confirm**  
Check back. 'Does this resonate with what you described?' Agreement here builds the foundation for a gift.
- M Match**  
Connect what you heard to your mission and ToC. Be specific — not 'we care about this too', but 'here is exactly how our work creates that change'.
- C Close**  
Move to the gift as a natural next step — the logical conclusion of a shared understanding, not a pivot to a different conversation.

**V Values**  
The foundation of every step. Surface the donor's core values first — they shape what you probe for, how you match, and what gift you invite.

This conversation may unfold across two or three meetings — not always in one sitting.



# Role play — shifting from projects to the whole organisation

In pairs: one fundraiser, one donor. Rotate after 12 minutes. Then debrief as a group.

**A**

## The loyal programme donor

Has given to the same restricted programme for three years. Task: surface what the donor truly cares about — then invite a broader conversation.

**B**

## The impact-sceptical donor

Pushes back: 'How do I know this actually makes a difference?' Task: probe for their definition of impact — then match your evidence to that criterion.

**C**

## The over-directed major donor

Wants a named building or a specific project only. Task: honour the legacy impulse — and expand the conversation to the mission behind it.

Debrief question: What question unlocked the conversation?

## KEY TAKE-AWAYS

- 01 Impact is change — not the activities that create it
- 02 A Theory of Change that ends at outputs is a delivery plan
- 03 Donors restrict because they lack a view of the whole mission
- 04 Probe first. Match precisely. Confirm before you close.
- 05 The goal is a gift to the mission — unrestricted by nature**

*"What are you taking away with you today?"*