

# From Surviving to Thriving: How a Compelling Case for Support can Take Your Charity to the Next Level

When it is said that the case for support is the most important document an organisation can have, it is a surprise how many charities simply do not have one. A vital fundraising tool, it should be at the heart of your fundraising programme alongside your strategy and planning documents.

An effective case for support has the ability to engage with your donors more intimately and motivate potential supporters to get behind your cause. Donors will understand your mission better, the work you do and your vision to make a positive change.

## What is a Case for Support?

A messaging strategy. An explanation as to why people should support you. A story. A document at the centre of your fundraising plan.

A case for support is all of these things.

A truly compelling case statement is one that has a mixture of facts and emotion that both inspires and persuades.

Your case for support should tell donors about your past, present and future. It should tell donors about your vision and dreams. It should inspire your donors to join you by making a donation. International fundraising expert Tom Ahern expressed it well when he said, 'A great case statement stirs the soul. The hairs on your neck rise. Abraham Lincoln's Gettysburg Address is a great case statement.'

## Importance of a Case for Support

No matter how long your charity has been around, or even if you're quite new, you will need a case for support to tell your story and encourage supporters to give. In fact, even if you have one, if it was written a few years ago, chances are it can probably be revisited so it is more relevant to what you do now.

Your case for support is a vital tool to have prospective donors understand the 'what' and 'why' of your organisation. If this isn't understood properly you can miss out on your donors making that important

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connection with your cause. It's this connection that you can then strengthen through ongoing donor engagement and stewardship.

## Different Formats of a Case for Support

Depending on who you are talking to, the format of a case for support can change from anything between a simple one-page overview to a more detailed prospectus designed and presented professionally.

You should first develop an internal case; a compilation of all the information that paints the picture of your organisation. In its simplest form, this should be a document of about 5 – 10 pages. It is the internal case that we will detail throughout this article.

There is also the external case, which can be prepared using various parts of the internal case in a brochure, leaflet or more styled format, to 'sell your story' to the philanthropic community, whether private donors, businesses, trusts or foundations.

## Components of a Case for Support

There are a number of elements that need to come together to make your case for support, most of which are detailed below:

- **Organisation Overview:** Provide a brief, but clear, description of your organisation in 50 – 100 words.
- **Mission, Vision, Values:** Give insight into what type of an organisation you are and what you stand for.
- **Organisational History:** Your credibility often stems from your history and the overall stability of your organisation. Be sure to include any outstanding achievements you have had.
- **Objectives:** Along with your vision statement, your objectives help share the direction you are heading.
- **Governance:** An organisation is little without strong and sound board members and management. In this section it is good to include a brief bio on each of your key people.
- **The Issue You Face:** Describe the challenge in the community that you hope to overcome. Be sure to use statistics and facts to substantiate your claims.
- **How You Will Resolve the Issue:** Explain the programmes and services you offer and exactly how they will address the issue you outlined earlier. Tell people how the work you are doing is making



a difference. Provide a case study or testimonials. Make it as real as possible.

- **Beneficiaries:** This is possibly the most important part; who is your charity actually helping? Sometimes including both the primary and secondary beneficiaries is a good idea.

## Tell your organisation's story in the most compelling and inspiring way possible.

- **Expected Outcomes:** What benefits do you anticipate as a result of providing your programmes and services? Be specific here.
  - **Evaluation:** How will you be able to prove that what you are doing is having an impact?
  - **Budget:** Itemise the projected expenses for your organisation and programmes. Whenever possible demonstrate the funding sources you anticipate. That way, potential supporters will know there is an overall plan for obtaining the remainder of the funds if they do decide to invest.
- In preparing your case, don't forget that your organisation has a lot of valuable intellectual property in its people. Utilise these resources; interview board members, a few select long-term donors or even volunteers.

### Writing a Compelling and Inspiring Case

Now that you have gathered all the components of your case, bring them together to tell your organisation's story in the most compelling and inspiring way possible. As Ken Burnett said in his book *Zen of Fundraising*, 'Open hearts and minds first, then wallets.'

Here are a few tips to remember when it comes to doing this. If writing is not your strong point, this is where you should really hand over to someone else (whether internal or external to your organisation).

- **Writing is a Solo Act:** Whilst it's great to get insights from others, your case needs to ultimately be written by one person, not a committee; otherwise it can become tedious and frustrating.
- **Be Concise and Clear:** While you need to provide detail about what you are doing, you need to do so with clarity and brevity. Don't say in 500 words what you could have said in 300.
- **Language:** Your case needs to be persuasive so use present tense and emotive words. Use simple language; avoid jargon and be aware of acronyms. You want your case to ooze passion.
- **It's all About Making a Difference:** Emphasise the social outcomes, or benefits, your organisation produces. This is the heart of what you need to convey in your case. While what you are actually doing is important, it's what happens as a result of your work that is

going to make people sit up and take notice.

- **Write, Edit and Rewrite:** Look at the first draft as an information dump and once you have it documented you can edit it. After your first edit, have a few select people edit it, too. Ask them to look for certain things like factual accuracy, persuasive language or any missing details.
- **Have Strict Deadlines:** You need this document sooner rather than later to start using in your fundraising programmes, so it is best not to let the process drag on too long. One month should be enough; and definitely no more than three months.

## Emphasise the social outcomes, or benefits, your organisation produces.

Remember, the whole point of this document is to inspire people to donate to your cause, so make sure it's moving and motivating. Good luck! 🍀

**Bianca Crocker, aka The Fish Chick, is the woman behind Fish Community Solutions; a business that works with small or start-up nonprofit organisations to build sustainable funding models so they can create positive change in our community. She was awarded 2012 Young Fundraiser of the Year and was a finalist in the Global Fundraiser of the Year. Learn more about her at [www.fishcommunitysolutions.com](http://www.fishcommunitysolutions.com) or by following @TheFishChick on Twitter.**

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## How to Assess the Value of Your Sponsorship Offering

could be and knowing there's a solid alignment between who your supporters are and who their target market is are all essential to helping you stand your ground when the inevitable discussions around price come up.

One important thing to note here is that many nonprofits feel that 'in-kind' sponsorship is somehow less meaningful than a cash contribution. It's true that you can do more with a cash investment, but it should not be forgotten that 'in-kind' products or services also have a value. If you are really struggling to get sponsors to invest cash, then targeting sponsors who have the kind of products and services that you would normally have to pay for to run your event or organisation can be a good option. Saving

cash or bringing in cash — either way the budget is happy!

4. **Just as not-for-profits like to raise 'untethered' funds so that they can be applied where needed; how can a not-for-profit maximise their benefit from a partnership by negotiating a cash sponsorship or at least a cash/in-kind mix?**

To make the most of a sponsorship deal for YOUR organisation or event (rather than your sponsor), in other words to maximise the amount of profit you can funnel back into your organisation, means that you have to be truly ready to engage corporate partners.

If you are seeking corporate annual partners (as opposed to event sponsors) then ensuring that you are giving partners access to your supporters across all the ways you communicate with them throughout the year is going to minimise the costs associated with servicing a sponsor.

Providing them with the opportunity

to leverage established channels of communications means that you have already budgeted for the money needed to create your quarterly newsletter, regular e-bulletins, social media campaigns and so on. Any excess funds coming into your organisation can go straight back into expanding the benefits and services you provide to your community of supporters.

Remember, sponsorship is not advertising. We're not talking about logo placement. Corporate partners want the opportunity to connect with your supporters, to differentiate themselves from their competitors and to be able to impact your supporters' purchasing behaviour. Thinking about how you can offer deeper and more meaningful levels of engagement to a sponsor will help you to maximise your allure to potential partners. 🍀

**Abby will present at the FINZ 2015 Master Classes & Conference in Wellington on 11-13 May.**

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