



Developing a Case for Support

A clear and compelling case for support is an essential communications tool for a successful fund development program. An effective case keeps an organization's fundraising efforts focused, engages prospects with the organization's vision for the future, and provides prospective donors—in effect, philanthropic investors—with the information they need to make a decision about helping the organization achieve its goals.

These are the elements that a case for support should include:

Mission & History- *Articulating the organization's mission and history clarifies its purpose and establishes credibility.*

- Define the mission and purpose of the organization
- Describe community need(s) the organization seeks to address
- Delineate the history of the organization

Description of Programs, Services & Accomplishments- *Summarizing the organization's programs and accomplishments underscores the important role the organization plays in the community.*

- Describe the organization's programs and services
- Explain how the community benefits from those programs and services
- Provide specific examples of people who have benefited from programs and services
- Include testimonials and/or quotes from clients and their families community leaders, friends & supporters, as appropriate
- Describe awards, recognition, & honors the organization has received and why they might be important, if it is not obvious to a lay person

Long and Short Term Goals - *Sharing the plans an organization has for remaining viable and continuing to serve the community inspires confidence in its ability to meet community needs.*

- Outline the long term goals of the organization and the short term or immediate needs that must be met first
- Describe how achieving the goals will benefit the community

Financial Position - *Presenting a picture of the organization's financial health and funding needs sets the stage for the "ask."*

- Present a summary of revenues and expenses, including sources and uses of funds
- Explain funding shortfalls—the "gap" between current revenues and organizational needs
- Describe how philanthropic funds will be used



Case for Support: The Basic Format

1. **Introduction** designed to engage interest in the organization and the problem or challenge you seek to overcome.
2. **Brief Overview** of how the problem you're addressing may reflect a more global problem
(show that you're relevant within a broader context.)
3. **History of organization** (show that you're proud of your past.)
4. **Value of your programs and services.** (What is special about your organization?)
5. **Assessment of Need** (compelling challenge that deserves the prospect's attention)
6. **Organization and resources** available to accomplish our objectives. (Who, how and what will make it happen.)
7. **Personal Stories** (give your services a face)
8. **Financial Stewardship** (show that you'll be around in the future)
9. **Donor Opportunity** (What's in it for them?)
10. **Call to Action.** (Ask the reader to take action now, and tell them how you will make it easy for them to do so.)



Final Tips on Writing a Compelling Case Statement

- **Sell solutions, not needs.** Your organization provides solutions to a problem, so don't go overboard in discussing the problems. Identify the problem/need, then quickly show how your organization addresses the need, solves the problem, and why the organization needs the readers commitment and support to accomplish the task.
- **Be subjective.** This isn't an essay or a news article. You don't need to maintain a reporter's objectivity. Appeal to the reader's emotions, and push the hot buttons. Make it personal to the reader. Statistics are boring, so use testimonials and actual stories where possible.
- **Choose your words with care.** Use action words and descriptive adjectives; avoid passive words, constructions like "had been," or adverbs. Create pictures in the reader's mind with your own words. Make positive declarations rather than issuing statements. Be truthful and factual, but compelling. Some words carry more weight and are more emotionally charged than others.
- **Illustrate the narrative.** The Case Statement should be attractive, drawing the reader's eye. Break the copy with headlines and bullets. Use headers and footers. Sprinkle graphics, photos, and illustrations judiciously throughout the narrative. These techniques will help the piece appear easy to read.
- **Lead the reader.** You want the reader to act, to get out his or her checkbook, correct? Then you have to tell them what you want them to do. Tell them how much this solution to the problem your organization is facing is going to cost. Explain clearly how they can make a gift.
- **Remember, you're writing on paper, not carving on stone. Edit.** Read it again; then edit it again. Have someone else read and edit it. Change it when it needs to be changed. Write the narrative, then go back and punch it up. Don't be afraid of going over the top, you can always tone it down, if necessary.