

# Case for Support

---

## Frequently Asked Questions

**Q: What is a case for support?**

**A:** In its simplest form, the case for support is a philanthropic investment prospectus: a straightforward document that tells prospective donors what your organization hopes to accomplish with their philanthropic gifts. A case may be developed for a campaign or for special project fundraising. Frequently however, organizations with successful fundraising programs have developed a case for support that positions the organization for investments that support the full breadth of its activities—from annual giving, planned giving, and major gift programs, to special events.

**Q: What are the criteria for a successful case for support?**

**A:** Sometimes called a case statement, the case document may vary widely in length and format from one organization to another. It is rarely used in its entirety, but rather becomes the source for information and messages that may be tailored to individual donors and a variety of materials. The case is also must-read information for all good volunteers.

Regardless of its appearance, an effective case for support will meet the following criteria.

- The case positions the organization’s fundraising opportunities as investments that are consistent with the values and interests of the donor.
- The case is based on the organization’s strengths, not on its “needs.” Successful organizations identify issues in the community and then demonstrate how they—and their donors—respond positively. The only needs to worry about are your donors’ needs.
- The case positions the organization—its value and impact—in a broad context of community and society; it may also set the tone of abundance, rather than need. For example: the organization has abundant help to give to the community but simply needs your assistance in making that help available; or the donor has many opportunities to share resources and our organization would benefit from those resources because we are doing good in these unique ways.
- The case must be accurate and, in order to be of ongoing value to the organization, it should be refreshed periodically to keep the information current.
- Both emotional and rational, the case includes anecdotes and accomplishments that appeal to the heart, as well as statistical data that include demographics, benchmarks, outcomes, etc.
- The case must make an impact, which is best done if it is to the point, organized, and meaningful. It also conveys a sense of urgency to encourage immediate action by the donor.

**Q: What does the case contain?**

**A:** Every case for support should include:

- **History**—Include background about the organization that conveys to the donor a credible tradition of meaningful fulfillment of its mission, good stewardship of resources, and positive impact on its community.
- **Vision**—In articulating the organization’s vision, you provide a general roadmap of where you are headed and provide an early opportunity to bring donors and prospective donors along with you into the future.
- **Impact**—The case must answer such questions as: What do you do for me? For my community? For our society? Or for education, healthcare, spiritual life, etc.
- **Programs and Services**—Describe the aspects of the organization that make it uniquely valuable to its constituencies and its community. While not necessarily including all programs, provide a variety so donors understand the breadth of services and find opportunities of interest for their support.
- **Fundraising Goal**—The case concludes with the goal and ways in which the donor can help in realizing it.

*The Campaign Case for Support may also include:*

- **Plans and Project Specifics**—The addition of visual information and details about capital projects, for example, will help the donor *see* the vision for the organization’s growth and this project’s contribution to it.
- **Fundraising Details**—For a comprehensive campaign, the goals for each segment of the campaign—capital, programs, endowment—should be included in the case in order to have appropriate information for a variety of donors’ interests.
- **Benefits and Recognition**—The campaign case may include naming opportunities and other forms of campaign recognition.

**Q:** *Who is the audience for the case?*

**A:** The primary audience for the case is individuals who can have the greatest impact on your fundraising success: major gift prospects and volunteer leaders. You can identify your target group by asking these questions:

- Who is our prospective donor? Our prospective leader?
- What is their connection to our organization?
- What are their concerns and aspirations?

**Q:** *Who develops the case for support?*

**A:** Developing the case is an excellent means of building a partnership with prospects and donors and increasing involvement. Through a carefully guided process, the organization invites the participation of key stakeholders and cultivates the engagement and commitment to your organization that may well lead to volunteer advocacy and financial support.

**Q:** *What are the steps in developing the case?*

**A:** 1. **Review research** applicable to your organization—such as feasibility studies, demographic studies, market research, etc.—to determine:

- existing perceptions and attitudes about your organization; and
- donor motivations, including aspirations.

2. **Organize a Case for Support Advisory Committee** that includes key donors and volunteers and the appropriate staff. This committee may include up to ten members; it should vet the case for support during the process and recommend approval of the document to the leadership; and it should meet only until the case process is complete.

3. **Gather documentation** that supports the assertions made in the case. This material will likely fall into three categories that:

- describe institutional strengths—such as annual reports, grant applications, promotional materials, mission statement, etc.;
- justify the fundraising goals—such as architectural plans, budgets, and strategic planning documents; and
- illustrate the issues and communities addressed by the organization—such as economic development, chamber of commerce, professional areas, religious denominations, etc.

4. To strengthen relationship and gather testimonials and anecdotes, **interview selected individuals** who can make the campaign a success, including major donors, the institutional family (staff and volunteers), and representatives of the external philanthropic community.

5. **Write a draft** of the case. Share it with the advisory committee, your organizational leaders, and any additional donors and volunteers the committee may suggest.

6. **Revise the case** based on comments gathered from these various audiences. The committee will then take the case to organizational leaders, such as the board, for approval.

**Q:** *Who writes the case for support?*

**A:** Staff members and volunteers participate in the process of developing the case. The document should be written by an individual in your organization who has been engaged in this process or by a professional writer (who must also participate in the case development process). The writer chosen for this task should have the ability to:

- write concise prose that is well organized and uses language skillfully;
- see the organization through the eyes of donors and volunteers; and
- represent the organization and its vision accurately and balance the many insights collected during the process.

**Q:** *How do you use the case?*

**A:** The case for support is the resource document for creation of the various media used by your organization, including solicitation packets, brochures, video and multi-media presentations, talking points, grant applications, and a variety of promotional materials.

Questions? Please contact us at 437-3000 or [info@benefactorgroup.com](mailto:info@benefactorgroup.com).