

# Building a Case for Support

FUNDRAISING FUNDAMENTALS | 2023



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## Introduction: How to Use This Resource

CCS is proud to present this **Case for Support Guidebook**. For over 70 years, CCS has partnered with nonprofit organizations to make a bigger impact—locally, nationally, and globally. Drawing on our firm’s experience, we are excited to provide this quick reference guide for emerging individual fundraising programs seeking to implement industry best practices. Within this guide, leaders will find resources to:

- Mobilize your organization to better tell your story and build a case for support
- Build a toolbox to better reach your donor audience
- Focus in on ways to effectively share your case for support
- Develop strategies to use your case in practice

## CCS Fundraising Diversity Equity and Inclusion Statement

CCS is committed to building and developing a global team of compassionate professionals that reflects the world and communities in which we live. One where our employees – regardless of race, color, religion, gender, gender identity or expression, sexual orientation, parental status, national origin, different abilities, age, veteran status, or other invisible traits – are valued, are provided the opportunities to contribute equally, and are rewarded equitably. We believe in the importance of creating an equitable environment where everyone receives fair treatment, recognition for their accomplishments, and equitable compensation. CCS will ensure that everyone has equal access to leadership development and growth opportunities within the firm. We are committed to be a workplace that supports our team members to achieve the highest level of success.

We know and exemplify that there is strength in diversity. We believe that building a fair, just, and equitable world begins right here with us.

To fulfill this vision, we commit to taking specific, measurable actions to recruit talented professionals and encourage retention, support professional development, respect, and learn from all cultures, and create a vibrant community.

## CREATING A VIBRANT CLIENT COMMUNITY

We strive to ensure that our commitment to diversity, equity, and inclusion is reflected in the organizations and communities with which we partner. We know the importance of understanding and addressing the unique needs specific to our client partners around the world.

## Introduction: Why Build a Case for Support?

### WHAT IS YOUR STORY?

Creating your case for support or case statement is one of the most important exercises a nonprofit can undertake. The case for support tells potential donors and funders *who you are, what you do, where you provide your services, who your services are for, and when*. It also lets potential donors and volunteers know how they can get involved and donate.

A good case for support does all of this. A great case for support does all of this and more.

Just as a great novel grabs the reader's attention and draws the reader in, a great case statement paints a vivid picture of the problem you are addressing and how your organization is uniquely positioned to resolve the problem. *Your case statement should highlight the importance and urgency of your work, and the impact your work is having on your partners*. It should entice potential donors and volunteers to learn more and to help.

## Glossary of Relevant Terms

**Case for Support:** The story of your organization – your impact, why you exist, what differentiates you, and what you want to do in the future. It is a specific package you put together to use to explain to potential donors why they should support your organization.

**Campaign:** A focused fundraising effort by a nonprofit organization to raise an amount of funds in a specified period. The money raised goes to specific projects such as acquiring or renovating a building, establishing or growing an endowment, or other capital or program needs.

**Annual Appeal:** A year-long fundraising effort asking donors for general operating support. It will repeat year after year. The appeal is most commonly in the form of a letter but may also be distributed through emails and other social media platforms over the course of the nonprofit's

fiscal year, as well as through personal outreach. Multiple communications are needed – both to encourage people to give, and to report back to donors who gave the previous year and share with them the impact their gift (along with other fundraising) had on the work of the organization.

**Board of Directors:** The governing body of a nonprofit responsible for overseeing the organization's activities. They often serve as the nonprofit's fiduciaries. The complementary Board materials in this package provide greater detail on the role of a Board including the number of members of the Board of Directors, time limits for the members, and more.

**Stakeholder:** Every person or entity associated with the organization. This includes board members, donors, volunteers, members, and perhaps most importantly, the community you work with and other partners.

**Donor:** A person, foundation, or business that provides financial philanthropic support to an organization without expectation of services or favors in return.

**Budget:** A financial plan that estimates revenue and expenses for a defined period of time, usually one year. The budget should be established and approved at the annual Board meeting. It should be monitored monthly by the board, or a committee of the board. In some cases, the Treasurer of the Board of Directors is responsible for submitting a report to the board. In other cases, especially with small organizations, if there is no treasurer, the budget may be prepared by a combination of staff and volunteers.

## Building Your Toolbox

All organizations have different needs, but certain basic documents and resources will help tell your organization's story. Any piece of information that you feel adds to your audience's understanding of and appreciation for your organization can help your case for support drafting process. The following list points out key pieces that convey your story and impact to different audiences:

**History of the Organization:** Incorporation papers, by-laws, and newspaper clippings are great resources to find important dates and names, and to build a timeline of your organization's history.

**Photos:** As they say, "a picture is worth a thousand words." Historical and recent photos help to tell your story more succinctly and emotionally than words alone. Ensure that your photos are high-resolution so they present well in print and online.

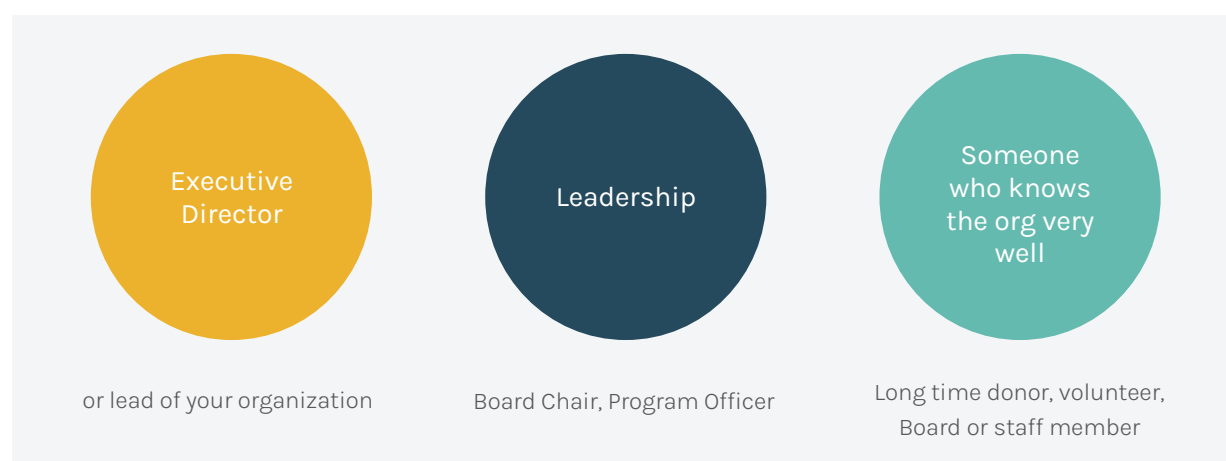
**Testimonials:** A great quote can be a powerful tool in making your case. Interviewing a founding board or staff member, or past or current client can help you put your work into words. Stories from those in the community that your organization has helped are especially powerful. For the most inspiring story, focus on highlighting the impact your work is having on the people in your community.

**Statistics and Figures:** Use numbers to demonstrate impact. How many people did you work with last year? How many people can you feed with \$20? What is your graduation success rate?

**Budget:** Your annual budget is more than just accounting - it sets revenue goals for the annual appeal, events, and special appeals. It also sets spending goals for programs and services. You do NOT need to include the budget in your case. Instead, use it to inform your narrative, and pull-out small pieces to highlight. Use a few numbers to let your donors know why it is important to give to your organization. They should speak to your impact, or the needs of the organization. For example: "With your help we will feed 6,000 people this year."

## Assembling Your Team

In drafting the case, it is important to ensure that the case accurately describes your *impact* and reflects your mission. The best people to gather for the purpose of putting this vision to paper typically are:



The process of developing the case should focus on succinctly and clearly outlining *what* you accomplish, *how* it is accomplished, and *why* that impact is valuable or important. The "why" is key

because it will provide an answer when potential and current donors ask why they should support your organization. Include the key takeaways responses to the “why” question on paper and share them among a small group to gather consensus.

## Gathering Feedback

In addition to assembling the team who will work on the case for support, it is useful to receive regular feedback from individuals who are associated with and committed to the organization, familiar with its work, and have a vested interest in its future. Hearing their perception of the organization from outside your immediate circle can often be helpful. These people may include:

- Board members
- Staff
- Donors
- Other internal leaders

Furthermore, it may be helpful to seek feedback from:

- Volunteers
- Customers and/or clients
- Community partners

We recommend hosting one or more meetings dedicated solely to reviewing the case for support, talking through its purpose and target audience, and gathering feedback along the way. Drafting a case for support is a great opportunity to engage meaningfully with your organization’s leadership and volunteers to build an important fundraising tool together!

## Sharing Your Case for Support

The main purpose of the case for support is to express to donors and potential donors the clear “case” for why they should provide support to the organization, either monetarily or with their time. As such, the audience can vary widely.

AUDIENCE	PURPOSE	FORMAT
INDIVIDUAL PROSPECTIVE DONORS	Inspire giving	Brochure; website; social media
LEADERSHIP/BOARD	Inspire giving; educate on mission and activities	Brochure; talking points
FOUNDATIONS	Qualify for giving	Content for grant application or proposal
EXISTING DONORS	Provide accountability; convey impact of their investment	Thank you letter; annual report; social media or website; individual report

Your case also provides a framework to build additional materials that will explain the work of the organization to communities beyond just your donors. Depending on the structure of the organization, your case can be used to communicate with:

- Customers/clients/members
- Volunteers
- Community

## Building Your Case Worksheet

First, gather a team to serve as a “Case for Support Task Force” or “Committee” dedicated to drafting your case and gathering additional feedback.

Once you have recruited a task force, set aside a series of meeting times to brainstorm ideas, review what you assembled for your toolbox, and start your draft document. Finalizing your case for support will be an iterative process and will likely take a few rounds of revisions; putting pen to paper is the most important first step.

The following worksheet is designed as a starting point for your task force to get the conversation started. This worksheet can also serve as an early outline for your case.



1. Our organization does \_\_\_\_\_.
2. The impact of our work is \_\_\_\_\_.
3. We help \_\_\_\_\_ community.
4. Our goal is to \_\_\_\_\_.
5. We measure success by \_\_\_\_\_.
6. Each year we \_\_\_\_\_.
7. Your support will help us \_\_\_\_\_.
8. Our vision for the future is \_\_\_\_\_.
9. With increased funding/support, we would be able to \_\_\_\_\_.
10. Your support will improve our impact by \_\_\_\_\_.
11. What I love most about our organization is \_\_\_\_\_.

## Your Case in Practice

Your case for support can be used to tell your organization's story and vision to many different audiences and through many formats. To start, focus on your organization's audience and how they prefer to receive information. The standard format is a brochure or website, clearly outlining your work and future goals, along with an "ask" for the reader to support the nonprofit through a donation.

In addition to being a standalone document, the case provides your core narrative in clear terms. Therefore, the language or message of the case can be referenced in many other materials you create. Documents that could use the case as a source or background document include:

- Brochure or pamphlet to introduce and highlight your organization to a new audience
- Speaking points & presentations for staff, board members, and volunteers
- Media presence through websites, videos, and printed materials
- Regular written content like annual appeal letters, thank you letters, and white papers
- Events and fundraisers
- Applications for grants, foundations, or creating "letters of intent" for applications
- Gift recognition opportunities

In addition to being able to reference your case through platforms such as your website and annual appeal communications, consider your case for support to be an important tool that spells out the narrative you communicate with your donors, members, and other stakeholders. Regardless of where the case is used and how often, *it should be a living document*. You should always be ready to edit, update, and refine the language and content so that it grows and evolves along with your organization.

## Refining Your Case

Design and language play a big role in shaping your case for support but simple is better. Stick to these rules when drafting your case:

1. *Simple language is best*. Do not make your case too wordy or rely too heavily on jargon.
2. Draft the case for support with the *voice of the donor in mind* – what do they want to hear about your organization’s story?
3. Maintain *consistent color choices and fonts* throughout the document.
4. Use *free or low-cost design tools* to help you design a case (without having to hire a designer):
  - Canva, an online design platform that has simple, easy to use templates and designs
  - Microsoft Office Templates via Word and PowerPoint
  - Website Design services like Squarespace, Wix, and Cargo

## Summary and Key Takeaways

- The case for support tells potential donors and funders *who you are, what you do, where you work, and when*. It also lets them know how they can get involved and donate.
- Many hands and voices should go in to drafting and shaping the case for support. Offer multiple opportunities for folks to weigh in on the content.

- Your case for support provides the core narrative for your organization. Use it to communicate the impact of your work and keep it as a living document that changes alongside your organization's needs.
- Assemble a team of trusted colleagues, board members, and core supporters to help draft and weigh in on your case for support. And use this case building work as an opportunity to help team members feel closer to your organization. Make sure the case answers these key questions:

- › What is your organization's impact?
- › Why support this organization compared to a peer organization?
- › What do you need?
- › What do you want to do next?