

## **Guidelines for Preparing a CASE FOR SUPPORT**

### **What is a Case For Support?**

For fund-development purposes, case for support refers to the written document that outlines everything anyone should know about the organization, the community need it serves, why charitable contributions are necessary, and how these gifts benefit the prospective donor. The picture it paints is both rational and emotional. The emotional elements speak to the heart. The rational side illustrates how the gift becomes an investment in the future. Most often, a case for support is associated with capital campaigns--where it is certainly critical.

The case for support is an internal management document, which is used by staff and volunteers. This document could be 10 or 15 pages long. It is your guidebook for why you are raising money.

From the case for support, you develop external communications materials (proposals, brochures, speeches, videos, etc.) for target audiences.

### **What is the Purpose of a Case For Support?**

- Attracts support for the solutions your initiative wishes to accomplish
- Builds consensus and buy-in
- Increases stakeholder commitment
- Attracts volunteers to fund raising, program, public policy, etc.
- Builds community awareness
- Researches and collects valuable community attitudes
- Tests marketplace readiness

An effective case for support is written from the perspective of the potential donor, to persuade him or her that financial support of your institution is consistent with personal goals. If the potential donor's needs and wants can be determined and you are able to show how your institution can meet those needs and wants, you will have the foundation for a successful program.

### **What Should Be Included in a Comprehensive Case For Support?**

Think about writing a proposal to a foundation. What would you include?

#### **1. The Problem (or Opportunity) to be Addressed**

- Talk about community need.
- Talk about the people who need and want your service.



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### **2. Trends Affecting the Problem (or Opportunity)**

- Demonstrate your knowledge and insight.
- What is happening in the world and your community that has produced this problem?
- What is happening now?
- What do you anticipate happening in the future?

### **3. Your Response to the Problem (or Opportunity)**

- How does/will your organization respond to the community problem or opportunity?
- How will you respond to the trends?

### **4. Role of the Prospective Donor**

- Engage the prospective donor.
- Focus on target audiences and the key messages for each audience.
- Describe how a prospective donor might participate in addressing the community problem or opportunity. Talk about how you can help the prospective donor achieve his or her own goals and dreams.
- Describe donor acknowledgement and recognition opportunities.

### **5. Your Mission**

- Now is the time to weave in your mission. You exist (your mission) because you wish to respond to community situations.
- Explain how your response to this particular community situation fits in with your overall mission.

### **6. Your History and Marketplace Position**

- Explain why you are the right organization to respond to community situation.
- Demonstrate why the prospective donor should believe that giving money to your organization is a sound investment.
- Make sure you position your organization within the marketplace.
- How are you different from other organizations doing the same or similar work?
- Talk about cooperation and collaboration.

### **7. Goals, Strategies, and Objectives**

- Provide detail about how you will respond to the community situation.
- What, specifically, are you going to do? Why? When?

### **8. Organizational Resources**

- Demonstrate that you have the resources necessary to address this situation.
- Describe your staff, professional expertise, volunteer structure, operations, and so forth.



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- Talk about finances. How you currently finance your organization, and how you propose to finance this new activity; what kind of money is necessary; how you will raise the money; and who is helping you raise it.

### 9. Accountability and Evaluation

- You must assure the prospective donor that you comply with all relevant regulations and laws, and that you are good managers of the organization, its programs, and finances.
- Describe how you evaluate program and institutional health.

### 10. Future Organization Plans

- Present your organization's goals and activities that will continue to help the community address the situation in the future.

### Who is the Audience for a Case For Support?

The audience for the case for support is relatively small. A larger number of people will be exposed to the marketing materials that are derived from the case than will read the actual source document. To define the target audience, ask the following questions:

- Who is our prospective donor?
- Will we appeal to a broad audience, or a closely knit institutional family?
- What is the donor's connection to the institution?
- What are the donor's most basic concerns and greatest aspirations?

The primary audience consists of those who can have the greatest impact on fund-raising success: major gift prospects and volunteer leaders. Quoting these leaders in the copy can add even more weight and interest to the case, and also encourages them to become more involved in the campaign.

### Now What?

After preparing a detailed case for support that describes your organization, the next step is to translate it into a compelling case statement. The Case Statement is the public version of the case for support. A case statement should:

- Be brief.
- Demonstrate success.
- Be targeted to the motivations of each specific market.
- Describe how the contributor's investment will solve a specific problem.
- Be compelling.

The Case Statement conveys the strength, vision and capacity of your organization in such a way that people are motivated to become engaged financially.