

A CASE TO REMEMBER: Developing an Effective and Convincing Case for Support

The Case for Support provides organizations the opportunity to translate their strategic plan and current needs into a bold vision and strong case for philanthropic support.

Rather than a shopping list of needs, an effective and compelling Case for Support incorporates a storytelling approach to clearly and convincingly illustrate your organization's unique mission. It invites donors to learn about the urgent needs and opportunities, and to be a part of the solution through philanthropy.

Effective Case for Support

The prime purposes of a Case include:

- Providing leadership accordance on the funding priorities, scope, and relevance
- Equipping influential volunteer leadership with the vocabulary to generate support for the fundraising efforts
- Engaging donors in both the cultivation and solicitation aspects of the fundraising cycle
- Sharing "insider information" on the organization and its vision for the future
- Serving as the basis for various expressions of the Case including specific communications (print and digital), philanthropy-based marketing collateral (brochures, video, etc.), fundraising communications (appeals, proposals, etc.), and verbal communications (elevator speech, campaign event remarks, etc.)

Questions Answered within the Case

In designing the Case, the organization's uniqueness and the audience's ideas and questions should be considered throughout. Guiding questions to answer within the Case include:

Why is your mission unique?

- Most likely, your organization is not the only one in the industry or field. Yet you are the only organization with your specific story, background, history, impact, and constituencies. Draw on that to set your organization apart. Convey that uniqueness throughout the Case.

How are you going to accomplish that mission?

- Tell the story of your work by accurately describing the programs of your organization. Words and numbers (data) may be intertwined to fully demonstrate the impact of what you do.

What is the urgency?

- Emphasize the necessity of taking positive action now.

What is the impact on constituents?

- Demonstrate how the organization will carry out the programs – measurably – and how those involved are capable of achieving the objectives.

What societal issues are you solving?

- The Case is bigger than your organization and must be of value to society and affect change, rather than just benefit your organization. Explain how quality of life will be improved long-term, stress opportunities more than needs, and emphasize the ability of your organization to address a pressing problem in the world today.

What are you asking your donors to do?

- Provide a clear fundraising goal and a Call to Action so that readers of the Case know what you are asking of them.

The goal of all Cases is to connect, engage, and inspire an audience. To do so, keep your Case:

Brief

- Answer the questions posed in no more than 12 pages.
- Replace lengthy paragraphs with meaningful infographics, photographs, or other imagery that tell part of the story in a more visual and more concise way.

Forward-Thinking

- While including accomplishments to date provides a layer of legitimacy to your organization and programs, do so quickly and then shift to forward-thinking narrative.
- Focus on the future rather than celebrating the past and what must be done now to meet tomorrow's needs.

Optimistic

- Philanthropy flourishes in an atmosphere of optimism. Express confidence in your ability to accomplish your goals and objectives as outlined in the Case.
- "With your generosity, we will get there" versus "We will close our doors if you do not help."

Big Picture

- Effective fundraisers do not talk about hospitals, emergency rooms, or clinics, they tell a story about health. They do not talk about schools, colleges, endowments, and buildings, they tell a story about a student thriving thanks to education. They do not talk about galleries, theatres, books, or symphonies, they tell a story about a community finding a fuller and more enriching life.

Authentic

- Because of what you do, authentically, you are respected and the world is a better place.
- Your organization is unique and what your organization does contributes to the improvement of our society. Express that.

About The Compass Group

The Compass Group is a national fundraising consulting firm with a portfolio across the sectors of conservation, preservation, performing and visual arts, higher education, secondary education, history and culture, healthcare, and environmental. Since its founding in 1998, Compass has guided over 150 organizations of varying scales, resulting in more than \$2 billion in philanthropic gifts. Through its tailored consultation, Compass builds relationships, strategically assesses, and mindfully incorporates the specific resources and priorities of its clients to ensure philanthropic success at the highest, most specialized level.