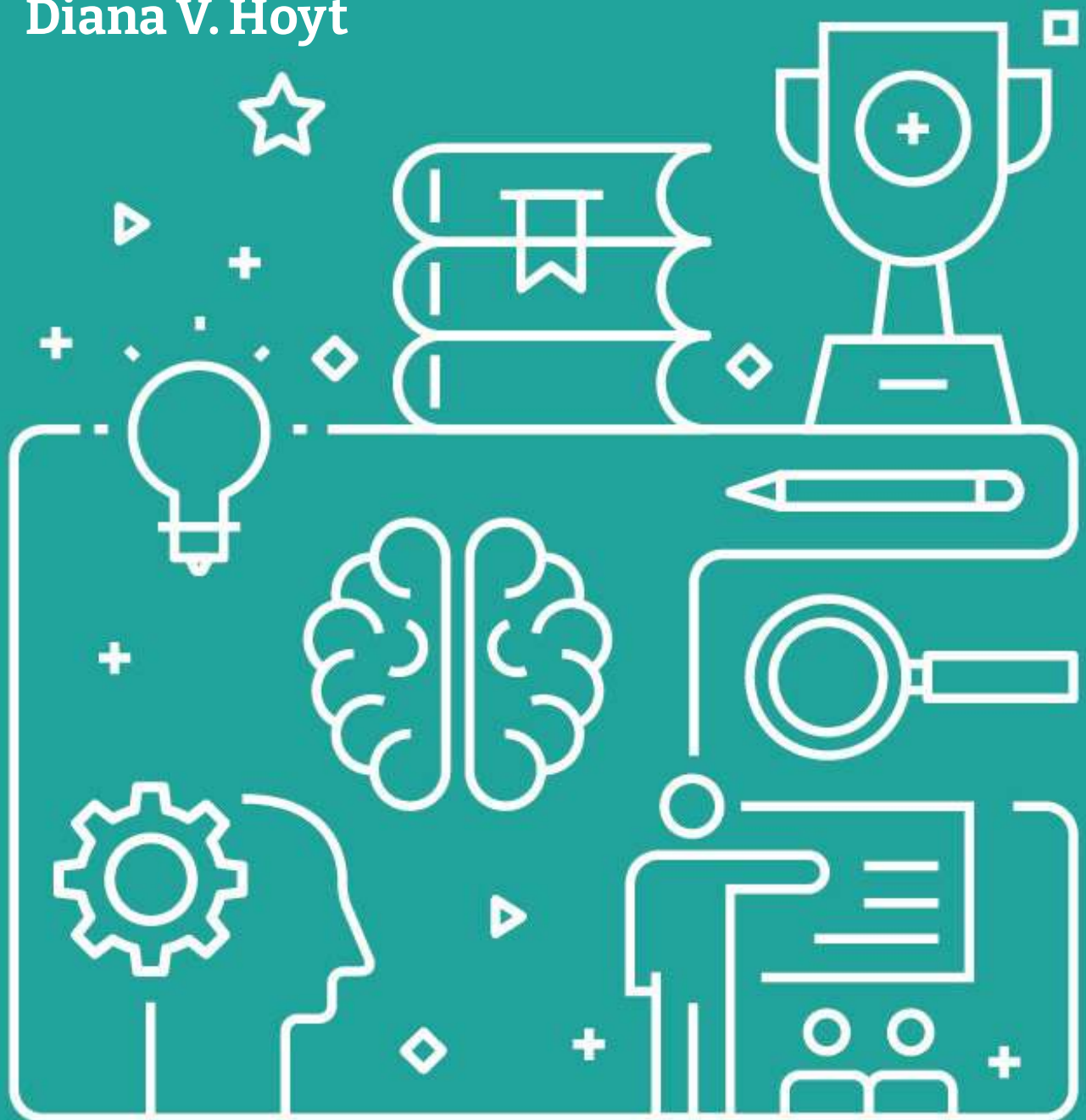


Writing a Compelling Case for Support

Diana V. Hoyt



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Diana Hoyt believes in the power of the nonprofit sector to weave a tapestry that wraps our communities in warmth, healing and enlightenment. With this belief she understands the immense role fundraising and philanthropy pay in supporting the endeavors of nonprofit professionals and volunteers. She works with nonprofit organizations throughout the United States encouraging them to utilize their databases to strengthen their fundraising efforts.

Diana has over thirty-five years of professional and volunteer fundraising experience. This includes creating five nonprofit development offices in the Greater Phoenix area and being involved in almost every facet of the development process. She has provided fundraising consulting and training to hundreds of nonprofit organizations nationally.

In 2021, she started a fundraising consulting and training company, Formula for Fundraising. Diana focuses on data-driven strategic and sustainable fundraising solutions in writing fundraising plans and implementing annual fund campaigns.



Diana is a current member of the Northern Arizona Chapter of the Association of Fundraising Professionals and a member of the Association of Philanthropic Counsel. A graduate of Kansas University, she has a Master's degree from Arizona State University. Diana lives in Phoenix, Arizona. She is married, the mother of two adult children, and the grandmother of three beautiful granddaughters. Diana's book, *Formula for Fundraising: Embrace Your Donors for Greater Success*, is available on Amazon.

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Writing a Compelling Case for Support

The Case for Support, sometimes called the Case Statement or simply the Case, is one of the most critical documents a professional fundraiser writes. In a perfect world, the Case would be based upon an organization's strategic plan. Lacking a strategic plan, the fundraiser will glean from the board of directors and key staff the direction the organization is moving and what services and programs will be started or expanded in the following year. Given that information, the fundraiser will write the Case and then the fundraising plan which will detail the fundraising activities that will raise the dollars to bring the Case to fruition.

In an article "An Open and Shut Case," written by Chris Peterson and published in the July – August 1994 Contributions, Peterson described the Case as follows:

"As clearly and persuasively as possible, your case statement lays out your history, purpose, and plans, but more importantly it presents the reasons why someone should invest in your organization and the benefits that will result from that investment."

The key ideas in Peterson's description are "why" and "invest." He saw the Case as delineating why someone would make a charitable donation and he saw the donation as an investment in the organization; an investment in the mission. Harold J. Seymour wrote in his book, *Designs for Fund-Raising*, in 1966, the case "should aim high, provide perspective, arouse a sense of history and continuity, convey a feeling of importance, relevance, and urgency, and have whatever stuff is needed to warm the heart and stir the mind." The Case needs to inform in a manner that is inspiring and provocative.

What is a Case for Support?

The Case for Support is a written document presenting the compelling reasons why an organization deserves support and the urgent needs that support will meet. The Case answers the question: Why among all the multitude of organizations should your organization be singled out for financial support?

The Case is most often written by the chief development officer. If the organization does not have a development officer, then the chief executive most likely fills that role and would write the Case. The person who writes the Case will want to seek input from other staff, the board of directors, and volunteers regarding the four sections of the Case. Because the Case is a powerful tool for building consensus and commitment among the primary stakeholders, having their input ensures buy-in.

The Case is important because it helps establish credibility with all of the organization's stakeholders. The Case will provide the rationale for raising money for specific services and programs that benefit the community and the stakeholders. Because the Case creates a consistent message, everyone is "singing the same song," there will be a greater likelihood of it resonating within the community and therefore being successful.

How to Use the Case for Support

The Case for Support is the basis for every fundraising activity conducted during the tenure, normally a year, of the Case. Whether the organization is creating a new brochure, writing an appeal letter, submitting grants, doing an email campaign, or posting an ask on social media, the foundation for all those activities will be found within the body of the Case for Support. An organization begins with the Case and then all other fundraising activities and communications will flow from it.

If the organization is also conducting a major campaign, such as a capital or endowment campaign, it is advisable that a separate Case be written for that campaign. It is not necessary to write a separate Case for programs or departments within an organization. There is nothing wrong with creating numerous case statements; however, having a number of case statements can be confusing to stakeholders. In addition, the amount of time to create more than one Case is unrealistic for most development offices.

Recruiting board members becomes an easier task when the prospect is handed the Case. The prospect can quickly determine the organization's history, how it is currently serving the community, and the urgency of the organization's continued service to the community. The Case will draw the prospect to the vision of the organization and its impact. The simple fact that the vision and mission of the organization have been organized into an easy to read document will capture the interest of the prospective board member.

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Likewise, the Case can be used in part or whole to cultivate current and future donors. The Case is especially powerful with large donors. They can quickly visualize their role in helping to implement the Case. Having a well-written Case for Support signals all stakeholders and prospects that the organization is serious about its goals and raising money, and is ready.

Writing the Case

In writing the Case, approach the process as if writing the organization's story. Like any story, it will have a beginning, middle, and end. The final document will be between three and seven pages. Unless there is a really good reason, seven pages are the maximum most individuals will read. The document will include pictures, graphs, quotes, bullet points, and white space. The Case can have a professional cover. You want the document to look professional, but neither elaborate or expensive. The Case can even be designed as a brochure.

The Case will have four sections:

- I. Introduction of the Organization
- II. Current Programs and Activities
- III. Vision for the Future
- IV. The Action Plan

The Introduction

When writing the Case, keep in mind that you will only have three to seven pages to cover all four sections. The first section, introduction to the organization, will cover a brief history of the organization and state the organization's mission. For older organizations keeping the history brief is often challenging, yet necessary.

Writing a Compelling Case for Support

Because every word will count, it will be important to hit the highlights. For example:

Since opening its doors in 1990, XYZ Organization has served more than 100,000 families.

Two very important points were made in the opening sentence: the date the organization started and its accomplishment in number of families served.

Relating the story of a client served or the impact on the community in just a few sentences can introduce the organization to the reader. Descriptive sentences are powerful and pull the reader into the organization's narrative. For example:

Imagine yourself as a 4 year old in a loving family where no one reads. No one ever sits down with you in their lap and reads a story to you. You never see anyone seated at the breakfast table or on the couch reading the newspaper. You enter school at age 5 with only a few hundred words of English vocabulary and perhaps no more in your native language. Illiteracy is a debilitating, self-replicating condition.

The first sentence or paragraph of the introduction will begin the journey for the reader. Whether it relates a story or provides important information, the initial words need to entice the reader to be moved to continue reading.

This section is also about tooting the organization's horn. Explain to the reader those things that make the organization unique; that set it apart from organizations that are doing the same type of work. Whatever is special about your organization, its programs and services, the clients served, or the staff and volunteers, let the reader know. Other items that can be included in this first section include special accomplishments and any recognition or awards received.

Writing a Compelling Case for Support

This section of the Case should be the easiest to write and the shortest. If there is anything difficult in this section, it will be narrowing the amount of information to tell the story of the organization.

Current Programs

This section will explain what programs and services the organization delivers. Most organizations have a number of programs and services operating at any given time. Describing these briefly, and with clarity, will be important. This is akin to writing a grant. It is not the place to use an abundance of adjectives. Be as thorough as possible so anyone reading the Case will have a solid understanding of how the organization currently delivers its mission.

Within the program descriptions explain who the organization serves. Again, be very clear. Examples would be: • Homeless women veterans rather than homeless veterans • Children 8 to 12 years old rather than children • Young adults ages 16 to 30 with autism rather than young adults with autism

Clarity is extremely important in defining the population you serve. This is important with individual donors and especially with foundations and other grant-making organizations.

The final item to be included in this section is the geographical area served. The area could be a city, a county, a state or region encompassing a few states, the United States, or international. Many funders only make donations within specific geographical boundaries. Provide as much information as possible. If you are a statewide organization, you might show a state map with counties. The map can display how many people you served in each county within the past year or past three years. This demonstration is an easy indication of the organization's impact.

This second section describes what the organization currently does, who it serves, and where those services are provided. If any of these three items are not reflective of the organization's stated mission, explain what has happened that created the change. You have to be very clear that the current services and programs implemented by the organization demonstrate an adherence to the organization's mission.

The Vision

This is where the Case becomes exciting. You have explained the organization's history, achievements, what the organization does and who the organization provides services and programs to, and where all of this takes place. Yet, there is a problem to solve or an unmet need that needs addressing within the boundaries your organization serves. The organization's staff and board has a vision, an idea of how to solve the problem or meet the need. This section is where the audacious plan is laid out.

Begin by clearly defining the problem or unmet need. Provide as much detail as possible, yet keep it short. Statements such as:

There are over 1,000 women veterans living on the streets in our community. Most of these women are veterans of recent wars and suffer from severe physical disabilities, post traumatic stress disorder, and mental illness.

A very few words can be extremely powerful and paint a vivid picture of the problem. You might consider a brief explanation of how this problem became an issue within your community. This should be followed by a brief explanation of why the organization is uniquely capable of solving this problem. Experience counts. Let the reader know how the organization has successfully managed similar problems.

Finally, this section needs to explain how solving this problem will change or benefit the lives of the recipients of the services, as well as how the program will benefit the community and subsequently, the donors. This section will truly embrace the organization's mission. The unmet need could be:

Due to the cuts in school budgets, art programs have been slashed from most elementary school programs. The Art Museum will provide traveling art exhibits to the schools with trained docents to demonstrate to children ages 6 to 12 the value of art in society and its impact on humanity.

The statement of the problem or unmet need needs to resonate with the reader and they need to see themselves as part of the solution.

The Action Plan

This final section is where the plan to solve the problem or unmet need is developed. It needs to have specific, quantifiable objectives. • The organization will provide temporary housing for up to 18 months for 100 women and mental health counseling for 50 each month. After appropriate mental health screening, job placement processing will be offered to as many as 30 women each month. • Following the creation of the traveling exhibit, 10 docents will be trained to provide the curriculum to the elementary school-aged children in grades 3 and 5. Schools will be targeted in different socio-economic areas of the community to gauge the response of the school administrators and the parents.

The action plan will have a timetable. Be very clear regarding what needs to be accomplished and by what date. This will help guide the implementation of the project and enable stakeholders to visualize the progress. A timetable helps encourage accountability. Staff and volunteers will understand their roles and responsibilities. Understanding what needs to be accomplished and when makes a difference to those who are active participants.

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To fulfill the vision, the organization will need specific resources. These can include purchasing equipment, hiring staff, recruiting volunteers, and developing materials such as educational guides, performance surveys, and program evaluations. The action plan will delineate the resources needed and the cost for these items. Stakeholders will know exactly what is needed to implement the vision and be successful. When these items will be secured needs to be stated in the timeline.

The Case will end with an explanation of how the financial resources will be secured. This can include a targeted appeal, a major gifts initiative, a more extensive search for regional grant opportunities, or launching a recurring giving program. The organization might list all of these or a combination of them. The board and staff will need to look at the organization's past fundraising efforts and determine what will be the most successful going forward.

The Case needs to resonate with anyone who reads it. That person whether they are a foundation or corporate executive or a member of the community needs to see themselves as part of the solution. They need to see that they can participate and make the vision a reality.

It will be very important at the conclusion of the project to be able to report to the donors and the community the impact of the program. Even if a program is not successful, let donors know why or why the program worked, but did not reach the measurable goals. Sharing this information is one of the best practices for donor retention.

Testing the Case

Does the Case resonate with stakeholders? You can select a small number of individuals, both current donors and non-donors, and send them a copy of the Case. Let them know you will be calling them to discuss the document and to receive their feedback. Questions you might ask when calling them: • What is most appealing about the Case? Least appealing? • How does the Case make you feel about the organization? • What did you find most surprising? • Does the Case create a sense of urgency? • Does the Case motivate giving?

This will not only provide feedback, but is also a wonderful opportunity to speak with donors and prospective donors and gain their insights into the organization.

Key Points in Writing the Case

- It will focus everyone's thinking around the future of the organization.
- It will tell the organization's story.
- It sets the stage for all fundraising activities.
- It creates a sense of urgency, not desperation.
- It tells the reader what you want them to do.

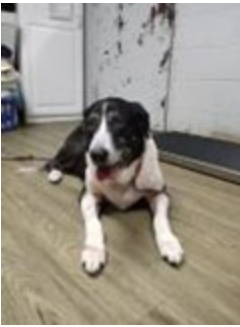
Once you have completed the Case for Support, you are now ready to write the Fundraising Plan. The Case has provided the direction and measurable goals for all development activities.

Example Case for Support

Percy Animal Shelter

Case for Support

Percy Animal Shelter



Timmy was crying. I heard dad say, “we can’t take the dog with us.” That’s me; the dog. They all left; and I was alone.



Over the past couple of years, this scenario has been repeated thousands of times across the country.

Abandonment of animals is one of the many stories that plays out in every community and county in every state.

Percy County is not immune. Lost and abused animals are frequently brought to Percy Animal Shelter, as are animals that people decided were too much effort to care for or too costly or they simply could not manage with their current living situation.

Geraldine Williams Animal Shelter, a 501 (c)(3) charitable nonprofit, was founded in 1953 and rebranded as Percy Animal Shelter in 2018. The mission of Percy Animal Shelter is to improve the lives of animals in Percy County, Montana.

When the shelter changed its name to Percy Animal Shelter, the organization also joined No Kill Blue Sky with the goal of helping to create a state-wide community of no kill animal shelters. Percy Animal Shelter is very proud of its record of not using euthanasia as a means of managing pet overpopulation since January 1, 2018.

In support of Percy Animal Shelter's mission, the board and staff of Percy Animal Shelter are committed to:

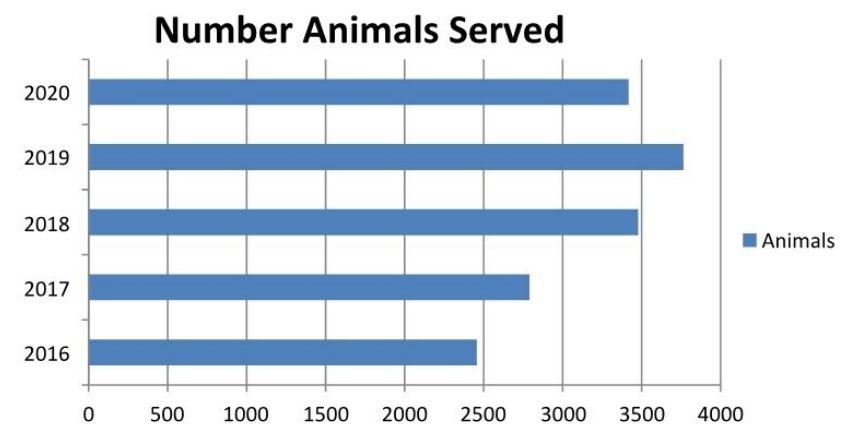
- Ending unnecessary euthanasia and giving every animal a chance
- Combating animal overpopulation by encouraging spaying and neutering
- Championing responsible pet ownership through public education
- Feeding the hungry, sheltering the homeless, and protecting the abused
- Reuniting lost pets with their families and finding homes for strays

Serving the Community

Percy County has a legal obligation to provide a shelter for the animals within the county. To fulfill this obligation, the county elected to contract with Percy Animal Shelter. Percy Animal Shelter is proud to serve 15 communities within the county with a total population in 2020 of almost 195,000 people.

As an open admission shelter, Percy Animal Shelter is obligated to take in every animal that is delivered to the shelter. Consequently, whether Percy Animal Shelter has sufficient space, financial resources, or volunteer and professional staff, it must shelter, feed, and care for any animal that is in need. When other animal shelters or rescues can turn away a dog or cat due to its age, breed, health, or temperament, Percy Animal Shelter cannot and does not.

Percy Animal Shelter is a brick and mortar facility built to house 200 animals. Partially due to the pandemic, in 2021 the shelter has been housing upwards of 420 animals. Some of the animals are dropped off by individuals who can no longer take care of the animals within their household or are brought in by Percy Animal Control, the county's animal control department. The Percy Animal Control works throughout the county picking up lost animals and animals reported as abused and transporting them to Percy Animal Shelter.

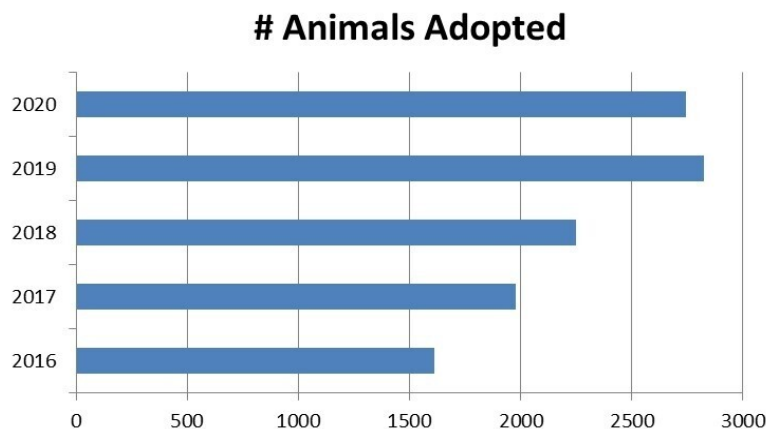


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Upon arrival at the shelter, all animals are assessed as to their needs. A staff veterinarian manages medical care. Some of the animals arrive dehydrated, malnourished, and injured. Because Percy Animal Shelter is a private entity, it is able to provide medical services that exceed those of most county owned and operated shelters.

Animals not needing special medical services are taken care of by Percy Animal Shelter's staff and volunteers. Most often these animals just need positive human contact and caring.

In support of Percy Animal Shelter's mission, in 2020, Percy Animal Shelter provided 13,167 vaccinations to animals within the county and performed 2,768 spay and neuter surgeries. Prior to adoption, all animals are vaccinated, microchipped, and spayed or neutered.



Creating a New Environment

In its overcrowded conditions, Percy Animal Shelter has struggled to keep up with the needs of so many animals. To add to a difficult situation, the shelter has experienced flooding on numerous occasions. Volunteers and staff have always rallied to help the many animals under Percy Animal Shelter's care. They work diligently to reunite animals who are lost with their families and finding adopted homes for other animals. When neither of these options are possible, outreach is made throughout the county to place animals in temporary, foster homes.

Percy Animal Shelter has embarked on a capital campaign to raise \$3.5 million dollars for a new, larger shelter. The current shelter is almost 70 years old and damaged beyond repair by flooding. The campaign will continue through March 2022 and then it will take another 8 months to build the new shelter. Percy County has committed one million dollars towards the new shelter and a neuter and spay clinic that will be available to all the county's residents.

During this time the animal population at the shelter, based upon prior years' experience, will continue to grow as will the cost of medical care, food, and other resources to maintain the safety, care, and well-being of the animals.

The current budgeted income includes the contracted amount from Percy County, grant and event income, shelter fees, and donations from individuals.

Envisioning a Brighter Tomorrow

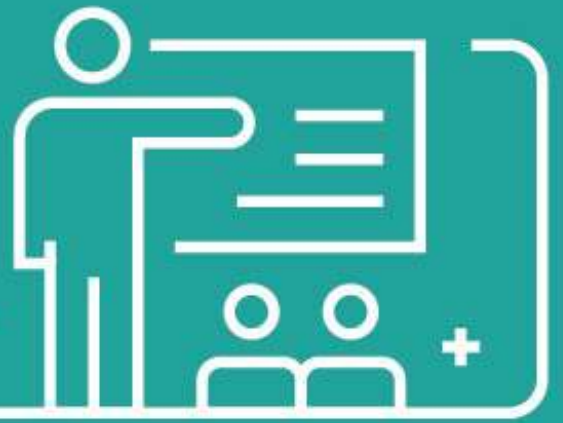
To manage the critical needs of animals needing shelter, the Percy Animal Shelter board of directors has hired a development officer to expand its fundraising program. This individual will be seeking corporate funding and event sponsorships. More importantly, the development officer will be focused on expanding individual donor giving and donor retention.

Nationally, individual giving was 78% of all charitable contributions in 2020. This does not take into account the percentage of giving from family foundations. As event giving is primarily from individuals, Percy Animal Shelter has approximately 52% of its total income from individuals. Over the next three years, sustainable strategic goals will be to increase the organization's individual giving by 5-10% of its total giving each year. This will be done parallel to the capital campaign.

Individuals are the heart of any giving program. Numerous opportunities including monthly giving, peer-to-peer fundraisers, Giving Tuesday, and a year-end appeal will be implemented. Donors to the capital campaign will also be asked to make a gift to the Percy Animal Shelter annual fund to support day-to-day operations.

The need to shelter and care for hundreds of animals who have been abused and discarded is great. Percy Animal Shelter will look to the caring and generosity of the residents of Percy County to support the needs of the county's animal population.

**Call Me for Your
Fundraising
Needs.**



If you need help with writing your Case for Support, developing a sustainable, strategic Fundraising Plan, implementing an Annual Fund, selecting the right CRM for your organization, or facilitating your staff and board Retreat, CALL ME, 602.265.6680 or 602.722.3624. You can also reach me by email: diana@formulaforfundraising.com.

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