



DEVELOPING A CASE FOR SUPPORT

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THE MISSION AND VISION

Nonprofit organizations are formed around concerns or issues when someone or a group determines ways to solve the problem by creating options and opportunities. A mission statement describes that work. It is a concise statement that articulates why an organization exists. The Mission can be thought of as what you do.

The Vision is forward looking and describes where the organization is headed. In drafting a Case for Support the issues your institution confronts and the goals you intend to achieve are conveyed in powerful statements that helps the public understand the importance and value of the work and why your nonprofit should *continue* to exist.

THE ROLE OF THE CASE FOR SUPPORT

A Case for Support offers compelling reasons why the work of a nonprofit matters. It moves beyond the “why it exists” of the mission and provides the reasons an institution should *continue* to exist. The document describes who benefits and how and why the service is of importance to the community. The document reveals the core values of the institution in the description of the nature and significance of each department and major endeavors.

Every organization worth supporting offers something unique. The Case points the direction to your future and justifies your motivation for growth and change and desired stability. Your group may be the oldest, the largest, the most forward looking, or reach the most significant audience, but in the view of the public, only one questions matters--“So What?” And that is the question answered by your Case for Support.

TONE, NEED, OPPORTUNITY, AND VISION

Why do you need the money? Why now? The Case answers these questions in several ways, and one of those is by creating a sense of urgency. Not desperation, but urgency. The image of an organization in distress is not one that will attract donors. Look instead for opportunities to communicate excitement and practical solutions in changing times. Donors want to be part of a success story, so explain how additional funding will allow the organization to excel, not merely survive. The situation has to be compelling enough that donors will want to help you succeed by making the largest gift possible. The intention is to generate enthusiasm in your community and among your donors.



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Explain the programmatic and funding opportunities so that the community understands how they can participate. Does the community see you as affluent beyond belief—are you that big house on the hill with lush gardens and a stream of visitors? Do they view recent contributions and grants as proof of your wealth? Seek language that dispels these myths, conveys needs, and instills confidence?

Honesty and integrity matter. If you are the “only”, the “best”, the “most advanced”, then you have the right to claim that. By the same token, avoid making statements you can’t stand behind. People give to winning organizations not mediocre ones. Be specific about what distinguishes your work.

When a Case contains compelling stories, reflects worthiness and conveys a sense of urgency, it can help attract funding from supporters who see their contributions as good investments.

A PROCESS FOR CREATING THE CASE

Writing a compelling case that reveals the passion behind your Mission is a process that involves some institutional soul searching. Identifying staff and board leaders to participate in this activity will help strengthen the team and deepen understanding of why you are all involved in the work.

INCLUDING THE RIGHT PEOPLE

Bring the right people together to answer these questions. To broaden participation and expedite the process, create an internal task force of 3 to 5 people to guide the drafting process. Participants should include staff and board members and other key leaders. Those participating should have a close connection to the work and be fully engaged in the organization. Management guru, Jim Collins recommends that you consider what would happen if you had to start your organization from scratch on the planet Mars. Who would you take with you? Who are the critical thinkers and big picture visionaries that can help you achieve your goals? These are the people to engage in this process.

Initially, the role of the Case task force is to keep the process on track and assign duties. This group determines who will review the materials and who will be the primary writer. Other details such as design, layout, and selection of visuals may be handled by this group or others. They will also plan how the review process will be conducted and how the Case will be tested.

Typically the programmatic components of the Case are easily identified. A more difficult task for this group is to find the passion behind the mission. Whether they select

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a form or informal process does not matter. They can devise focus groups, surveys, interviews, or more casual groupings to learn from others.

LISTENING

To find compelling statements, listen to those who care about your history and your future including the board, staff, and donors. Listen when they are talking to others about their feelings about your nonprofit, their own work or role, and how they see the opportunities. Ask them: “Why did you initially want to be part of our institution? What attracted you to this place?”

Since the board sets direction, board agreement on the Case and the goals is mandated. Staff also must be aware of and committed to the vision and priorities to implement them. They are also keepers of some of the most poignant stories, and their involvement can offer insights and deepen commitment. Engage them early in this process and use the questions below to test your statements.

- Do the text and stories selected resonate?
- What pictures, quotes, or testimonials match the powerful messages you hope to convey?
- Are the elements urgent?
- What additional ideas and opportunities are important but not urgent? What must be postponed?
- Who else must know our priorities?

THE ESSENTIAL COMPONENTS OF A CASE

Create an outline of all the information you want to include in the Case for Support and a separate list of information that may be used in addition to the Case when approaching donors or educating others about your work. By answering the questions below you can begin your outline.

1. Mission and Vision:
 - What do you do?
 - What major issues does your nonprofit intend to address?
 - Why is this work important?
 - What does your organization hope to accomplish?
 - What is your Vision; your aspirations?
2. History
3. Distinctions

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- What makes the work or its delivery unique?
 - What differentiates your organization from other similar groups?
4. Geography/Economy
- What are the salient local characteristics?
 - How does the geography impact your work? Who you serve?
 - How do you address/incorporate local concerns?
5. Audience/Beneficiaries
- Who do you serve?
 - What are the different types of people in your institutional family?
 - Demographic influences? Diversity? Aspirations and plans for inclusion?
 - Are there distinctive ways you serve specific communities?
 - Who are the beneficiaries of your work? How do they benefit?
6. Goals and Recognition
- What do you hope to accomplish this year (in the next 3-5 years)?
 - How do you plan to reach that Vision
 - How will the new initiative affect/impact/transform the organization and its ability to achieve your mission and serve the public?
 - How will donors be recognized?

CREATING THE CASE COMPONENTS

Shape, Size, and Expense

The Case can be a written document and usually starts as such, but it may take many different forms. It presents agreed upon priorities in ways that your strategic plan cannot. Each organization determines how they can best present their goals in ways that are meaningful to their donors and their audience. It can be a high-end brochure, a simple typed document, an elegant video or a straightforward power point. It may be ten pages or longer, or a one-page personal story that captures the essence of your organization and its work.

More important than the design or how much you spend on materials is the content of your Case. The important thing is to tell the stories you have to tell and convey the messages that will help secure your future. Draft your most poignant stories and important messages and take the space that you need. Whatever format you determine is best for your Case, try to design them for flexibility. Plan for ways to include additional information or insert data that may change.

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Writing Your Case Statement

As you begin to write your Case, tie in the basic organizational facts that you identified earlier. Look for compelling language, stories, and quotes that reinforce your messages. Before you begin, focus your energies on the higher purpose you serve. Consider what void would be left if you closed your doors tomorrow? What would be lost? Who would care? Why? What makes this work valuable/critical?

Bring your own positive energies and outlook to the process as you answer the questions below:

1. What do you do? What issues do you address? Why does it matter?
2. Describe your Vision and the strategies you will use to achieve it.
3. Community Leadership: How does your nonprofit plan to confront the major issues of not only your institution but your community?
4. Uniqueness: What makes this work distinctive? Why are you the best to address your Mission?
5. Audience: Who benefits? How?
6. Geography/Demographics: Describe the community's stake in your success.
7. Public Perception: Are there negative or inaccurate perceptions to correct? What are other outside influences that impact your work?
8. Integrity: What institutional behaviors or systems demonstrate the ways you have earned public trust or demonstrated integrity?
9. Stature: How have you established credibility and built confidence in your ability to deliver? What accreditations or kudos has the organization/staff received?
10. What is at stake? Why should the community care? What might be lost?
11. How will new initiatives affect or transform the community and the organization?
12. Outline the timeline and add any preliminary or critical steps that are necessary to achieve the goals?
13. How will donors be recognized? Are their special benefits?
14. When you have achieved your goal, what will be the visible differences? Impact?
15. What are the most compelling reasons your organization should continue to exist?

The responses you have gathered by asking the questions outlined here will help you start to craft your Case.

OPPORTUNITIES FOR SUPPORT

Next you will match your needs described in the Case with the projected costs. Opportunities are developed to allow others to better understand your work and to participate as donors. For annual fund uses, opportunities for support help supporters recognize the need for contributions. This is often an introduction to the actual costs of

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services vs. the income derived from such things as membership, educational initiatives, and special programs and projects.

1. What specifically do you want and what will it cost?
2. Have you identified departmental needs and linked them to priority goals?
3. What is the overall goal? Is it reasonable? Realistic?
4. Are the priorities clear to all?
5. Are there many levels of support to allow for broad donor participation?

TESTING THE CASE

Although everyone internally may believe the Case is strong and ready to work for you, it is always good to have a process that allows others to review and respond to your Case. This can be a small group of donors or some community representatives. Alternatively, it can be a more formal review that is part of a pre-campaign feasibility study.

USES OF THE CASE

Those who contributed to the development of the Case have been on an exploratory journey that has uncovered the passion behind your mission. Their work should produce a summary that is capable of influencing and attracting others to support your organization and your work. The Case can be of benefit internally as well as externally as the following uses for the Case demonstrate.

1. *Raise Money – for annual operations, foundation, corporate, and individual support, and campaigns.*
2. *Build trust by testing the Case in focus groups, in a pre-campaign feasibility study, or other surveys to learn what interests the public.*
3. *Advocacy – as language to use in power points and as talking points for board and staff to use with guests, at functions, and through community speaking engagements. Make sure that the message of your efforts, your value, and needs comes across.*
4. *Education and Training – training for board and staff including orientation, team building, creating a personal story for their elevator speech*
5. *Promotion and Marketing - “It’s not what you’re selling but what they’re buying.” Are you using the Case in promotion? Has it changed perceptions and commitment? Are the agreed upon priority messages being conveyed?*

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6. *Board Recruitment* – Is the board nominee as interested in your Case for Support as they are in getting their name on the Board roster? The Case is an outline of the board agreement--it is the work outlined in the Case that a new board member is agreeing to support.

CASE STATEMENT SUMMARY

Include Powerful Statements:

- All the things you do that matter
- Compelling statements about your work
- What is your Vision – How will you achieve it?
- Your geographic fit in the community and region.
- Who benefits and why that matters
- Emphasize a strong organization
- Institutional success stories, accomplishments, and testimonials
- Your current situation and aspirations
 - Create a sense of urgency based on real need
 - Project confidence and worthiness - not desperation.
 - Create credibility – accreditation, awards, etc.
 - Demonstrate inclusiveness

For support in developing your Case for Support, contact
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