



Are You Ready to Create Your Case for Support?

A case for support is a key document to share your organization's story.

It allows you to tell your donors what you do, your impact, and your exciting plans for the future. Creating an effective case is critical in preparation for a campaign—and it often clarifies priorities and unifies your leaders around their vision for the future.

More than just facts, figures, and renderings, a case statement must reach *both the heart and the head*. Donors need to understand the needs and your plan to meet those needs head-on with their help. But **WHY** should they care about it—and why now?

Link your strategic goals to the project through the case and show how they will come together to make an impact that donors can get behind. If done

Before you begin . . .

you must be able to answer these five questions:

- 1. Do you have a clear vision for your future?**
- 2. Do your board chair, the CEO/President, and other leaders agree on the top two or three goals for the next five years?**
- 3. Can you clearly describe what will be different as a result of the campaign?**
- 4. If your priorities include a facility, can you show renderings, floor plans, and describe what will happen inside that facility and how it will be sustained once built?**
- 5. Do you have solid, sensible cost estimates for each component?**

If you do not have consensus on these topics, you will need to take a step back to gain clarity before beginning work on your case.

Taking the time to thoughtfully develop a donor-centric case for support will set you up for much deeper conversations with your donors about the future and their role in making that vision a reality.

A case for support should:

- be directed to your donors;
- be founded on sound strategic planning;
- share the unified vision for the future of your organization;
- describe how gifts will make a difference for your organization, the community you serve, and beyond; and
- clearly explain the why of your request in a clear, concise, and compelling way.



What To Include

With a clear vision and solid plans, you are ready to create your case for support.

The Basics:

- 1. Introduce** – Kick off the case with a strong story, quote, or even a few powerful statistics that show, rather than tell, who you are. Support your reason for being and compel the reader to learn more. Be sure to briefly touch on the vision for the future campaign and goal, so the reader knows what is coming up.
- 2. Highlight strengths and opportunities** – Present the key opportunities and challenges your organization faces and how your unique strengths and qualities position you to realize opportunities and address challenges. This is a good place to include mission and vision.
- 3. Detail campaign components** – Share details about your campaign initiatives, including dollars needed, why the initiatives are important (and why now), and costs for each. Capital projects should have details about the features of the space and include renderings if available and a concise explanation of how the capital project will be sustained. Describe operating, endowment needs and how they fit into the campaign.
- 4. Tell stories** – Perhaps most important, include stories and/or quotes that demonstrate impact, that provide the “why,” and build empathy. These can be placed wherever they fit well in the document. Remember, less is more. Keep stories short and to the point.
- 5. Appeal** – Here is your chance to briefly recap the need, highlight how the reader can help, and invite them to join with you in your vision. Reinforce how the future will be different—and better—with their support.

Essential Tips

Engage the head and the heart.

Articulating your vision and plans with key details and facts is essential—but just as important, you must appeal to the reader’s heart. Stories, quotes, compelling photos, and infographics all help to demonstrate the impact of your organization and why the donor should invest in your plans.

Target your donor audience.

The tone should emphasize that “We can’t do what we do without you, our donors.” After all, your donors are investing in your promise, your mission. Your audience for the study likely includes donors who know you well, so guard against overloading your case with background/past achievements and show them how you are changing the world through your important work.

Keep it simple—and brief.

Your case for support should be brief. Your donors likely know you well and don’t need (or want) to read a lengthy document. Photos and graphics can be used strategically to help tell the story you want to tell in an appealing, easily digestible format. Ultimately, the case for support will be the source document for all of your campaign materials.

DISCOVER FOR YOURSELF.

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