



# BUILDING A COMPELLING CASE



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# WORKSHOP OVERVIEW

## I. The Importance of a Case Statement

## II. Make Your Case

I. Gather Resources

II. Outline

III. Draft the Case Statement

IV. Revision, Approval, and Testing

## III. Use Your Case



# WHAT IS A CASE STATEMENT

# WHAT IS A CASE FOR SUPPORT

## Case for Support (Case):

The reasons why an organization both needs and merits philanthropic support, usually by outlining the organization's programs, current needs and plans

– The AFP Fundraising Dictionary

- **The official story of your organization, the cause and how you address that cause**
- **The basis for all other fundraising documents and PR/Communications content**

# WHAT IS A CASE STATEMENT

## Case Statement (External Case):

A presentation that sets forth the case.

– The AFP Fundraising Dictionary

- **Tells a story to your constituents**
- **A shorter, readable, and compelling presentation piece**
- **An essential fundraising and marketing tool**
- **Not a proposal, but the primary element of a proposal when supplemented by other material**
- **Avoid technical language or “inside baseball”**
- **Just one of the documents created from full Case for Support**

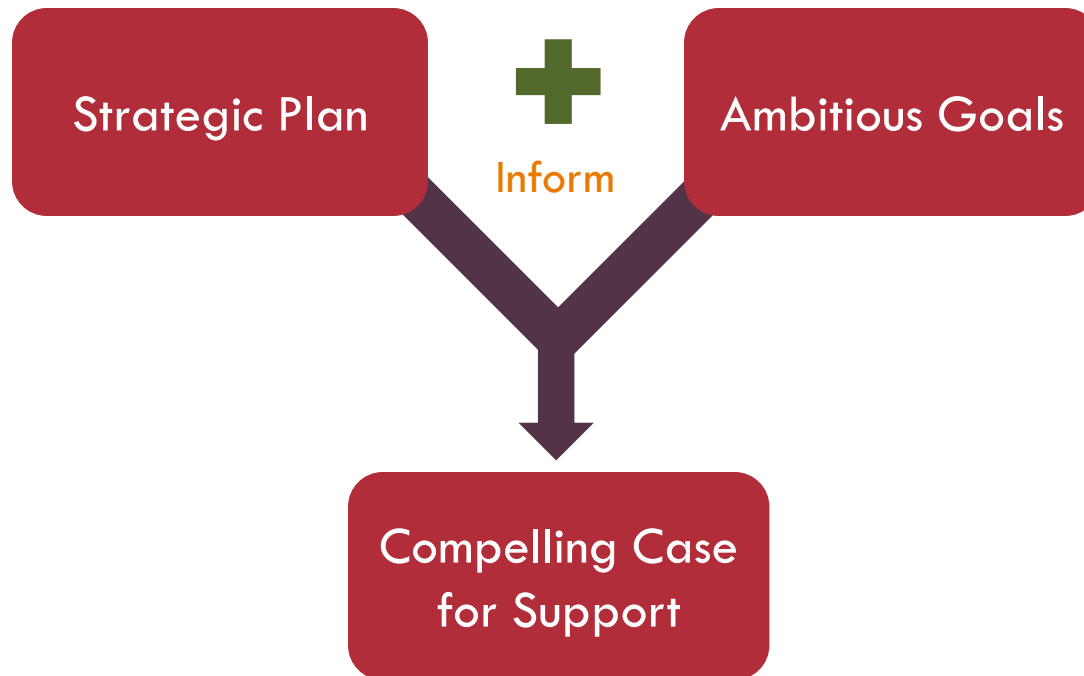
# WHY DRAFT A CASE STATEMENT

# WHY IS YOUR CASE SO IMPORTANT?

- **All fundraising is rooted in demonstrated need**
- **Serves as a single source for compelling language describing all that you do**
- **Allows you to describe on-going programs as more than just “general operating support”**
- **Generates consensus and ensures consistency of message**
- **Justifies your organizations mission and purpose to your donors**
- **Demonstrates the effects of your mission**
- **Lets donors understand how they can help**

# YOUR STRATEGIC PLAN FORMS THE BASIS FOR YOUR COMPELLING CASE

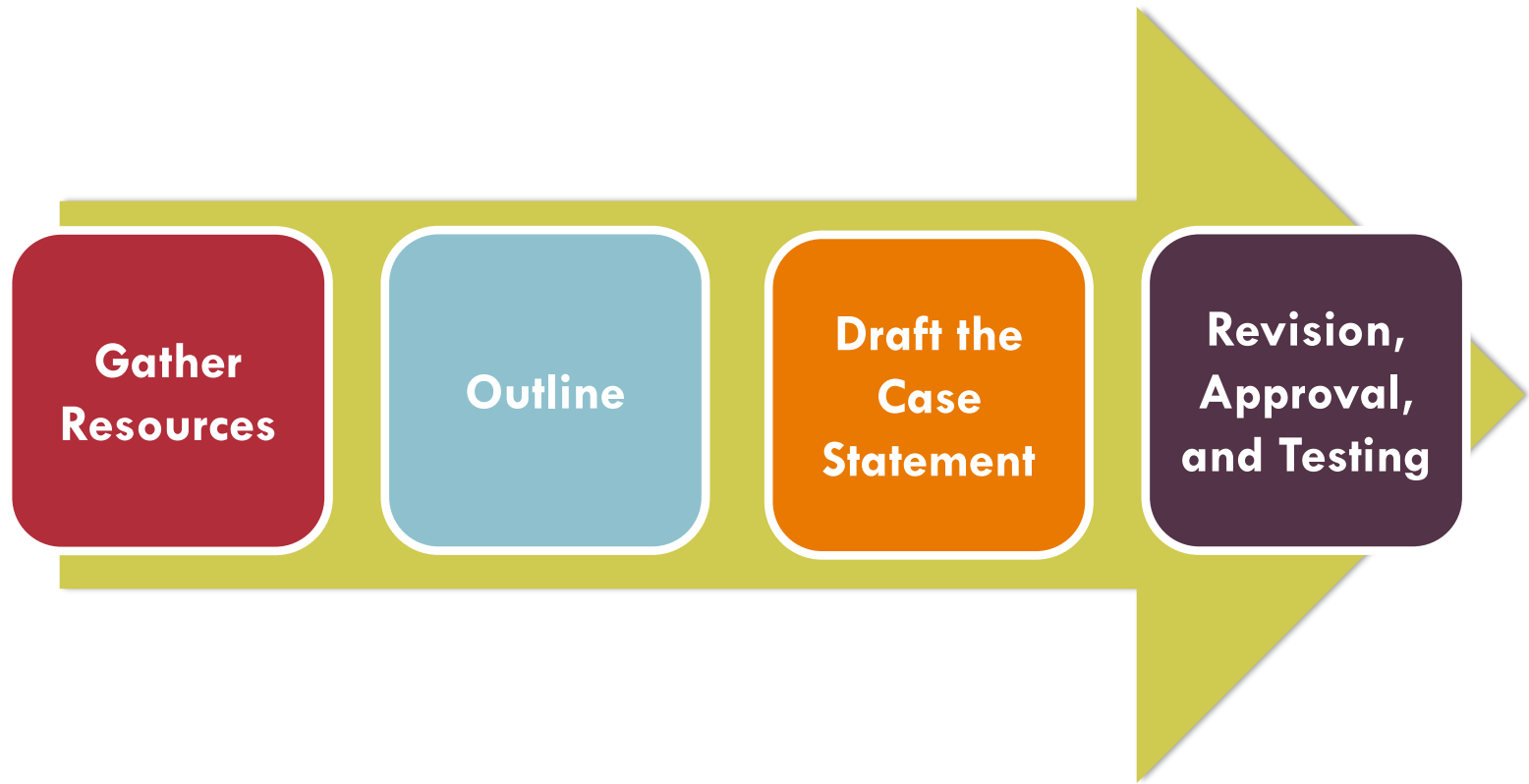
More than a laundry list, a bucket list, or line items in your budget, your compelling case for support draws upon the vision and goals of your strategic plan.





# HOW TO MAKE YOUR CASE

# MAKE YOUR CASE



# QUESTIONS TO ANSWER

Think about questions a donor would ask, in order to make a gift decision...

- Who leads your organization and implements your programs?
- Are you successful in implementing these programs?
- With whom do you collaborate on the solution?
- What unique programs do you offer to address the need?
- Why are the problems and services important?
- What is your philosophy, mission, objectives?
- What is the problem or social need?
- Whom do you serve?
- What is your vision for the future?
- What is your plan to address future need?
- What are your specific financial needs?
- Who supports your organization?
- Who should support your organization?

# GATHER RESOURCES

Case Component	What It Must Articulate	Where to Look
<b>Mission Statement</b>	Awareness of the cause; insight into the problem addressed	Mission or vision statement
<b>Goals and Objectives</b>	The desired achievement that is expected to solve the problem and how it will be achieved	Strategic plan; board policies
<b>Programs and Services</b>	Your organization's service to people (including client stories)	Strategic plan; program planning documents; program staff
<b>Finances</b>	The expenses of providing programs and services as an argument for philanthropy	Budget; audited financials; annual report
<b>Governance</b>	The character and quality of your org. as demonstrated by its leaders	Board listing; board member bios; board policies
<b>Staffing</b>	The qualifications and strengths of staff	Org. chart; job descriptions; bios
<b>Facilities and Services Delivery</b>	Available facilities and mechanics of service delivery – the advantages, strengths and effectiveness of both	Construction or renovation plans; strategic plan; planning documents; program staff
<b>Planning and Evaluation</b>	Program and fundraising plans. Evaluation processes that measure effectiveness	Strategic, program and fundraising plans; budget; hunger study; evaluation documents
<b>History</b>	Story of founders, staff and leaders. Milestone achievements. Credibility implied by historical success	Internal documents; conversations with founder or past leaders

# OUTLINE

- Begin broadly, become more specific
- Illustrate human impact
- Inspire, don't just describe
- Tell a story

Executive Summary

Identify Organization and Mission

Background and History

The Case/Need/Problem

Programs and Services

Results and Outcomes

The Situation Today

Vision for the Future

Financial realities

Inspirational Closing

**Call to Action!**

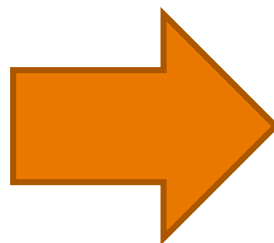
# DRAFT THE CASE STATEMENT

- **Work from your outline**
- **Begin with the narrative for each section of the outline**
- **Take the time to draft the long case first**
- **Expand with relevant, supporting details from your gathered resources**
- **Don't shy away from detail, but keep it focused and flowing**
- **Use bullets, graphs and charts to summarize factual detail**
- **Avoid jargon “metrics”, “poundage”, “agency fees”, etc.**
- **Write the executive summary last**

# EXECUTIVE SUMMARY

## Write it LAST

Identify Organization and Mission
Background and History
The Case/Need/Problem
Programs and Services
Results and Outcomes
The Situation Today
Vision for the Future
Financial realities
Inspirational Closing



- Provides a succinct overview of program
- Be clear and organized – write this last!
- The job of the executive summary is to sell, not just describe
- Should convey all the key points of the full case
- Include what you would say if you had just three minutes

# REVISION, APPROVAL AND TESTING

- **Consider a case development committee**
- **Share an outline early in the process to ensure buy in**
- **Have someone read your draft, that is not familiar with the organization first**
- **Get the draft in the best possible shape before submitting for review**
- **Be patient, this may take several rounds of revision and approval**



# REVISION, APPROVAL AND TESTING

- **Once the case is approved, it should be tested**
- **Ask the opinion of trusted donors and friends**
- **If possible, test across key constituencies**
- **Use feed back to fine tune case messages**
- **Case should be re-tested and revised annually or whenever strategic planning is taking place**

# WHAT TO DO WITH YOUR CASE

# USING YOUR CASE

- **Your approved case is the source and basis for all fundraising and promotional materials**
- **Take your internal case and transform it into communications, PR and fundraising pieces:**
  - Shorter, external case statement
  - Major gift proposals
  - Brochures
  - Foundation proposals
  - Direct mail letters
  - Program “sell” sheets
  - Newsletter content
  - Press releases
  - Website content
  - Volunteer and board orientation

# USING YOUR CASE

- **Transform your internal case statement into a short and compelling external case statement**
- **This can be the core text of a bound major gift proposal or a piece of a solicitation kit**
- **Customize the case statement to your audience**
- **Less factual and more compelling**
- **Easy to read, with bullets**
- **Follows the same flow and still tells the story of your cause, your organization, the need and why the donor should give**

# QUESTIONS



# CONTACT INFORMATION

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