



BUILDING YOUR CASE FOR SUPPORT

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BUILDING YOUR CASE FOR SUPPORT GIZMO

The *Building Your Case for Support* GIZMO (Giving Information for Zooming Mission Objectives) is designed to help you produce your case for support by connecting the right pieces - of the proverbial puzzle - with the right reasons why people would want to support your program. Whether you're starting from scratch or improving upon what you already have, the contents of this *Building Your Case for Support* will help you create the message that generates public response.

The *Building Your Case for Support* GIZMO, consists of two primary categories of learning, the Interactive Tutorial and the Q&A Template. The Interactive Tutorial is a preview of what every case for support needs and why. The Q&A Template is a question and answer guide from which to develop / improve your case for support. You will be prompted to refer to this attached Word document at the completion of Piece # 7.

Interactive Tutorial

Interactive Tutorial takes you through the following steps in “piecing” together your case for support:

Piece i: Tutorial Introduction

Piece # 1: What is the Community / Region Problem that Demands a Response?

Piece # 2: Solution to the Community Problem

Piece # 3: Your Organization’s Response

Piece # 4: Your Program’s Plans for the Future

Piece # 5: Your Organization’s Unique Qualifications

Piece # 6: The Ask and Donor Benefits

Piece # 7: Clear Compelling Presentation

Piece # 8 (attached Word document): Build Your Own Case for Support Q&A Template

Notesheets

Before you start, print out the attached Notesheets document. As you go through the Interactive Tutorial, use this worksheet to capture any ideas for your case development work in the Q&A Template later.

Piece i

Tutorial Introduction:

Before you begin drafting or editing your case for support, this tutorial walks you through the “pieces” that need to fit together in order to create a clear, compelling case for support. It is important to know what a case for support *is* and what *it is not* as described below...

What a Case for Support is

Your case for support is a well written, interesting presentation of the community problems your program addresses and why your initiative deserves support. It provides a “big picture” – 1200 feet above looking down – perspective. It’s motivating, concise and thorough.

As your “core” document, your case establishes the consistent message you will use for all your written and verbal communications. It’s organic – you will want to update your case as your organization evolves. A successful case for support answers prospective donors’ questions before they are asked.

What a Case for Support is not

A case for support is not a proposal. It forms the foundation of a proposal. Proposals are tailored for each funder and each request. A case for support is also not a “statement” about your organization’s needs or a document that includes your entire organizational history.

Another thing it’s not: Dull. Prospects will lose interest if your case is boring ... and will turn elsewhere for motivation to give.

Piece # 1: What is the Community / Region Problem that Demands a Response?

Puzzle piece #1 presents a clean, compelling and complete picture of the problem. Both factual and emotional, this “bad news” piece carries a lot of weight. Spend time presenting the problem, its consequences and urgency. Key questions to answer include:

What is the problem?

How pervasive is the problem?

What impact is the problem having on...?

What will happen if this problem isn't addressed now?

How will you describe the manner in which a single person is affected?

How would you describe the problem in 10 words or less?

Materials / Information to gather

What is the problem?

- What problem exists in your community / region?
- Who is affected by it directly? Indirectly?
- How long has it been a problem?
- What are the underlying causes?

How pervasive is the problem?

- How many people in your community are faced with this problem?
- How many people in your region and state are faced with this problem?
- In the nation as a whole?

What impact is the problem having on...

- Individual health and well being?
- Quality of life for individuals? For families and the community?
- Future generations?
- Our culture as a whole?

What will happen if this problem isn't addressed now?

- What are the consequences today?
- What will they be next year?
- In five years?
- A decade?
- A generation?

How will you describe the manner in which a single person is affected?

- Think about one individual facing the problem and share their story.
- What is his or her name? Age?
- What is his or her family situation?
- What is life like for this person dealing with this problem?
- For the people close to this person?
- What will happen, specifically, if nothing is done to help this single individual?
- What will the ripple effects be for the family? The community? Region?

How would you describe the problem in 10 words or less?

Forcefully summarize what's happening right now and what will happen in the future if things don't change.

Example: *Children who fall behind in school never catch up.*

Example: *The health of seniors who miss doctor's appointments declines significantly.*

Materials / Information to gather:

- Facts regarding the problem and trends in your community
- Case studies
- Statistics related to the problem, and their sources and dates
- Related studies from credible institutions
- Reports, news articles, press releases and other third-party sources
- Online research from similar nonprofits or parent organization
- Interviews with knowledgeable others

Piece # 2: Solution to the Community Problem

Puzzle piece #2 gives a broad-brush, principle-based and do-able answer to the problem. This piece introduces the “good news,” the idea that there is a solution. Key questions to answer include:

What is the fundamental principal at the heart of solving this problem?

What do you envision your program / organization’s broad impact to be?

What is your organization’s solution to the problem?

For what purpose does your organization exist?

How would you describe the solution in 10 words or less?

Materials / Information to gather

What is the fundamental principal at the heart of solving this problem?

Example: *It is immoral to let our neighbors go it alone when their lives have been torn apart by natural disaster.*

Or...

Illiteracy is connected to higher unemployment rates, higher crime rates and a cycle of poverty that suppresses quality of life for generations.

What do you envision your program / organization’s broad impact to be?

- Take a few minutes to imagine that you are floating 250 feet above the place where you provide services. Look down at it from above. Can you see the different people who come and go? Can you see who they are? What makes them the same and what makes them different? Where do they come from and where do they go afterward?
- Can you see what impact solutions are having on their lives and the lives of those close to them? Now float up 500 feet, even further. Can you see how these solutions impact the entire community, the region and state? Can you imagine how these solutions are connected to organizations doing similar work across the nation? Can you imagine the profound impact the solution will have over time?

What is your organization's solution to the problem?

- Is it possible to resolve this problem?
- What can be done, in general terms, to help people facing this problem?
- Complete this sentence: Our program / organization believes we can help people facing this problem by...

For what purpose does your organization exist?

- What is your mission?
- Why is your solution effective?
- What overall improvements have you seen already?
- What will the positive impact be in the near future when your solution is applied effectively? Over the next several years?

How would you describe the solution in 10 words or less?

Include the solution and result, if possible.

Example: *Effective drug prevention education keeps kids from becoming addicts.*

Example: *Learning interviewing skills helps people become self-sufficient.*

Materials / Information to gather:

- All of your current communication pieces
- Your website content print-out
- Statistics or reports from other communities that have had success in solving the problem
- Interviewing colleagues / experts

Piece # 3: Your Organization's Response

This third piece to the case for support puzzle asks you to answer the following questions to describe a strategic response for how your organization delivers solutions with measurable goals and objectives.

How is your organization responding to the problem?

What specific programs do you currently have in place?

Materials / Information to gather

How is your organization responding to the problem?

- What is your current initiative?
- What kinds of programs make up your initiative or strategy?
- Why is this strategy the best way to reach the solution?

What specific programs do you currently have in place?

- Name each program.
- Summarize the program's goal – what will it accomplish?
- List its objectives – what are the specific, measurable steps to reach the goal? How do you know when you've been successful?
- Include number of people served at each location.

Materials / Information to gather:

Detailed information about each of your programs and initiatives, including goals, objectives, number of people served, growth statistics and other results.

Testimonials from:

- Individuals served
- Individuals who have benefited from your services either directly or indirectly
- Community leaders
- Volunteer leaders

Piece # 4: Your Program's Plans for the Future

Use the questions below to describe how your organization's solutions will continue to grow in the future along with the confidence that an investment now will pay off immediately and over the long term.

How does your strategy position you for the next one to three years?

How will your organization continue to respond in the future?

Materials / Information to gather

How does your strategy position you for the next one to three years?

- Can your programs be expanded geographically over the next few years? Serve a wider clientele?
- What are your current plans for improving the programs you have?
- Can your current programs serve as models for other organizations?

How will your organization continue to respond in the future?

- Which additional programs are you developing? Which might you develop with more funding?
- Will you provide additional services? Explore or add social entrepreneurship programs?
- Will you reach out to additional constituencies?
- Will you collaborate with additional nonprofits? Lead efforts in areas in which you do not currently focus?
- How will you continue to have an even greater impact on individuals, the community and the culture as a whole?

Materials / Information to gather:

- Your strategic plan
- Interviews with program directors

Piece # 5: Your Organization's Unique Qualifications

Answer the questions below to build trust that your organization is uniquely qualified to provide the solution for long term success through a combination of talent, planning, governance, experience and other assets.

What is your organization's inception story?

Describe the key decision-makers and directors.

What are your key successes?

Why is your organization unique?

Materials / Information to gather

What is your organization's inception story?

- Who started your organization?
- When did they start it and why?
- What connection do you have to an umbrella organization, if any?
- What was the initial response?

Describe the key decision-makers and directors...

- What experience and qualifications does your executive director bring to your organization?
- How many people are on your advisory council/board? Who is on your board? What are their affiliations? Why are they involved and how much time do they dedicate to your organization?
- Who are your volunteer fundraising leaders? What are their affiliations? What is the level of their involvement and how effective have they been?
- Who runs your programs and what are their qualifications?

What are your key successes?

- List your most recent successes, based on the goals and objectives of each program or initiative. Did they exceed expectations? Did they build on past successes? If so, how?
- In what concrete ways have your successes benefited your constituents? How many people have you served in all? How many people will you serve in the coming year? In subsequent years?
- Who has been the cumulative positive impact of your programs and initiatives over time?

Why is your organization unique?

- What are the three main differences between your organization and others providing similar services? Other differences?
- Why are these differences important?
- How has your unique team benefited people served by your organization?
- How do you collaborate with others?
- How your organization has evolved and improved over time?

Materials / Information to gather:

- Annual reports
- Staff, board and volunteer leader lists with professional affiliations, experience and backgrounds (if applicable)
- Organizational chart
- By-laws and procedural guides
- News articles about your organization or people affiliated with it

Piece # 6: The Ask and Donor Benefits

Puzzle piece #6 explains how to motivate the reader.

How can people help?

How will specific monetary amounts impact those you serve?

What basic benefits will a donor experience by supporting your programs?

What tangible benefits will a donor experience by supporting your programs?

Materials / Information to gather

How can people help?

- What are the different ways individuals, groups and businesses have contributed to your organization in the past? How have these contributions made a difference in the work you've been able to do?
- How, in general, do you spend the gifts you receive?
- How important is it for you to receive gifts?
- What is the cost difference between responding to the problem now versus paying for the consequences later?

How will specific monetary amounts impact those you serve?

- Think of as many examples as you can of specific program costs associated with the following amounts (use those amounts that are most appropriate for your organization): \$5000, \$2500, \$1000, \$500, \$250, \$100, \$50, \$20, \$10 and even \$5 (lower amounts can show how many people can be helped with a large donation).

What basic benefits will a donor experience by supporting your programs?

- How will being part of your organization's solution make donors feel better?
- How will involvement touch his or her life on a personal, family, professional and philanthropic level?

What tangible benefits will a donor experience by supporting your program?

- What tangible items will donors receive? Will they receive newsletters, in-person tours, invitations to special events, recognition, media attention, other “perks” or external benefits?
- How do you keep in touch with donors? How do you report back on the good that their contributions have generated?

Materials / Information to gather:

- Your current operating budget
- Interview with current donors
- Testimonials from: Individuals served, Community leaders and Current donors

Piece # 7: Clear Compelling Presentation

Your responses to the following queries will help make your case for support easy to understand and enjoyable to read from the first to the last sentence.

General Format: What readers expect

Visual interest: Break up your paragraphs

Language: Keep the reader interested

Variety: The spice of writing (and reading)

Turn offs: Some things to avoid

Process

General Format: What readers expect

- Approximately nine pages, if it's a word-processed document
- Wide margins (at least an inch on each side)
- Numbered pages
- Legible font in at least 12 point type
- Divided by interesting subheads in a second font, 14 to 16 point type
- Complete contact information, including names, phone numbers, email addresses, mailing addresses and website. And don't forget your logo!

Visual interest: Break up your paragraphs

- Subheads, testimonials, photos, charts, graphs and bullet points make pages interesting to look at and encourage readers to keep going.
- Include captions that explain what's happening in the photos and what conclusion to draw from charts and graphs.
- Use underlining, italics and bold, but use them sparingly.

Language: Keep the reader interested

- Use concise, urgent language that moves the reader along.
- Use action verbs instead of the verb “to be” (is, are, were, was, been).

Example: *“The organization was founded in 1997 by Mary Jones and Bob Brown” becomes “Mary Jones and Bob Brown founded the organization in 1997.”*

- Tighten up wordy sentences, and get rid of adjectives and adverbs that slow down the story.
- Choose the most important statistics. Too many numbers overwhelm and are hard to visualize. Humanize them whenever possible.
- Write subheads that make a point or answer a question. This is helpful for both skimming and urgency.

Variety: The spice of writing (and reading)

- Vary sentence length. Short sentences interspersed with longer ones add impact.
- Vary sentence structure. Begin some sentences with phrases, some with nouns and others with gerunds (verbs that end in “ing” and act as nouns, such as responding, funding and growing).
- Vary paragraph length. Divide long paragraphs (seven or more lines) in two, and use one-line paragraphs now and then.
- Include a question or two, either subheads to set up your next point or to address what your reader is likely thinking.
- Use transitions between thoughts or to summarize. These include phrases such as: in other words, as a result, in fact, not surprisingly, in addition.

Turn offs: Some things to avoid

- Jargon. Have someone unfamiliar with your organization point out any jargon you may have overlooked.
- Acronyms and abbreviations, if possible.
- Overuse of “we.”
- Boring words than can be easily replaced by energetic more efficient ones. Here are a few examples ... use help (facilitate); prove (substantiate); give (provide), etc.

Process

- Don't worry about getting it right the first time. That's impossible.
- Let your first draft sit for a day or two, then review it with a fresh mind.
- Distribute your revised draft to your team and ask for their input. Don't be put off if they have a lot of edits and suggestions.
- Make revisions and redistribute, possibly to a smaller team, and perhaps during a meeting such as a board retreat.

Congratulations – you've completed the Interactive Tutorial!

Next Step: You are now well prepared to initiate the *Building Your Case for Support Q&A Template* (attached Word document). The Q&A Template is a question and answer guide from which to develop/improve your case for support.

Q&A Template

Piece # 8 (attached Word document): Build Your Own Case for Support Q&A Template

Set aside two weeks to get through the Q&A Template:

- Plan to spend a couple of hours on a single "puzzle piece" each day for seven work days. Some pieces will be longer than others, of course, and continue beyond a single page.
- After you've completed each piece, let it sit for two or three days.
- Then return to it with fresh eyes to revise and refine.
- Once you're confident you've included all the necessary information in its most compelling presentation, just "select and delete" the gold text boxes and Q&A Template questions.
- And, viola! You have a first draft that is ready to share with your team for input, revision, etc.

Now... grab the materials and notes you collected when working through the tutorial and get ready to tell a compelling and important story: **YOURS!**

Congratulations! You now have your first draft Case for Support. Just delete the gold text boxes and Q&A Template copy (from the attached Word document). What's left is a clear, compelling and complete "core" outline that you and volunteers and stakeholders can edit, let rest, and then re-edit some more. Once people have had a chance to "put their fingerprint" on the case for support, your initiative will be ready to use for all of your communication and fundraising efforts.

HELP: The following is helpful information on distance learning opportunities...

CNCS Distance Learning Opportunities

Corporation for National and Community Service is pleased to sponsor the following distance learning opportunities, the Resource & Fund Development Initiative, GIZMOS and the Specific Learning Communities Initiative.

Resource & Fund Development Initiative

- **On-the-Go eTA**
An ebulletin – On-the-Go eTA provides "just-in-time" information, ready to apply in the real world. Timely tips, cool ideas, hot trends, articles and suggested reading lists come directly to you twice a month through this OTG eTA bulletin. Contact LEADline@CampaignConsultation.com to sign up for this free resource.
- **LEADline (Learning Experience At a Distance)**
Need resource development answers quick? Speak to a fundraising practitioner to obtain advice within 8 workday hours. Call 1.877.243.2253 x50 or email LEADline@CampaignConsultation.com
- **Online Fundraising Courses**
Campaign Consultation offers web course delivery of topics pertinent to resource development such as "Funding Challenges Can Work for You," "Business/Good Work = Mutual Benefits," and "Modest to Major Support." Available through The Resource Center at <http://nationalserviceresources.org>.
- **LEAD (Learning Experience at a Distance) Technical Assistance**
LEAD Coaching provides groups of programs, distance coaching and technical assistance to build achievable resource development / sustainability plans. LEAD usually consists of 15 – 20 participants in an introductory webinar followed by 2 individual coaching sessions for each program.

GIZMOS

- Print-based or online, GIZMOS are distance learning tools to help move your mission forward faster. For information on the latest production-line, contact:

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Specific Learning Communities Initiative

- VISTA O-LINC (Online Learning in Networked Communities)

VISTA O-LINC was created to bring together VISTA members, supervisors, sponsor organizations, concerned citizens, community leaders and others to...

- Identify successful community development strategies
- Discover critical resources
- Develop ways to bridge resource gaps
- Cultivate new working relationships
- Plan and implement community building opportunities
- Enhance peer support and
- Learn from each other

- VISTA One Pack

This self-directed learning package is stuffed with information on best practices, strategies and tools for VISTA members and their programs to utilize directly in the field. Organized along a set of research-based and field-tested strategic tactics for building community, the VISTA One Pak provides ready-made information, worksheets, planning tools and resources listed to support the capacity and community building activities of VISTA programs dedicated to alleviating poverty throughout the U.S.

- HAVE (Housing AmeriCorps*VISTA in Emergencies) Report

On behalf of AmeriCorps*VISTA, Campaign Consultation has developed a set of strategies for use by VISTA sponsor organizations to quickly address emergency housing needs for VISTA members. As this report has utility beyond emergency situations, CNCS is currently exploring how the strategies described can be used to address the ever-present housing needs of VISTAs.

- VISTA Ready Kit

Based upon specific best practices and field-tested resources used by communities, both within and beyond the national service community, the VISTA Ready Kit gives VISTAs the necessary tools to work effectively in times of community crisis. The VISTA Ready Kit is currently being distributed to 700 communities nationwide. VISTAs are already benefiting as a result of a dozen being sent to the tornado-affected community of Enterprise, IL.

ABOUT US: Corporation for National and Community Service and Campaign Consultation, Inc.

Corporation for National and Community Service

Created in 1993, the Corporation for National and Community Service improves lives, strengthens communities, and fosters civic engagement through service and volunteering, providing service opportunities for millions of Americans of all ages and backgrounds. Corporation programs include Senior Corps, AmeriCorps, and Learn and Serve America. For more information, visit www.nationalservice.gov.

- National Senior Service Corps (Senior Corps), the network of programs that helps Americans age 55 and older use their skills and experience in service opportunities that address the needs of their communities. Senior Corps includes the Retired and Senior Volunteer Program (RSVP), Foster Grandparent Program, and Senior Companion Program.
- AmeriCorps, whose members serve with local and national organizations to meet community needs while earning education awards to help finance or training.
- Learn and Serve America, which helps link community service and learning objectives for youth from kindergarten through college as well as youth in community-based organizations.

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Campaign Consultation, Inc.

Founded in 1988, Campaign Consultation, Inc. works with individuals and organizations – at the local, state, national and international levels – to advance fund raising, community development, corporate citizenship, diversity, issue advocacy, media & marketing, public policy, and organizational & business development campaigns.

Campaign Consultation, Inc. has extensive experience in helping people acquire the confidence, skills, and resources to design and advance “out of the box” strategies for goal achievement. Since 1998, Campaign Consultation, Inc. has trained more than 18,000 participants, through its services as the training / technical assistance provider for all areas related to resource gathering for the Corporation for National and Community Service. Campaign Consultation is currently providing technical assistance for the Resource and Fund Development Initiative and the Specific Learning Communities Initiative.

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