

PREPARING A CASE FOR SUPPORT

Simply put, the “Case” is the reason for a campaign. In a compelling way, it makes the argument of why and how prospective donors should contribute to the organization and what will be made possible by their giving. It may take the form of a printed brochure or packet, and/or a video, CD or DVD.

Long before someone begins to write the first draft of the case statement, the nonprofit’s leadership must explore the very heart of the organization and the direction it must take. Specifically, they must

- ❑ Understand what makes the organization unique
- ❑ Review what the organization has accomplished and why it is deserving of gift support
- ❑ Revisit the mission statement and if necessary rewrite or revise it
- ❑ Describe the vision of the organization that is held by its leaders
- ❑ Select what opportunities have highest priority for the realization of the mission
- ❑ Create a story by finding compelling themes that reflect the impact new gifts will have on the mission and the campaign’s ability to achieve its goals
- ❑ Determine how the organization will hold itself accountable

That being said, the case for the organization’s project should be BIGGER than the organization itself. Consultant and author Jerold Panas gives the following superb example of how he learned this important lesson. (From “Dream Weaver” by Jerold Panas in the Nov-Dec 2002 issue of *Contributions Magazine*.)

His firm was asked to raise funds to restore Franklin Roosevelt’s presidential yacht, *The Potomac*. This yacht had great historic value and had received visitors such as Churchill, Eisenhower, the Queen of England and Roosevelt’s War Cabinet. They prepared a traditional case statement describing how the yacht would be brought back to pristine condition and included architectural renderings of each level of the ship. They thought the case statement materials were a knock-out. However, as Panas puts it, “prospects were underwhelmed.”

It was a potential donor who gave them the clue. “You folks don’t have this right at all,” he said. “It’s terrible. This program isn’t about the restoration of a not-too-pretty boat. It’s about FDR. It’s about an exalted President, but it’s really about the Office of the President. It’s about the most exciting, dynamic and fearful period in this nation’s history.”

They rewrote the case. The new one was full of photos of FDR. There were reprints of some headlines that were followed with the dateline: *From the Presidential Yacht Potomac*. They went into the archives of the FDR Library and found photos of some world leaders with the President. This time, they included only ONE photo of the yacht!

The revised case told a compelling story and was a big hit. It became quite clear that donors were giving to the Office of the President. The restoration of the yacht was simply the way for them to do so.

Make your dreams bigger than your organization. Tell stories, and give them breadth and depth. Show your donors how they can be a part of your dreams, and they will enthusiastically come along with you.

LIST YOUR IDEAS ABOUT THINGS YOU WANT TO BE SURE TO INCLUDE IN YOUR NEXT CASE STATEMENT:

What makes your organization unique?

PREPARING A CASE FOR SUPPORT

What has your organization accomplished? Why is it deserving of gift support?

How does your organization benefit the whole community?

What impact will new gifts have on the organization's mission and its ability to change lives?

What is your organization's clear vision or dream for the future? Is it compelling, and will this campaign help you get closer to achieving that vision?

PREPARING A CASE FOR SUPPORT

What is it you want the reader or viewer of your case statement to do? How you want them to do it? Does your case statement tell them?

How will your organization hold itself accountable for using donated funds for the project for which they were requested, and how will you let donors know?
