



## *The Marketplace Perspective*

### What Makes Your Case Credible?

Together with sufficient prospects and volunteers, a compelling case for support is generally considered indispensable to a successful capital campaign – or any other major gift fundraising activity. Most experienced fundraisers can easily give you a clear definition of the case for support. But, ask someone to define what makes the case for support compelling and you’re likely to get a different answer each time.

Many think of the case as a public relations tool—a way to package and sell the institution and the campaign. The case **does** provide the basis for your campaign brochure and audiovisuals, and it **does** need to have an emotional impact. In the realm of philanthropy, however, “sizzle” may be overrated.

**Donors are more often interested in your mission and vision than your current “list” of wants and needs.**

In fact, if the following elements are present, your case will have the desired emotional impact—without relying on clever slogans or purple prose.

1. **The marketplace perspective.** The audience for the case consists of current and prospective donors and volunteers. It must therefore be

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## *Emphasize the Process for a Better Product*

### Use Your Case to Win the Campaign

When it’s done right, the process of developing the case for support can be as valuable as the finished product. Poorly executed, the process can become a nightmare.

What makes the difference? With all of the experience our firm has accumulated, we are still learning how best to manage this process in the most constructive manner—and that could be the subject of a much longer article. Here, we can briefly summarize some of the advice we currently offer our clients.

1. **Use outside counsel.** Assigning the project to an outside expert gives you the benefit of counsel’s experience and knowledge, as well as a fresh perspective. As a rule, it is much easier for counsel than it is for staff to think and write from the viewpoint of potential donors and volunteers—the actual audience for your case.

**Before you start to write your case for support, you must complete your external/strategic planning.**

2. **Do your homework.** This should be self-evident, but often is not. Before you can develop the case, you must complete your strategic planning. Without organizational consensus on the future direction of the institution, it will be difficult to effectively present the specific objectives of the campaign. If the campaign includes capital projects, do you have site plans, floor plans, and costs? Will funding come from other sources (e.g., reserves or cash flow)? And if so, how much?
3. **Be prepared to provide information.** To prepare an effective presentation, counsel needs to know what is actually going on inside your institution – financially and otherwise. Only with that knowledge can they do an effective job of advising you on how

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## 8 Elements of an Effective Case for Support

When the time comes to review the first draft of the case, what should you look for? Based on our experience, an effective case for support should:

1. Maintain the *donor's perspective* and reflect the values, interests, and aspirations of prospective donors and volunteers.
2. Build upon the *strengths, accomplishments, and capabilities* of the institution, rather than its deficiencies or needs.
3. *Position the institution* in the minds of prospective donors as a distinctive asset to the community and region.
4. Present the campaign and its objectives as an *investment opportunity* that will produce a substantial return in the form of benefits to those served by the institution.
5. Go beyond the institution to advocate for the *cause* that the institution represents.
6. Provide the *facts* required to support its claims.
7. *Stimulate* a positive emotional response (in the same way as an effective speech) and a call to action.
8. Create a sense of *urgency* by helping to convince prospective donors and volunteers that the campaign goal must be achieved on schedule.

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written from their point of view, and not the point of view of the institution. And frequently, these leaders are more interested in fulfilling the mission of the organization and its vision for the future than its current shopping list of needs.

2. ***The right facts, presented in the right context.*** Our donors and volunteers are sophisticated people who serve on nonprofit boards, understand how institutions work, and know what questions to ask. We need to give them straightforward and credible answers. If the facts are effectively presented, they will speak for themselves.
3. ***The endorsements of known and respected people.*** Equally essential to a credible case are testimonials from leaders who are held in high regard by our audience. If these leaders are known to support the campaign, many others are sure to follow their example. A brief and thoughtful quote may be worth more than pages of facts.

**A brief and thoughtful quote from a respected leader may be worth more than pages of facts.**

4. ***Effective face-to-face presentation.*** The written case, or even a well-produced video, cannot do the job alone. The essence of the case must be presented to prospects, in person and with conviction, by your CEO and campaign leaders. As the saying goes, "People give to people." That is how the case achieves its emotional impact.

The case does not function in a vacuum, but in the context of an intensive campaign, driven by a trained and dedicated corps of volunteers. The prospect will not be persuaded to give because of the case for support you left with them to peruse at their leisure. They rightfully expect your volunteer solicitors to look them in the eye and state the case with passion and conviction, in their own words!

There is a school of fundraising leaders and practitioners who rely heavily on packaging, promotion, and high pressure to carry the day. We prefer to rely on the intelligence and civic spirit of our donors and volunteers. It is those qualities to which the case should appeal.



## Use Your Case to Win the Campaign

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best to make your case to the donor community, and answer the questions that are sure to be asked.

#### 4. **Involve current and prospective donors and volunteer leadership.**

The case must be written from an external point of view – so get out of your office and ask for input and advice. Include the personal testimonials and endorsements of the campaign and its objectives in the case document. Through their participation, donors and volunteers are more likely to take ownership of your case and the campaign.

#### 5. **Manage the review process.** The development of the case is only part of the larger process of campaign planning and preparation. As a general rule, counsel will also be working to draft the plan of campaign, identifying potential donors and volunteers, organizing the campaign office, and completing critical key campaign planning efforts.

It is important that both staff and volunteer leadership buy in to your case; therefore, they must participate in the review and approval process. But that process must not be allowed to become the exclusive focus of your efforts, distracting everyone from other important tasks.

The size of the group reviewing the case should be limited to a few key staff (such as your CEO, CFO, and program director) and volunteer leaders such as your board chair and/or foundation board chair, and the chair of your campaign planning committee).

**The essence of the case must be internalized and articulated effectively, face to face.**

The purpose of the process must be understood. It is not to produce “copy by committee,” but to ensure that the case is sufficiently clear, compelling, and effective to do its job for the campaign.

The case will function as a resource document and a tool for volunteers and staff. It will provide the basis for other campaign communications. Most importantly, however, the essence of the case must be internalized by staff and volunteers, and articulated effectively to prospective donors, face to face. That is how to use the process of writing your case to win the campaign!



### A Word About “Needs”



*“... if only the donors understood how much we **NEED** more money ...” ?*

In drafting your case and communication materials there is one word that is used too often — NEED.

When preparing your case for support, you must assume that your organization has no needs.

**Successful organizations identify problems in their community** and demonstrate how donors can join their team to find solutions. They do not focus on their needs!

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## *On Second Thought*

# Use Your Donors to Write the Case

by Lori Overmyer, Executive V.P.



We've said this before, but it bears repeating: the donor's perspective is essential to the case for support. When you initiate the preparation of your case, you should involve key members of your organizational family and your best donor prospects in the process. In doing so, you are not only working to identify the unique perspective of your organization through your donor's eyes, but also maximizing a prime cultivation opportunity.

Remember that the perspective of the development director or chief executive is very likely different from that of the community, and specifically from those who will be asked to contribute significantly to your organization's future. You will gain a wealth of information about the marketplace perspective through research and speaking directly to your donors when drafting your case. Further, these conversations create the opportunity to authentically engage your board and best prospective donors early in your planning process.

Go out into your community. Conduct interviews and work to ascertain how your organization is viewed externally. The perspective you will gain is more akin to how current and future major donors perceive your organization and its services.

In conducting this research, it is also vitally important to maintain a keen focus on your unique donor constituency. What will be the size of the reading audience of the case for support? How many people comprise your donor constituency? The greater your familiarity with your constituency, the more effectively the case will speak to them as well as for them—and the more precisely it can articulate a vision that will resonate with them and motivate their giving and advocacy.

More often your case for major gifts will comprise a total constituency of several dozen rather than several hundred. In researching and composing the case, we emphasize that it should be written to avoid the lowest common denominator. The major gift donor constituency tends to be more sophisticated and accustomed to a less sensational, more straightforward writing style. We have learned that a clear, concise, and objective document can best be written by a third party, such as a fundraising consulting firm that has experience writing from the donor's perspective.

