

**ANNUAL CASE FOR SUPPORT OUTLINE:
WHAT YOUR DONORS NEED TO KNOW ABOUT YOU...
...AND WILL NEED TO KNOW EVERY YEAR**

Build in a ritual with your board to update your story every year

--By Sonya Campion, Trustee, Campion Foundation, 2013--

What a case statement is: A place to collect the strongest points for supporting your organization in one consistent, updated form to build ownership within the organization as well as the ability to build on all external messages to increase your positioning in the community.

What it isn't: A glossy brochure...it may grow into one, but start with a powerful story first and test every section (not a long narrative) to see if it is the best you can do.

CASE STATEMENT OUTLINE

Introduction: This has to convince me to want to read the rest. Briefly state who you are, why you exist, your vision and proof that someone cares with a quote or compelling quote or testimony from a key stakeholder.

1. The Bigger Picture of your Relevance: What's happening in the issue you deal with?

"Donors give to organizations because they meet needs, not because they have needs." Kay Sprinkel Grace, Beyond Fundraising

Your donors expect you to be the conduit for your issue. They expect to learn and stay updated about the community through you: Educate them on what you are seeing in the part of the community you work in: For example - an increase in homelessness, regional differences, demographics. With the information overload, your role as a filter and interpreter for your donors is more important than ever.

2. What evidence is there that this is a pressing need?

Make it clear that the need is now, and that it needs to be addressed soon. Include surveys, expert opinions, or statements from the beneficiaries.

3. So what? What is your vision?

A vision is your description of what the community will have if you accomplish your goals. It is the higher, aspirational, inspirational reason you exist and should lead all of your communications. Fred Hutchinson Cancer Research Center incorporated their vision directly into their mission statement: "The mission of Fred Hutchinson Cancer Research Center is the elimination of cancer and related diseases as causes of human suffering and death. The Center conducts research of the highest standards to improve prevention and treatment of cancer and related diseases."

4. How are you uniquely qualified to tackle this need?

What is your niche in the community ecosystem? Describe your history concisely enough to present you as uniquely qualified to tackle the need.

5. What are you doing about responding to the need: What's changed – for better or worse

Connect your strategic plan and goals to your work this year. Report back on your goals, objectives, successes and challenges. Your donors are partners with you...be honest about what's working and what's a challenge and where you are going. Oh, and remind me of the urgency of achieving your vision too.

6. What's at risk and what will be the benefits of your action?

If you take action now, what will be the positive consequences, both major and minor and what are the negative consequences if you fail? Sometimes this is the strongest motivator for donors, so lay out clearly the major and minor negative consequences if you do not act.

7. Leadership: Do you have the horsepower to be effective?

Description of leadership should include brief resumes, but not a vanity piece for the organization. It should show that you have the right people on the bus and the perfect combination of people and talent for the job. And most importantly, it should convey proof of the passion, commitment and dedication of the Board of Directors with evidence of 100% giving, volunteer involvement and advocacy for the organization.

8. Financial Strength:

Hey, if you want my money (and this goes for any donor), convince me you will treat it well and manage it effectively. Convince me you have a plan for the next few years that is reasonable and based on solid research and most importantly, financial management, planning assumptions and strategies that are truly owned by the board.

9. What do you need and why? Why should I think about giving more?

*This is where we get into the case for philanthropy: don't assume we donors understand how your business is run. Explain the flow of resources into your organization and the difference philanthropy makes. **Make a case for the donor to increase their support by defining what increased giving from the private sector allows you to do.** Be specific about the roles of restricted, special funding (capital, projects, etc.) and the benefits of unrestricted funding from philanthropy in your ability to serve the community.*

10. Remind me that I am part of a community of donors that can make a difference....that you need me.

*Your donors gifts are expressions of community leadership....remind them of that.
Example: "Out of 2,000,000 people in Puget Sound, there are only 400 of you who are stepping forward to ensure that children can go to school and not worry about where they are sleeping that night. That they will have the security of a home and the consistency needed to build confidence and the ability to learn. Our government support helps secure an address for our families, but philanthropy makes it a real home. We need every one of you. Please know that your philanthropic choice to invest in our organization is changing a child's life right now."*

Good luck. Your donors are counting on you to tell your story in a compelling, consistent and powerful way so that they can transfer a whole lot more money to you than you are currently asking for. And more money = more mission = more community benefit for all of us. As Martha Stewart would say, "It's a good thing."

Sonya Campion, 2013