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The Case for Support

Defining “Case for Support”

“Case for Support” is one of the most amorphous terms in fundraising. Different people within your Action Coalition might interpret the case for support as your mission and vision, a list of giving opportunities, a donor’s motivation for making a gift or the actual words on the pages of a brochure or appeal letter. In many ways, it’s all of the above; these are all expressions of an organization’s case. But the confusion surrounding the term can make it challenging to know whether your Action Coalition is heading in the right direction in defining and sharing your case with supporters.

It is often most helpful to think about the case for support as having three distinct phases or expressions:

- **Case for Support:** Fundamentally, your case for support is the rationale for why a donor might support your Action Coalition and the opportunities you provide for them to give. The case answers the core question, “What do you *offer* your donors?” The answer to this question should ideally be twofold:
 - What do you offer your donors as an *organization* meeting a need that they care about?
 - What *opportunities* do you offer donors to achieve their goals (i.e. giving opportunities)?

The case for support is less about a tangible *product* and much more about the *process* of defining the answers to these questions within your Action Coalition.

- **Donor Messaging:** Your donor messaging is how you position your case for support to appeal to donors and potential donors. The core question that defines your messaging is, “What do you *say* to supporters to inspire them to give?” Your messaging can take the form of talking points, FAQs or a more formal case statement (see subsection below), but these are internal, meant for your board or other fundraising volunteers and any staff at your Action Coalition. These are not yet products that you would put in front of a donor or prospect.
- **Fundraising Communications:** Your fundraising communications are the final expression of the case for support, answering the question, “How do you *deliver* your message to your donors and potential donors?” This includes both the *materials* you share with external audiences (such as a brochure, website, appeal letter or video) as

well as the *strategy* used to share these materials (in-person meetings, presentations, email, mail, social media, etc.).

In short, you can think about the continuum of the development of your case for support as shown in the graphic on the following page.

The sections that follow present tips and steps for moving through this continuum, from defining your fundamental case to sharing communications materials with donors and prospects.

Stage	Case for Support	Donor Messaging	Fundraising Communications
Core Question	What do we <i>offer</i> our donors?	What do we <i>say</i> to our donors?	How do we <i>deliver</i> our message to our donors?
Process	<i>Defining</i> your rationale for support and opportunities for donors to give	<i>Articulating</i> your case in a compelling way	<i>Sharing</i> your message to motivate action
Types of Products	<i>Internal reference materials:</i> <ul style="list-style-type: none"> Value proposition Giving opportunities Case outline 	<i>Internal reference materials:</i> <ul style="list-style-type: none"> Messaging platform Talking points Case statement? (See below) 	<i>Communications strategy</i> <i>External, donor-ready materials:</i> <ul style="list-style-type: none"> Print: Brochure, appeal letter, grant proposal Digital: Website, video, social media, email, presentation

The Role of the Case Statement

Should your Action Coalition write a case statement?

It's an important question and doesn't come with an easy answer. Like the case for support, the case statement is an often-misunderstood part of the fundraising process.

The general understanding of a case statement is a lengthy, narrative document that lays out, in great detail, the many reasons a donor might support an organization, the ways that support might be used and the anticipated impact of that support. Case statements tend to be comprehensive, serving as a "source document" for developing any type of fundraising material or addressing any question or objection you might anticipate from a potential donor.

As a source document, however, the case statement is intended for internal use only, and that can make it challenging to understand its primary purpose and how you might go about using it.

Pros and Cons of Developing a Case Statement	
Pros	Cons
The process of <i>developing</i> a case statement can help ensure that an organization doesn't skip the essential step of defining the fundamental case for support before writing the case statement.	Organizations often believe that <i>writing</i> a case statement is the same as <i>developing</i> a case and they skip straight to writing without first defining the case for support.
Many volunteers believe they need a case statement before they can go out and raise money.	This belief can keep volunteers from fundraising during the often-lengthy case development process. Because the case statement is internal, it is often not the donor-ready tool that volunteers are expecting. Other materials, such as talking points, can "arm" volunteers just as well.
The comprehensive case document provides ample source material for other fundraising collateral.	Because of the pressure for it to support a wide variety of materials, the case statement can easily become unwieldy, further adding to confusion about its purpose. A "messaging platform" can provide similar guidance for collateral without requiring as much time.
	The process of writing a case statement can be quite time intensive and is particularly difficult to keep on track without dedicated staff.
	The process of writing a case statement often falls into one of two traps: a single person writing alone and producing a document that may not resonate with others, or a writing-by-committee exercise that results in a lengthier process and inconsistent or "watered down" final product.

As this grid illustrates, there are benefits to producing a case statement, particularly when it brings discipline to your process of defining your case for support. But many of these benefits can be achieved through simpler means.

The exercise of developing a case statement may well be fruitful for your Action Coalition. If you have a dedicated staff person or a volunteer with a talent for writing who can commit significant time to shepherding the process, it may be a productive way to tackle the tasks of both defining your case for support and articulating your donor messaging. If, however, your staff and/or volunteer resources are strained, consider aiming for a messaging platform or set of talking points instead of a full case statement.

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Worksheet: Recruiting a Case Team

Because defining the case for support requires examination of your current work and your future plans, it is important to involve core leaders throughout the process, including individuals from various aspects of your Action Coalition’s work. To keep the process from bogging down, consider recruiting a core working group of approximately 6 individuals, while offering opportunities for others to weigh in through one or two larger group discussions, email “polls” and/or a “preview” of materials as they are developed.

While you should structure a process that makes the most sense for your Action Coalition, the working group generally should expect several discussion-heavy meetings, some “homework” between meetings and reviews of documents, with some individuals play more intensive roles. Ideally, those that you recruit will remain involved through the creation of your fundraising communications, ensuring that you have continuity as your case evolves from discussion to donor-ready materials.

Use the space below to define who you plan to recruit to help guide the case development process.

Constituency	Core Working Group	Others to Engage in Process
Staff (if applicable)		
Co-leads		
Board, advisory group or similar group		
Pillar workgroup members		
Development/fundraising volunteers		
Other		

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Who will lead the working group, facilitating meetings and guiding the process? _____

Who will capture and share discussion notes? _____

Who will serve as the primary author of key documents? _____

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Worksheet: Developing Your Case

This worksheet is designed to help your Action Coalition define its case for support—the fundamental rationale for why a donor might support your work and the opportunities you provide for them to give. The result of this step of case development is less about the product and more about the process. You might end up with a written value proposition or a formal menu of giving opportunities that will be helpful in later steps—but the most important outcome is the critical examination of your Action Coalition’s work and vision for the future, as well as the buy-in, ownership and enthusiasm the process can build among your Action Coalition’s key leaders.

Stage	Case for Support
Core Question	What do we <i>offer</i> our donors?
Process	<i>Defining</i> your rationale for support as an organization and the opportunities for donors to give
Types of Products	<i>Internal resources, which could include:</i> <ul style="list-style-type: none"> • Value proposition • Giving opportunities • Case outline

All members of your case working group should participate in completing this and subsequent worksheets. This can be accomplished through individual “homework,” one-on-one conversations during group meetings or full group discussion. You might also consider submitting select worksheet questions to others you would like to engage in the process prior to your working group discussions.

Defining Your Audience and What Matters to Them

It’s important to ground your case for support—and all of the messages and materials that flow from it—in an understanding of your audience. At a basic level, your audience is your current donors and funders as well as those individuals and institutions you believe may have an interest in supporting your Action Coalition. Getting more granular, your audience could include a variety of constituents and stakeholders, from your volunteers and nurses throughout the state to insurers to retail clinics and foundations committed to improving health care in the communities you serve. You might even include your governmental bodies such as your state

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legislature among your audience if you receive government funding to support your work, or if you hope to in the future.

Asking who your audience is is really another way of asking who your prospects are. Fill out the chart that follows with descriptions of the types of supporters and potential supporters you would consider the audience for your case.

Who is our audience?	
Individuals	
Corporations	
Foundations	
Other	

Different supporters will be motivated by different aspects of your case. The table below shows some of the common motivations that inspire donors and funders to give. Next to each motivation, note the types of supporters from your list above who you believe would respond to this type of message. You can link a group of supporters to more than one motivation; for example, nurses in your state may be motivated to give both because they feel like a part of the movement and because they care passionately about the issues your Action Coalition addresses. For some motivations, you may not have any supporters who match, meaning this aspect of your case will likely not be important to emphasize. Add any other core motivations that you believe apply to your supporters at the end of the chart.

Core Motivation	Examples	Which audience(s) will be driven by this motivation?
Vision	Being part of an exciting idea or initiative “Investing” in social change or defined outcomes	

Loyalty	Supporting a respected leader or friend	
	Supporting a respected institution or group	
Identity	Connecting to or supporting like-minded people	
	Being part of a community or movement	
Issue	Advancing a cause, mission or passion	
	Making the world a better place	
Gratitude	“Giving back” as thanks for own success	
	Giving others “like me” the same opportunities	
Self-Interest	Supporting a cause that helps self/friends/family	
	Advancing own profession or industry	
Social or Personal Gain	Receiving public recognition for philanthropy	
	Gaining access to a socially desirable group	
	Receiving financial benefit for gift (i.e. taxes)	
Other		

It is worth noting that the motivations listed above do not include a number of items that organizations commonly believe are a core part of their case. In general, donors are **not** motivated by the following:

- **Your Age:** Whether an organization has been around for 1 year or 100, most donors are giving because of your vision for the future, not your longevity as an institution. Milestone anniversaries can be used as a way to rally donors around a specific initiative, but there must be more behind the case than a milestone. Similarly, your Action Coalition might note that “in only 5 years,” you have already built a strong presence and had a powerful impact as a way to demonstrate your accomplishments and momentum. Used appropriately, this “credentialing” is an important part of your case, but ultimately, donors

will be more motivated by what you plan to do in your next 5 years than what you did in your first.

- **Your Accolades:** Most donors are not motivated by awards or recognition you have received. Again, these can be noted as a way of legitimizing or credentialing your Action Coalition, but they are not the heart of your case.
- **Your Needs:** Donors give both to fulfill their own philanthropic needs and to meet the needs of the people and communities you serve. Rarely are they inspired by cases that focus on an organization's internal needs (such as a staff position, technology or a facility); rather, they are motivated by what that investment allows your Action Coalition to achieve in meeting the needs of others.
- **Your Advancement:** Few donors give to an organization purely to make it a leader in the field or more visible in the state. Instead, they are motivated by how your own advancement as an organization will better position you to fulfill your mission.
- **Your Internal Goals:** Your strategic plan, internal priorities and the dollar amount you attach to your fundraising goal are not why your donors give. They give because of how you will enact your plan and priorities to serve your mission, and how you will use philanthropy to help achieve that.

As the points above demonstrate, even at the earliest stage of your case development, you should be considering how to frame your Action Coalition's case in a **donor-centered** way that speaks to donors' motivations and interests, rather than your own needs and internal priorities. This becomes increasingly important as you articulate your donor messaging and prepare your fundraising communications but will be most successful if your case development is rooted in this philosophy of donor-centeredness.

Defining Your Case as an Organization

The case for your Action Coalition as a whole is about defining your value proposition—the unique role you play in tackling the challenge of empowering nurses to improve health care in an era of monumental transformation. There are various ways you pursue that goal through the different pillars of your work, but for the purposes of this exercise, try to define the answers to these questions at the highest possible level.

- What urgent need or challenge does our Action Coalition seek to address? _____
- Why should prospective donors care about this issue? _____
- How does our Action Coalition address this challenge? _____

- Why are we the best organization to take on this issue? What is unique about us? How have we demonstrated success? _____
- If a donor cares about this issue, why should he or she give specifically to us to make a difference? _____
- What is the overall vision and plan for our Action Coalition? _____

Defining Giving Opportunities

Before many donors will give to your Action Coalition, they will want to understand how you plan to use their gift to advance your mission. Defining your giving priorities is a process of determining how philanthropy can help you maintain your existing work, and ideally how it can help you enhance and/or expand your work. Giving priorities may include support for specific **programs or initiatives** (including the cost of any staff involved in those programs) or **capital investments** such as technology or facilities that enable you to better carry out your mission. Giving opportunities should align with the vision and plan for the Action Coalition.

Use the tables below to brainstorm how philanthropy for specific areas of your work can help your Action Coalition move toward its vision for the future. Use the back of the sheet for more room or more priorities.

Programs and Initiatives			
Giving priority			
Is this program in existence or a new proposed initiative?			
Briefly describe the program			
Approximate annual cost			

What need does this program meet?			
How are you meeting this need today?			
How will you better meet this need in the future with donor investment?			
For current programs, how is this funded now? Would philanthropy maintain current levels or expand the program?			
For new programs, how will this program be funded, including philanthropy and other revenue sources?			

Capital Priorities (facilities, equipment, technology, etc.)			
Giving priority			
Briefly describe the investment needed			
Approximate cost			
What need will this help meet?			

<p>How are you meeting this need today?</p>			
<p>How will you better meet this need in the future with donor investment?</p>			

Next Steps

Based on the work above, your Action Coalition should be equipped to develop a simple case outline that includes the answers to the core questions in defining your organizational case as well as a list of giving opportunities. The outline is less about having a polished product and more about capturing the notes and decisions from the processes above. This outline will help advance your work in developing your donor messaging (see next section).

Special Considerations

Subsequent materials will deal with questions about making a case for general operating support for your Action Coalition (as opposed to a defined giving opportunity) as well as making the case for an Action Coalition that is closely aligned with the state nursing workforce center and making the case for endowed funding.

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Articulating Your Donor Messaging

Your donor messaging is when you begin to translate your case into donor-ready language that will be the foundation for your fundraising communications materials.

Stage	Donor Messaging
Core Question	What do we say to our donors?
Process	<i>Articulating your case in a compelling way</i>
Types of Products	<p><i>Internal reference materials:</i></p> <ul style="list-style-type: none"> • Messaging platform • Talking points • Case statement?

Defining your case is typically the part of the process that requires the most “hands on deck.” As you move to articulating your donor messaging, it is often best to have one or two individuals with writing or marketing backgrounds to lead the creation of messaging, checking in with the working group to get input and feedback along the way.

What is messaging?

“Messaging” is best described as a simple assertion of a single essential idea. This does not mean that your donor messaging contains only one idea. What it means is that your messaging is a series of straightforward statements that build on one another as a way of expression your case. To better understand how messaging differs from the more typical language we often see in fundraising, consider the following examples:

Description	Goal	Typical Language	Messaging
Simple	Be direct, make every word count and avoid jargon.	As a nonprofit organization, we rely on the philanthropic support of our donors to	Only you can make our work possible.

	advance our work.		
Assertive	Take a position or state a belief.	Our Action Coalition helps nurses build the skills they need to become leaders in a changing health care environment.	We believe nurses have the power to transform health care.
Singular	One idea, not a full explanation	We are advancing projects that address the most critical needs in the nursing field, that have an impact on the largest scale, and that have the potential to be replicated in other states.	We are focusing on the work with the greatest power to change the future of health care.
Essential	Focus on what really matters—the details will come later	Healthcare reform is bringing a new focus on prevention, community health and access to care. These issues are at the core of our work and our mission.	The future of American health care depends on the future of nursing.

Using the case outline, or language from your website or existing materials, select several key statements and reframe them according to these principles:

Goal	Existing Language	New Messaging
Simple		
Assertive		
Singular		

Creating Strong, Donor-Centered Messaging

The following tips will help you craft messaging that is compelling and donor-centered.

- **Include people:** As much as possible, make sure that people are reflected in your messaging. Rather than talking about your state needing exceptional health care, say that you believe *everyone* deserves great health care.
- **Start strong:** You can always dial back the tone or assertiveness of a message if you need to based on input from the case working group and other key leaders. But it's significantly harder to "punch up" a weak statement than to tone down a strong one.
- **Select strong verbs:** Showcase your work through active verbs. Avoid weaker verbs like "help to" that put your work in a supporting role. Don't rely on adjectives to convey your message, and limit their use as much as possible.
- **Avoid jargon:** Imagine you are writing for someone unfamiliar with the nursing world. Rather than explaining the importance of "scope of practice," focus your message the impact of expanding access to care for more Americans.

A Simple Messaging Platform

A straightforward messaging platform only needs 4 to 6 strong statements. The details to fill out those statements will come as you develop your fundraising communications. Use the construct below to develop a first draft of a messaging platform for your Action Coalition, keeping in mind the points from above.

What you want to convey	Your message
There's a problem in our state.	
This is why we are the right organization to address it.	

Here's how we plan to address it.

Here's how that will change things.

But it depends on your support.

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Creating Fundraising Communications

Your fundraising communications build off of your messaging to put your case for support into final, donor-ready form. Your materials are important because they carry your message to your potential donor. But they're also important because they can keep your Action Coalition organized and "on message," and they can give you confidence in sharing that message.

Stage	Fundraising Communications
Core Question	How do we <i>deliver</i> our message to our donors?
Process	<i>Sharing</i> your message to motivate action
Types of Products	<p><i>External, donor-ready materials:</i></p> <ul style="list-style-type: none"> • Print: Brochure, appeal letter, grant proposal • Digital: Website, video, social media, email, presentation

Purposes and Tips for Materials

There are a variety of types of fundraising materials that you could produce to share your case with donors and prospects. They all serve somewhat different purposes and can make different impressions.

Material	Purpose	Tips
Presentation	<p>Harness a speaker's passion and knowledge</p> <p>Facilitate a conversation with a small group</p>	<p>Think visually, with minimal text—the slides should support what the speaker is saying, not mirror it</p> <p>Use a flipbook version of a presentation in a one-on-one donor conversation if you don't have other print materials yet</p>
Print Package (brochure, fact sheets on specific projects)	Create an emotional connection through design and high-level messages	<p>Each of your key donor messages should be easily identifiable to someone skimming the brochure</p> <p>Use sidebars, infographics, pull</p>

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Appeals (Mail and Email)	Provide the “rational” case through a closer read	quotes and other side content to keep from resorting to heavy blocks of text
	Provide a snapshot of the emotional and rational case Motivate immediate action	Focus on your key messages to avoid lengthy appeals Provide an easy and immediate way to act (donation link, reply device)
Website	Explain how philanthropy makes a difference Present your vision for the future	Interested donors can explore all parts of your website to learn about what you do; make sure your giving page clearly explains the impact their gifts will have and the role philanthropy plays in the vision for your Action Coalition

Prioritizing Materials

Creating materials requires an investment of time and resources. With your working group, determine what materials you should prioritize to best support your Action Coalition’s fundraising work.

Material	High Priority	Medium Priority	Low Priority
Presentation			
Print Package (brochure, fact sheets on specific projects)			
Mail appeals			
Grant proposal template and standard language			
Email appeals			
Website (new/updated giving section)			
Speeches/talking points			
Other			

Creating Your Materials

In creating fundraising communications, it is often worthwhile to make the following investments if you don't have a volunteer or staff member who is skilled and experienced in these areas:

- **Writing:** Translating your case and your messaging into donor-ready drafts—and then getting those drafts through review and revision with your working group—takes considerable talent. Consider a freelance writer, and if possible, try to engage them early in the case development process so that they have the benefit of hearing from your working group along the way.
- **Design:** Good design makes the difference between a message that hits home with a key prospect and one that gets buried amid competing content. Review the portfolios of several freelance designers with your working group and select one whose aesthetic matches what you are looking for.
- **Photography:** Photography is often the most significant part of a prospect's first impression of your materials. Investing in high-quality photography, whether stock images or originally produced, is highly recommended for donor materials.