

GROWING PHILANTHROPY WORLDWIDE


***“Winning their hearts
and wallets”***

A Case for the case for support.

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Mahoney State Park
AFP Nebraska

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The Case for the Case

- Connects with prospects and volunteers
- Tells your story, taps the passion
- Shows you are smart and well managed
- Defines your need and solution
- Invites involvement, investment

What makes it good?

A strong case is part . . .

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Heart-tugger
Business plan
Brand extender
Organizational overview
Motivator, reinforcer
Confirmer, justifier
Confidence builder

The Case for the Case

- Focuses on benefits – not features
- Stresses difference gift will make . . . and for whom
- Proves you are a smart investment
 - Solid plans, vision
 - Solid history, present
 - Solid management, leadership
 - Fiscal responsibility

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Target Audiences

- Typically major prospects and leadership
- Typically used as cultivation leave-behind
- A smaller version works fine for public phase

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More than a fancy booklet

- Core document for all campaign communication
 - Campaign video
 - Grants and requests
 - Talking points for solicitations and speeches
 - Web site
 - Direct mail
 - Newsletters, etc.
- Get words, style approved and you're set

Don't be fooled...

- Fundraising is a form of sales and marketing
 - The case for support is a sales tool
 - Develop, design and use accordingly
- But remember . . .
 - A case, in and of itself, rarely raises a single dollar
 - People, armed with a case statement, raise money
 - The case cannot replace solid fundamentals of fundraising, only supports them

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Covering the Case

- Pay special attention to the cover
 - Sets theme, design standards and expectations
- Clean, attractive, inviting
- Professionally designed
- Reference campaign and organization

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So what's inside?

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- Throughout: Benefits, not features
- Introduction: Sets stage; makes first ask
- Mission, vision: Sets standards, values
- Brag sheet: Highlights strengths, victories
- History: Recalls legacy, tradition
- Need defined
- Solution explained

So What's Inside?

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- Campaign budget breakdown
- Statement of nonprofit status
- Campaign leadership; good stewards
- Beneficiary quotes, profiles
- Leadership quotes and/or letter
- Call to action, thank you

Keep this in your back pocket

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- Board of Directors
- Campaign leadership
- Designs and drawings
- Ways of giving
- Named-gift opportunities, updated
- Newspaper articles
- Pledge card

19 Tips:

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1. Tell your story with passion, focus
2. Be brief but not Spartan
3. Get pros to write and design; proofread
4. Quote and feature those who will benefit
5. Quote high-profile volunteers/leaders

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6. Include successes and highlights
7. Package as appropriate for your audience
8. To stand out, don't be typical
9. Reflect your brand and standards
10. Use pictures, graphs, illustrations

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11. Stay flexible through insert pocket and updates
12. Mention your sound management; 501(c)3
13. Use real numbers, real justifications
14. Respectfully encourage/invite investment
15. Don't forget the pledge card or other device

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16. Show genuine appreciation, humility

17. Thank those who have given, those who will

18. Be proud, enthusiastic; let it show

19. Gain buy-in from Board Chair, Board, Executive Director, etc.

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Questions and Answers

Thank you.



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