How to Write an Amazing Fundraising Plan and Case for Support for Your Non-Profit

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Week #2: Writing a Compelling Case for Support
Introduction
Welcome to How to Write an Amazing Fundraising Plan and Case for Support for Your Non-Profit week #2!

In Week One, we talked about the importance of your non-profit case for support (also called a “case statement”). We also looked at which non-profits need written case statements and how they are used. In this module, we’re going to look at the statement itself… including interviews, what concepts should go into your case for support as well as the actual process of writing the document.

In the words of renowned copywriter, Jules Brown, ‘A good case study demonstrates in an emotive and vivid way an individual’s experience and how the organization has helped him or her.” It is where all good fundraising begins -- the stronger your case for support, the stronger your fundraising plan, and fundraising materials.

As you read through the class materials and bonus guides, if you have any questions about what you are learning or how it applies at your nonprofit, please don’t hesitate to email me at joe@thefundraisingauthority.com I’ll get back to you with answers and ideas as soon as I can. Now, let’s get started…

Conducting interviews

“Once I like to listen. I have learned a great deal from listening carefully. Most people never listen.”

Ernest Hemingway

Now that you’ve gathered your materials together and asked yourself some key questions about your organization’s work, it’s time to conduct some outside interviews.

I can hear you now: “I know my organization better than anyone! Why do I need to do any interviews?”

One of the biggest issues with nonprofit communications lies in their intense, almost dogged internal focus. In their book, Made to Stick, by Chip and Dan Heath, they explain this theory well with a phrase called the “curse of knowledge.” The idea behind the curse of knowledge is that when we know a subject very well, we have a hard time imagining what it is like not to know it. You see it in the way that nonprofits use jargon no one understands but them, and cite statistics no one would care about but them.
Who should you be interviewing? Who has the best stories about your organization? Perhaps your founder and members of your program staff? Is there a donor who has been with your organization since its inception? Think about interviewing more than one donor. You don’t need to interview 70 people to write an effective case statement, in fact, the fewer the better.

The question of who you will be interviewing will depend on large measure with the work of your organization. For an educational organization, I interviewed two past students, two student’s parents, a board member, a teacher’s parent, three teachers, the receptionist/office manager, a member of the program staff, and two donors.

As you’re interviewing, keep an ear out for what I call “emotional hook” statements. For example, contrast these two sentences:

“Let me tell you about...”

vs

“I want pink balloons at my funeral.”

Which of the two sentences above captures your imagination and makes you want to read further? The first is a standard story lead I’ve seen used many times. The second is from copywriter Jules Brown’s appeal for a children's home-based hospice service. The quote came from a little girl named Una who knew she was dying. It’s simple and heart-rending...and you want to read further.

Your goal is a case statement that will engage outsiders. The good news is that we're all looking for a reason to care. These days, we're all so busy, our brains are so bombarded with technology and interruptions that we welcome an opportunity to slow down and really become engaged in effective storytelling.

The bad news is, you’re probably not a professional writer. In fact, if you’re the ED or DD of a small nonprofit organization, chances are good that in addition to your job title, you’re also performing the roles of major gift officer, event planner, grantwriter, prospect researcher, database manager and chief cook and bottle washer!

As you conduct your interviews, be ever vigilant for that one emotional, heartfelt, tear-jerking detail. I have a quote posted above my desk from copywriter Indra Sinha as a reminder:

"Don't start by writing. Start by feeling. Feel, and feel passionately, and the emotion you feel will come through the spaces in between the words."
What brings a tear to your eye? Was there something someone said that made you laugh out loud? Capture it to include in your case statement.

Your job during this process has far less to do with the questions you ask as with your skill as a listener.

7 Key Items to Include in Your Case Statement

As you lay out a plan to write your case for support, it is important to know which ideas and items should be included in the statement. Here are the 7 key concepts which need to be included in every case:

#1: An Emotional Opening

Donors and prospects will use the first paragraph or two of your case statement to decide whether or not the rest of the document is worth reading.

Use your opening to pack an emotional punch. Avoid the temptation to start with something like, “Our organization was founded in 1942 by…” and instead start with something like, “Michael was hungry, desperate, and alone, until he found us.”

#2: Your Mission and Vision

Why does your organization exist? Why should people care? What is your big, bold vision for the future?

#3: History of the Organization

Give a brief summary of the founding of your organization and a short history of its work to date.

#4: Explanation of Your Programs

Tell the reader what programs you are currently running. Give a short explanation of each.

#5: Outcomes and Proof of Impact

Show proof that what you are doing is worthwhile. Use statistics and charts, but more importantly, tell the stories of those you have helped, use testimonials, and then back those up with the numbers.
#6: Financial Needs

How much money does your organization need to raise? Why does it need to raise that amount (what will it be used for?) Why do you need to raise it now?

#7: Means of Support

Give your reader different ways to support your efforts. Do you have a leadership giving program? Annual giving campaign? Planned giving opportunities? Briefly spell those out here.

Generally, these parts can be included in any order. Thus, while the emotional opening has to come first, if for some reason you think an explanation of your programs should come before the history of your organization then write it that way. The case statement needs to be coherent and make sense for your organization, so don’t get wedded to any one formula.

Likewise, some organizations may find that they need to add additional parts. That’s fine too. Just don’t go overboard. Your case for support is not a “kitchen sink” document… you don’t need to include every little thing in it, just what matters for compelling a donor to get more involved.

The Process of Writing Your Case for Support

Every non-profit I have ever worked with has had a different process for writing its case for support. Some take far too long and set up multiple committees to write and bless the project. Others are far too flippant, and write the case statement almost on a whim. For most organizations, though, I have found the following basic process to be the most effective:

1. Select a Writer

It is important that the organization select one person to “own” the writing process for the case statement. Don’t have different people work on different parts, it almost never works in producing a coherent case for support. Select one person (generally from the staff or an outside consultant) to write the case statement.

2. Determine the Stakeholders

Next, figure out which stakeholders are going to have input into the case for support. These are the people the writer will work with to gather information and ideas for the draft statement. Generally, organizations include some staff members, board members, and often some clients of the organization in this category.
3. Gather Information

The writer should then talk with each of the stakeholders to (a) get their take on the mission, vision, programs and other key concepts for the case statement, and (b) to collect data that is needed on things like outcomes, financial needs, etc.

4. Write a First Draft

At this point, the writer creates a first draft of the case for support.

5. Revise the Draft

The organization then holds one or more rounds of revisions by circulating the case statement to the stakeholders that were selected to get their thoughts, ideas, and comments. The executive committee of the board should also be involved in the revision rounds.

6. Vote to Approve the Case Statement

It is my strong suggestion that every organization has its board of directors vote to approve the final version of the case for support, to ensure that the entire organization is behind the final document and understands its importance to the organization.

How Long Should This Process Take?

I’ve heard lots of horror stories from non-profits that took 6 months, 12 months, or even longer to craft their case for support. I believe that taking this long to work on the case statement is unnecessary and counterproductive. It stems from the belief that the writers and stakeholders need to walk on egg shells in creating the document because if its importance to the development of the organization.

The case statement is important, but it is no good to you if it isn’t written. In my view, the entire process of writing your case for support from selecting the writer all the way through approval by the board should take no more than 3 months, and can be completed in as little as 1 month if your non-profit is ambitious.

Remember the Goal of Your Case

The most important thing to remember when creating your case for support is the ultimate goal of the document: to case a vision for prospects that is so compelling that it convinces them to make a gift. If your case statement accomplishes this task, then it is doing its job.
Next Steps

Did you complete Worksheet One from last week’s module? Have you reviewed Joe’s Sample Case Statement?

This week, begin scheduling your interviews and preparing your first draft of your case. Remember, if you’d like feedback on any of your work, feel free to email Joe your completed copy for review and comment.

Remember, too, the wise words of author Stephen King:

“The scariest moment is always just before you start.”

See you next week as we begin creating your fundraising plan.