

How to Run a Successful Planned Giving Program at Your Non-Profit

By Joe Garecht and Pamela Grow

Module #2:

Developing Your Planned Giving Case for Support

Introduction from Pamela Grow

Welcome back to How to Run a Successful Planned Giving Program for Your Non-Profit!

In last week's module, Joe Garecht covered the fundamentals of planned giving, including what planned giving is, why it matters, and how to launch your first campaign. Have you watched the recorded webinar training, *How to Launch and Market Planned Giving at Your Non-Profit*, with Joe and Michael Rosen, CFRE, yet? If you did, you learned that there couldn't be a better time than now to begin your planned giving program. You also learned that bequest giving dollars account for more of overall giving than corporate funding. Making this time to focus in on your program is smart fundraising!

This week's module will cover developing the case for support for your planned giving program.

Remember that all of the materials in this class are pre-recorded. That means that you don't have to be in front of your computer at any set time to access any of the guides, webinars or podcasts. Plus, you have lifetime access to all the materials, so you can go at your own pace.

Throughout this entire class, Joe and I are here to help. As you read through the class materials and watch the webinars, if you have any questions about what you are learning or how it applies at your non-profit, please don't hesitate to email Joe at joe@thefundraisingauthority.com, or me at pamelagrow@simpledevelopmentsystems.com and I'll get back to you with answers and ideas as soon as I can.

What is a Case Statement?

What, exactly, is a case for support?

"We're just starting out. We don't have any plans for starting a capital campaign any time soon. We just want to do some planned gift fundraising. Do we really need a case for support for our planned giving program?"

The short answer is yes. If you plan to raise planned gifts from your donors, your organization needs a compelling case for support. To put it simply, your case for support is the core document that sits at the very center of your fundraising plan and communication strategies. Your **general case statement** tells your potential donors what you need money for, and what the benefits will be if the donor gives to your cause. Whether you're in your first year of operation -- or your tenth, you need a persuasive case for support. If you have a case for support but it was written a few years ago, chances are it can be strengthened. As your organization thrives and grows you'll be creating a number of marketing and communications pieces for your

organization -- from appeal letters, to press releases, to web copy, to your grant proposals, and of course, to your planned giving program. You'll want to ensure that they will all stay on target by creating a strong case for support.

If your case for support is weak, your fundraising will suffer.

Your non-profit also needs a **planned giving case statement**. This is a document that cast a compelling vision for planned gifts at your organization. It focuses on your charity's long term vision, mission and goals. It talks to donors about the legacy they can create for themselves (and for your organization) if they make a planned gift to your non-profit. It is positive, upbeat, and forward-looking. And it talks *specifically* about the benefits of making a planned gift to your organization.

Note that we are using the terms "case for support" and "case statement" interchangeably. They both refer to the same thing.

How long?

Your general case for support will be between 4-10 pages. Your planned giving case for support should be a similar length.

That being said, don't worry about going even longer. You can always pare back the amount of information that is included in donor materials. For example, you may write a 14 page case for support and decide to include the entire thing in your major donor portfolio, but pare it down to a two to four-page document for your planned giving program.

Don't make your case for support too short, however. If your case statement is only three pages long, it is highly likely that you are missing compelling and pertinent information.

Your Case for Support Should Cast an Emotional and Compelling Vision!

Simply put, your case for support is a document that tells donors who your organization is, what it has accomplished in the past, outlines your vision for the future, tells the donor why your organization's vision matters and why the donor should care, and gives the donor a chance to get involved by making an investment in your non-profit.

If that's still too wordy, I'll try to boil it down even further: **Case statements cast a bold vision for a better future, and invite donors to get caught up in that vision.**

Great case statements include a mix of both emotionally compelling stories and descriptions of the work you're doing, as well as cold, hard facts that back up your claim to be a positive force in the world.

Your case statement will answer these questions your donors have about your organization:

- Who are you?
- Why do you even exist?
- What sets you apart from other nonprofit organizations doing similar work?
- What do you want to accomplish? Why does it matter?
- How do you intend to accomplish it?
- How will your organization hold itself accountable?

Your First Step

I will not go into a story unprepared. I will do my homework, and that's something I learned at an early age.

-Ed Bradley

Begin by creating your “Case for Support” file. Gather together the following items (don't be concerned if you're missing some of these items):

- Your mission and/or vision statement
- Your history and accomplishments
- Any brochures, newsletters, magazines, grant proposals (both successful and unsuccessful), appeal letters, previous case statements
- Proof of impact. This might include statistics, outcomes reports, letters from grateful clients, testimonials, quotes from experts who have worked with your organization, surveys, etc.
- Descriptions of all of your programs and services
- Your annual budget and an annual report, if you have it
- Any newspaper articles, press releases, interviews, etc.
- Resumes of key staffers

Once you've gathered your materials together, download Worksheet One, found at the end of this module.

The Questions You Need to Ask

In his book, *How to Write Fundraising Materials That Raise More Money*, Tom Ahern writes:

“Ron Arena (of Marts & Lundy, a national consultant to capital campaigns) taught me his minimalist three-question approach to making a case. Simply answer three questions:

1. Why us?
2. Why now?
3. Why you (the prospect)?”

In many respects, drafting your case for support really is that simple. Let’s go over Worksheet One (available for download at the end of this module), step-by-step:

What Is Your Cause? Why Do You Exist?

1. What problem exists in your community that needs to be addressed? Can you put a number on it? If your non-profit didn’t address the problem, what would happen? How much worse would it get? Remove your organization from the equation here and focus on the community. Write your answers in narrative format.
2. Who is your competition? Are there organizations in your community doing the same work? Answer this question honestly. If there are organizations doing similar work, what sets you apart? Why are other solutions inferior?
3. Why now? Why is your nonprofit a reason for a donor to take action?
4. What is it about your organization’s solution to the problem that makes it the best?
5. Why should the donor care? Why should someone give you money?

This is where your proof of impact comes in. A good additional exercise, one that I use often with clients, would be to imagine that your agency has disappeared overnight. Poof! Your programs are gone. What will your community miss? Who, if anyone, would take up the slack?

Write it down!

Next Steps

Most fundraising professionals understand what a case for support is and already have one sweeping case statement. Determine who is best qualified at your organization to create your **planned giving case for support**. Remember: persuasive, inspirational writing never comes from a committee. While it’s important that leadership, board and staff be vested in developing your case for support, it’s equally important to remember that too many cooks spoil the broth.

Remember, your planned giving case statement needs to be focused on the future. It needs to be focused on creating a legacy for your non-profit for the next 100 years. Why should a donor care about the success of your organization, even after they have passed away? It's not a macabre question, it's something that you need to carefully think about if you want your donors to not only be willing... but *enthusiastic* about remembering your non-profit in their will.

Ask yourself this question: what amazing things will our non-profit be able to accomplish in the future if our donors leave us major bequests? What good could we do in the world if someone left us \$1 million in their will?

Conducting Interviews

"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.

I learned this lesson well during my stint as a program associate, and then communications officer, for a regional grant-making foundation. It was common for grant proposals to leave all of us scratching our heads and questioning each other, trying to figure out exactly what it was a particular organization did. Years later, when I became a grant writing consultant, one of the ways I cut through the jargon was to always run the first draft of a grant proposal by my best friend since childhood. She's a crafter and has never worked for a nonprofit. So, when she gets back to me and demonstrates a clear understanding of what the organization does (bonus points if she feels a strong emotional connection), I know that I've done my job.

Your planned giving case statement should summarize, in an emotional and memorable way, why your organization needs and deserves planned gifts. Earlier I asked you to imagine that your organization had disappeared overnight. Now I want you to imagine what your organization could do with an abundance of planned gifts. What if a donor died and left you \$20 million in her will? What kind of change would that make possible? Capture it in a headline!

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? Ideally you have donors who have left you a legacy gift. What is their story? You don't need to interview 70 people to write an effective case statement. There are definitely instances where the fewer, the better.

The question of who you will be interviewing will depend in 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 (imagine all the calls they're fielding on a daily basis), a member of the program staff, and two donors.

As you're interviewing, keep an ear out for what I refer to as "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 in fundraising materials. 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-wrenching...**and you want to read further.

As I was interviewing for the educational organization I referenced earlier, I spoke with a graduate of the program. She was about to graduate college and in the process of applying for medical school. She spoke of her parents, who had emigrated from Jamaica before her birth: "They've supported me in everything I've done but they've never been to college." That simple

sentence encapsulated our programming with middle school kids who had fairly stable home environments, but little by way of outside support.

Your goal is a case statement that will attract planned giving prospects. 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 any opportunity to slow down and really become engaged in effective storytelling.

The bad news is that you're probably not a professional writer. In fact, if you're the executive director or development director of a very 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 it does with your skill as a listener. Still, if you struggle with the questions (or awkward pauses), in the Resources section of this guide, I've included a link to copywriter Lisa Sargent's Open-Ended Questions Tip Sheet for Advanced Interviewing. It's a terrific guide for moving your interviews forward. Be sure to download it.

7 Key Items to Include in Your Planned Giving 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 seven 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, “What will your legacy be?”

#2: Your Mission and Vision

Why does your organization exist? Why should people care? What is your big, bold vision for the future - and why would your donors care? Again, think of what your organization would do with a multimillion dollar bequest gift.

#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

Highlight your planned giving program.

Generally, these parts can be included in any order. So, 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 Planned Giving Case for Support

Every nonprofit I have ever worked with has had a different process for writing its planned giving 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, the following basic process will 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, as 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 nonprofits that took six months, 12 months, or even longer to craft their planned giving case for support. Taking this long to work on the planned giving 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 of 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 planned giving case for support, from selecting the writer all the way through approval by the board, should take no more than three months, and can be completed in as little as one month if your nonprofit is ambitious.

Your case for planned giving should indicate ways your organization will remain dynamic in the next decade, and the difference bequest gifts would make to your cause. Think donor-first: how will legacy gifts meet their goals?

Your planned giving case for support should tell your donors why the world needs them to leave a legacy after they have gone... by ensuring that your non-profit will be able to continue its work for years to come!

More Resources

[The Case for Support Worksheet](#)

[Open-Ended Questions Tip Sheet from Lisa Sargent](#)

[Case for Support Checklist](#)