



Articles

This download is adapted from the book *The Influential Fundraiser* by Clare Segal and Bernard Ross (Wiley, 2008).

Making your case

The ideas below are designed to help you shape your fundraising proposition — often expressed as a *case for support* — and make sure it is organised for maximum impact on the prospect or donor. Although the focus is on written cases, the same principles apply to anyone preparing for a one-to-one meeting, drafting an email, or shaping a PowerPoint presentation.

What is a Case for Support?

A case for support is the core document explaining how supporters — prospective or present — might support your fundraising strategy. It explains to potential supporters what you need money for and what the benefits will be to the beneficiaries, if donors help your cause. A case is often written by an external consultant, or sometimes one or more members of your team. There is some data to suggest that having an external person to write your case is useful — it gives you a more objective assessment of your ideas and their impact. Either way it should be designed to engage *internal* and *external* stakeholders in your work or campaign.

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A case is powerful and effective if it is:

- a clear, widely owned and understood vision of what is to be achieved
- a defined and costed list of the resources needed to achieve that vision
- aimed at a cluster of donors who have the potential to meet the expressed need

Once written, the case is often used as the source for other communications such as brochures, proposals, presentations and even speeches at events. It will therefore form an important part of your fundraising toolkit.

Who is it for?

For your case to be successful it needs to appeal to a number of different stakeholders. (We're using *stakeholder* to describe the range of parties and individuals involved and interested in your organisation.)

Cases are often thought of as just for *external* stakeholders — donors or prospects, in particular. But they need to address *internal* stakeholders too. So the person who answers your switchboard might not appear to be very important in the great scheme of things. But the way they respond to prospects calling in could make a massive difference to your success. So the case should impact on internal stakeholders — including that vital person who answers the phone — on how to respond to donor queries and challenges.

Different stakeholder groupings have different needs and concerns. Sometimes these needs and concerns are not directly about the cause itself — but about how they can get involved, what you expect of them and what they expect of you. For your case to have influence you need to ensure your case answers these questions.

Challenges with cases

In our experience there are three key problems in the way many cases are currently written by fundraisers:

- *They're too internally focused*: many cases we've read are obsessed with the organisation's internal concerns — “we need a new administration block” — or use a technical hard-to-understand language that is inaccessible to anyone not in the know. By not focusing enough on the needs of the beneficiaries or the concerns of the donors, they become self-referential or even indulgent.

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- *They're too long:* 50 pages of detailed and costed development opportunities with specified outcomes in Excel will probably fail. That doesn't mean a one-page summary will necessarily succeed. But ideally the proposition should be capable of being expressed as a simple one liner – one good example might be Oxfam's *Make Poverty History*. Making your case simple is not the same as making it simplistic.
- *They're too fixed:* many supporters and major donors especially don't want to be given a finished plan to simply fund. They want to be involved in its *development*. So you need to create space for them to contribute, and be prepared to add in their ideas. So a Case should first be a draft when shared with prospects or donors. This engagement can even form part of your fundraising strategy.

There's no one right way to develop a case. It will end up existing in *several* forms – a longer version with detailed data and analysis, and a shorter pithier one that encapsulates the central idea. For example, we wrote a 30-page document for a disability charity in the UK covering five sophisticated 'vision propositions' for people with the disability. It was a cogent, careful case mostly aimed at foundations and institutional donors. The work took several months – and drew on the experience of focus groups and interviews with staff, users and other stakeholders. The result was a detailed, closely argued case backed by a robust budget. Then one day we had an urgent call from the Campaign Director. We met with her in a coffee bar the same afternoon. She needed something different. Together we wrote the six-line version she wanted for a key networker to use at a reception for potential individual prospects being hosted by the Prime Minister at a No. 10 reception that evening. This version was the equivalent of a movie studio elevator pitch designed to raise 'big money' from an investor between floors 3 and 7.

=mc case framework

A case should be translated not just into different forms but also into a *series of differently targeted messages* designed to reach a variety of donors and supporters with different preferences. At =mc we've developed a framework to help you do this which we've used successfully with many of our customers – from a gallery raising \$50M for a Renaissance painting, to an international children's charity raising \$500M across 27 countries to provide education for children in conflict zones.

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The framework assumes that all cases can be based around two psychologically dimensions:

- **Time:** whether the outcome will happen *now* or soon or at some *future* point
- **Impact:** whether it will work *towards* a positive result or *away* from a negative one

If you put these dimensions together in all the possible combinations, you have four choices that can be put in a matrix:

	Present	Future
Positive	<i>Opportunity</i>	<i>Vision</i>
Negative	<i>Crisis</i>	<i>Risk</i>

A positive present: i.e. an *opportunity*. This:

- has a relatively short time horizon
- is about a *positive* outcome

A negative present: i.e. a *crisis*. This:

- also has a relatively short time horizon
- is about a *negative* outcome

A positive future: i.e. a *vision*. This:

- encourages the donor to think far ahead
- is about a *positive* outcome

A negative future: i.e. a *risk*. This:

- also encourages the donor to think far ahead
- is about a *negative* outcome

Each of these case options is illustrated below, for two different organisations – one an HIV/AIDS development agency in Zimbabwe, and the other a theatre in a small UK town.

HIV/AIDS example

- **Opportunity:** ‘If we can buy the discounted anti-retrovirals from the pharmacy company and distribute them widely in the next 6 months we can reduce infection by 60% throughout Zimbabwe over the next 18 months. Your donation can help make that possible.’
- **Vision:** ‘By building the network of local health clinics and training local nurses in sexual health maintenance, we can ensure that within 5 years every person in Zimbabwe will have access to anti-retrovirals. Your donation can help achieve that vision’
- **Crisis:** ‘At current rates of infection, and with the current limited access to anti-retrovirals, 10,000 people in Zimbabwe will die needlessly in the next 6 months. We need to take urgent action to stop this needless loss. Your donation will provide the medicines to end this terrible situation.’
- **Risk:** ‘Unless we use a wider range of approaches- from anti-retrovirals to sexual health education programmes- to stem the growth of HIV transmission, in 10 years there will be 5 million AIDS orphans in Zimbabwe. Your donation could help avoid that terrible prospect.’

Theatre example

Opportunity: ‘Thanks to a shop closure next door, the building lease has come free on a large space. It could go soon. But if you can help raise the deposit in the next 3 months, the council have promised us first chance to take on the lease. With that space we could double the number of young people who come to our workshops’

Vision: ‘If you can help us raise the cash we can extend into the premises next door which have become free. With that extra 10,000 sq ft, we’d gain experimental space to complement our community work. In 3 years we’ll be the leading arts company in the city – and able to ensure every young person locally has the chance to see live theatre’

Crisis: ‘You’ve probably seen the damage cause by the recent storms. If we don’t find funds for the roof repairs within the next month, we will have to close the building. The loss of cash from the box office will be so great we may never re-open. And our town will have lost its only purpose-built theatre offering access for young people.’

Risk: ‘If we don’t secure the funds for the school’s access to theatre programme then within 5 years there will be a whole generation denied access to live performance – up to 3,000 18 year olds in this town who will have never seen a live theatre performance. We need your help to stop that happening. Young people need theatre.’

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You need to decide which of the quadrants your case falls into most naturally. And then you need to adapt it to fit the psychological reference of the prospect.

Take a second to reflect on which of these you believe generally works best when fundraising across a wide group of people.

We've asked that question in over 50 conference sessions in places as far apart as Brazil and India, Australia and Sweden. Almost universally experienced fundraisers know the answer. Most of them *wish* the most powerful approach was 'vision' (positive future.) In *practice* – from their experience – they know 'crisis' (negative present) is normally the strongest. The psychology of this is complex but can, in part, be traced back to Maslow whose hierarchy of needs is based around *unmet* needs. A crisis represents a powerful expression of unmet need. So while it's worth your while to always have an option to frame your case in each of the four options, make sure you can express it as a crisis by default.

5 Key questions to drive the structure of a case

Whatever quadrant your case statement sits in it needs to answer some key questions – questions that also help you make a useful structure.

1. **What is the need?** Your answers to this question should explain what *exactly* the need is and who *exactly* will benefit when that need is met. You should be able to scale the need so that donors or supporters can understand where they can make a *difference* even if they can't solve the whole challenge. ('World poverty' is too big for anyone to fix. Saving a child or a family, or a village, or even – if you're Bill Gates – a country, is more manageable.)
2. **What evidence is there that this is a pressing need?** It's not really worth pointing out a need unless you can demonstrate that it must be tackled *soon*. Otherwise you may lose ground to other causes. Your evidence could include surveys, expert opinion, or beneficiary statements. (World poverty's been around a long time – why the rush to fix it now?)
3. **How is your organisation uniquely qualified to tackle this need?** It's likely there are a number of agencies qualified to tackle this issue. What's special about you – your track record, the novelty of your approach, how effective you are? How will you build confidence and credibility? (What bits of world poverty can you alone tackle?)

4. **What will be the benefits of your action?** What positive consequences will there be if you are supported to take action on this need? What will be major benefits and what will be minor pay offs? What can you *guarantee* and what is *possible* but not definite? (In what way will we notice world poverty reducing?)
5. **What are the negative consequences if you fail?** Sometimes the key drivers for the donor are negative. This fits with our crisis-as-priority perception. How can supporters stop something awful happening or continuing? What are the major and minor negative consequences? (What is the bad news for those impacted by poverty if we don't address it?)

When you're developing your case use these questions to guide your collection of data and organising ideas. We think you'll find them helpful.

What's next?

To talk to us about how we can help your organisation write a powerful Case for Support, [email Bernard Ross](#), Director or call +44(0)20 7978 1516.

If you're in the arts and cultural sector and want to transform your fundraising efforts, visit the [National Arts Fundraising School website](#).

For further reading, you may also find these downloads useful:

- [Successful major fundraising: the 7 steps of solicitation](#)
- [The Influential Fundraiser](#)
- [How much do you need to change to be ready for a capital appeal?](#)
- [First make rice to succeed in fundraising](#)