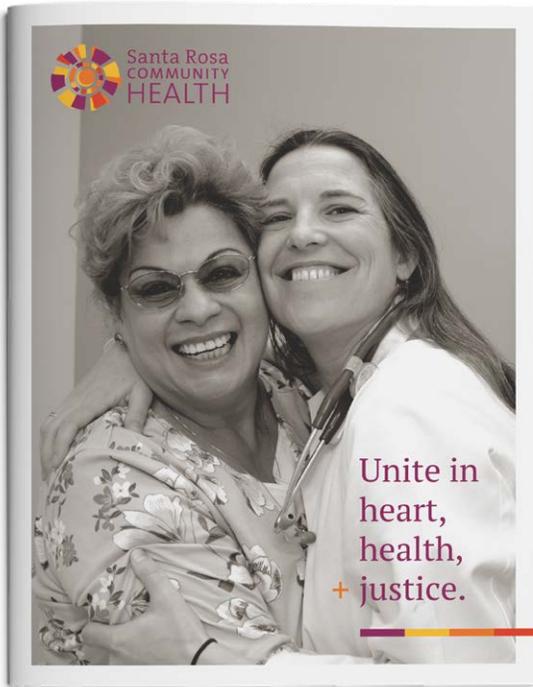


MARKETING GUIDE

# Make Your Case for Donations

## Create a Standout Case for Support

# INTRODUCTION



**Unite in heart, health, + justice.**

**The need is real.**

To help meet the need for health care in our community, we have more than doubled the number of patients; we serve from 21,000 patients in 2008 to more than 50,000 today.

There are still 25,000 Santa Rosans without access to quality health care.

At Santa Rosa Community Health, we look for more than a diagnosis. We seek to understand our patients and the circumstances that are influencing their health. Each patient is at the center of a team of caregivers that works to address the full breadth of their health care issues and needs.

We need your help. The new Dutton Health Center will allow us to extend our services to as many as 8,000 new patients.

We believe none of us should ever receive anything less than the best health care possible. Do you?

**Unite in health. Make a gift.**

**The New Dutton Health Center**  
Featuring a full range of services tailored to serving our community, including:

Integrated mental and behavioral health services

Integrated dental services

On-site lab and pharmacy services

Care coordination and case management

Comprehensive primary care for seniors, adults, women, and children

Support services, including help with transportation, eligibility assistance, and referrals

Santa Rosa Community Health Case for Support. Created by Mission Minded.

You've made it. You've finally landed that coveted meeting with your next major donor—the one who can finance an important new initiative for your organization. You've researched your donor. You know their likes and dislikes.

Now comes the big question:  
**How do you make your case?**

We're about to show you. And at the end of this guide, we'll summarize our tips for making it great.

## A Case for Support: What Is It?

Professional and volunteer fundraisers have an arsenal of tools at their disposal. Among them is the case for support: a clear document that lays out both rational and emotional arguments for why someone should support a cause or organization. Your case for support (also called a *case statement*) is a document that presents compelling rationale, in a compelling way, to support your organization. It persuades your donor to make a significant financial contribution because they identify with your mission and are riveted by your story.



San Francisco Day School Case for Support. Created by Mission Minded.



The Los Angeles LGBT Center Case for Support. Created by Mission Minded.

### The basics

A case for support can take many forms. It may be a simple, 3–5 page appeal printed on your organization's letterhead, or it may be more sophisticated, using great storytelling, design, photography, color, and typography to strengthen emotional appeal and credibility. Some organizations employ video or web tools to make their fundraising case come alive. Regardless of format, all good cases have the same essential ingredients:

- A statement of the problem that balances urgency, rationale, and emotion
- An outline of program goals
- Ways in which to give
- Supporting information

### The power of design

At Mission Minded we know that powerful design strengthens the appeal of a case for support.

Consider this line of text alone: "Dream with us." (With whom?) It's a nice invitation, but on its own it doesn't tap into the heart and soul of the donors it was written to engage.

Now look at the same line in context, on the cover of the case for support Mission Minded designed for The Los Angeles LGBT Center. The appeal jumps from the page. Combined with imagery throughout that uses color, photos, and graphics in a fresh way the message becomes urgent and relevant to the reader. And the line "Dream with us" takes the emphasis off the organization and onto the people it serves.

# Anatomy of a Case

## Introduce yourself

Your case's introduction serves three essential purposes:

- to establish your organization's purpose,
- to engage supporters in the challenges your organization faces, and
- to demonstrate the rewards of becoming part of your organization's success in answering those challenges.

Doing this well requires the right balance of urgency, rationale, and emotion. It can't be all about you, and it can't be boring.

## Tell a story

The most powerful introduction takes the form of a personal story: the story of a service recipient, visitor, or patron whose experience is particularly representative of your organization's promise.

The introduction's job is to help the reader identify with this individual. To that end, the *least* effective form is the dispassionate third-person:

*"The Help Agency provides support for young adults who are living on the streets."*

Well, so do many others. Now look at the power of direct address:

*"Have you met Sarah? You may have seen her on the streets—her bruises hidden behind her matted hair, her sign asking for help. Today, Sarah helps herself and many others, and she needs your support to make the dreams of others a reality."*

The word "you" directly addresses the reader and pulls them in.

**A genuine human story makes your whole organization come alive: the types of problems your constituents face, your organization's role in shaping their lives, and a demonstration of whom they've become thanks to being involved.**

## Rally your history

A brief discussion of your organization's history sets the context. In particular, note the ways in which your innovative solutions have not only helped the lives of individuals, but helped introduce a whole new type of service.

This should not be a litany of organizational milestones—this isn't a retrospective. Make it a vibrant account of the impact you've made over the years. Your successes give donors confidence in your ability to use their money wisely.

## Skip the mission statement (really)

If you've spent time, effort, and diplomatic capital putting together an effective mission statement, it's important to you—and of course your instinct is to use it in your case for support...but resist. **It doesn't have fundraising impact.** Leave out your mission statement. Instead, *demonstrate* your mission through the stories you tell. And if you have a Belief Message, this is the best time to use it.

## State the problem

This may be the most important task for a case for support. This section must contain strong descriptions of the problems in the world your organization exists to solve. Don't just talk about the problems your organization faces; highlight the issues that caused your organization to be created in the first place. Talk about rates of teen

homelessness, abandonment, and abuse nationwide and in your city. Show how access to the arts enriches the community and stretches the collective imagination. Detail a problem that needs answers and needs them now: Urgent Action Required.



## Avoid jargon

The language you and your colleagues use every day may not be familiar to your donors; write your case in everyday English. Avoid insider language, acronyms, and unnecessary abbreviations.

## Bring your statistics to life

If you need to share statistics to really lay out the problem, use them sparingly and make them come alive. Consider this example: “There are 1,600 homeless youth in San Francisco at any given time.” Now read it this way: “Every day a population of teenagers equal to the enrollment of two high schools walks the street homeless in San Francisco.” When information becomes visual, it becomes compelling.

## Outline your program goals

Take the reader from being engaged with the problem to appreciating how your organization offers real solutions. In this section, you show how you operate in order to solve the problem—the tangible benefits and impacts of what you do. You show how your organization’s solutions are unique and effective, and you seed the idea that with more resources you can bring forth more solutions.

## Present your fundraising needs

Earlier, when stating the problem, you focused on challenges facing the world. This section shows the holes that need to be filled. Here you should be outlining specific programs that need support, and showing where donor dollars are needed and where they’ll be spent. You’re setting the stage for the whole purpose of this document: asking for a donation.

## Make the ask

It’s time. You’ve given your reader personal stories, summarized a problem that needs solving, and presented your organization as the one that can solve it. You’ve shown your organization for what it is and what it can be. It’s time to ask for funds.

Asking for money can be tricky, but the most important thing is to be direct. Be clear that you’re asking for financial support, and be specific about the level of support you have in mind. Link gift levels with specific outcomes, such as: “With your \$1,000 donation, your organization will reach out to 50 new kids and give them the guiding hand they need. With your \$25,000 donation, your organization will add job counseling to the list of important services we already provide.”

## Show them HOW

Make it clear how readers can donate, and make it easy: Provide your contact information, website, and social media addresses at the end of your case.

## Special inserts

Some things are most effectively (and more cost-effectively) inserted separately from your case for support. These include up-to-the-minute, personalized, or changeable elements—recent news coverage of your organization; material uniquely suited to the

donor’s giving preferences; your board of directors or volunteer list, etc.

If there are additional benefits to supporting your organization, such as special recognition in your annual report, access to members-only programs, or a thank-you premium for your donor’s gift, consider including that information as a separate insert as well.

In other words, consider writing your case for support to be long-lived (holding true for five years, for example) and add the other elements as inserts, as and when you need them. You’ll save costs by printing your case in bulk, without sacrificing individuality or perishable information.

**We recommend designing your brochure in such a way that your request for donations can be customized for particular donors.**



# 6 Ways to Make it Great

## 1 Create urgency

Donors want to know that their money is needed to solve real problems, right now, and that their donation will have a real impact.

## 2 Write a narrative

Appeal to your readers' emotions with a story, then back up your request with the rationale. Tell them why a donation makes sense.

## 3 Be specific

Identify why the money is needed and how the world will be a better place because of the donor's gift.

## 4 Picture a person

Write the case as if you were writing to one person, someone you know, not to a generic public. Think about how you would speak to that one individual to really convince them to make the gift. Think of it as a one-on-one interaction.

## 5 Make it pop

Design your brochure to pass the "I'm too busy to read" test even if the reader never dips into the main text. Use powerful photos and call-outs to tell the story.

## 6 Ask for money

We've seen clients get shy about asking for money, but this is the *point* of your case for support. The case should say in no uncertain terms that you are asking the reader to make a donation now. (You may customize your "ask" with a letter or an in-person appeal, but the body of the case must still ask people to give.)



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Oakland Museum of California Case for Support. Created by Mission Minded.

# Testing the Case

Testing your case for support can be as simple as meeting with several of your top donors to seek feedback. Have them read the case and then ask them specific questions:

- Does this case make you want to support our work or program?
- Where is the case strongest? Where is it weakest?
- What specific changes would you recommend?
- How did the case make you feel?
- What emotions did you experience?
- Did you feel as if the case spoke to you personally?
- Do you think people will want to give after reading it?
- What is your understanding of the urgency in this appeal?

# How to Use Your Case

A printed or electronic case for support can be used in a number of ways, which makes it a smart investment:

- As part of your request to meet with a donor
- As a discussion guide during conversation with a donor
- As a leave-behind after a donor meeting
- As a stand-alone piece at a major donor event

Your case for support tells a story that bowls readers over and makes them want to give. It helps lay the groundwork for your appeal, strengthens your pitch, and keeps you in your donor's mind long after the meeting is over.

**Beyond the ideas offered here, we know that a nonprofit that understands and leverages its brand is in the best position to achieve its goals. We hope you'll use this guide to create an effective case for support and attract the donations your organization deserves!**



## Learn More

Mission Minded is a branding firm that works exclusively with nonprofits, independent schools, and foundations. We believe you only reach your highest potential if people understand the importance of your work—not just what you do, but why it matters.

Every day we partner with clients like San Francisco Opera, Yale Center for Emotional Intelligence, and the Denver Art Museum to help them determine the brand—or reputation—for which they want to be known. Then we help them bring that brand to life through key messages, logo design, web design, and more.

As a result, our clients successfully raise more money and attract the support they need to achieve their goals. To find out how Mission Minded can help your organization, call us today at 415.990.9360.