Developing a Compelling Case for Support

Ayesha Fakie
By the end of this session I hope to convey..

• What a CfS is?
  – Elements
  – Behind the theory
  – Do’s and don’ts
  – Language and style

• have practiced developing a mini CfS

• be able to
  – take back initial learnings to discover more and practice more back home
  – Begin to tell apart the good from the bad
Defining a Case for Support

A written concise statement of why a donor should support your institution.
- Communications foundation
- Most important document your organisation will ever write!
- Resource document
Case for Support

- Closing
- Case statement
- Unique position
- Modular
- Theme
- Motivation
- Need description – make it real
- Packaging - visual
- The facts
- Money & resources
- Passion & emotion
- Credibility

Elements
Tell it! What's your story? Tailor it to your audience!
But if it’s so easy, why doesn’t the money come rolling in?

Failure to take into account the reasons why donors give you money!
And then develop an internal document describing what the organisation does and why.

BASIS OF STRATEGIC PLAN!= A CASE FOR SUPPORT

*Does not interest donors.*
But if it's so easy, why doesn't the money come rolling in?

“Too often case expressions are written from the perspective of the organisation, containing jargon and reasons that make perfect sense to those working inside the organisation but that have little relevance for donors or others viewing the organisation from the outsider's perspective.”

Adrien Sargent and Jen Shang, 2010

Being inside or outside depends on your perspective.
So what can we do differently within the CfS elements?

Look at the key elements, and what do they really offer a donor?

How about ‘need’?

"I never give because I think there is a need. There are lots of needs. I give because its a programme I'm interested in and I think I can make a real difference."

– Alex Spanos, US billionaire philanthropist

Learning point(s):

• Your need isn’t that important. Yes, really.
• It IS essential, however.
• BUT – there is so much need in the world it is not a point of real differentiation.
• Your offering, and relationships, your stewardship and your ability to meet a donor’s needs (with caveats!).
So what can we do differently within the CfS elements?

**How about ‘vision’?**

“You can't build a reputation on what you're going to do.”

– Henry Ford

Learning point(s):
- If vision is not handled well, it can get in the way in your CfS.
- LIVE your vision. ENACT your vision.

**How about ‘uniqueness’ or ‘unique selling point?”**

*Just because a charity can identify one aspect of its work that other similar organisations aren't promoting, it doesn't mean it's a good idea to adopt it as a key strategic platform.*

Learning point:
- Unique attribute not always = to what will sell your cause.
How about ‘passion, emotion, and language’?
What did it take to put a man on a moon?

“... We choose to go to the moon in this decade and do the other things, not because they are easy, but because they are hard...We set sail on this new sea because there is new knowledge to be gained, and new rights to be won, and they must be won and used for the progress of all people...”
So what can we do differently within the CfS elements?

So, should we ignore the facts?
No. But go beyond the numbers and strategic planning.
The typical case statement doesn’t cut it anymore.
Tell powerful stories that trigger strong emotional support.
Set their hearts on fire and back it up with facts.
How will your donors see the facts? Shape their interpretation.

“The case tells the story. It reaches beyond the organization to where present and future constituents live. The spark of creative energy is the core of the case. The mission is that philosophical statement of concern that justifies the organization’s existence and invites constituency interest, support, and dedication.”
Coming back to storytelling.
Fundraisers feel odd using effective advertising because it feels like someone else’s voice.
BECAUSE IT IS SOMEONE ELSE’S VOICE.
Leave behind your ego and embrace the donor’s mindset.
Be authentic. Donors can spot hyperbole & insincerity a mile away.
MAKING IT REAL MAKES IT COMPELLING.

“Humans are not ideally set up to understand logic; they are ideally set up to understand stories.”
Cognitive scientist Roger C. Schank
So what can we do differently within the CfS elements?

“The story is one of the basic tools of the human mind for the purpose of understanding. There have been great societies that did not use the wheel, but there have been no societies that did not tell stories.”

-Ursula K. Le Guin

“For over one hundred years, St.Mary’s hospital has been part of San Francisco in its move from pioneer, frontier medicine to modern technology with all its scientific knowledge and medical advances.”

“Always transforming - and often saving - lives is the business of St Mary’s Hospital. It has been for over 100 years. And the night that Sadie Smith arrived in the emergency room with her 3 year old son, Nicholas, was no different...”
So what can we do differently within the CfS elements?

Your needs are best articulated when they’re sandwiched by your cause.

“After an intense study by experts within and outside the hospital family, St. Mary’s Hospital has identified the two most pressing healthcare issues to be ER services and...”

“Sadie knows that things may have been tragically different if it wasn’t for the dedicated team of expert health professionals and the state-of-the-art equipment that helped save Nicholas. Dr. Bill Brown, X Hospital CEO, knows this too. That’s why he and his leadership team have developed the long range plan to expand and equip the ER to be able to serve our growing community and ensure the future health of our families and neighbours.”
So what can we do differently within the CfS elements?

Some writing and language tips:

*Place yourself in the background. Do not affect a breezy manner. Do not inject opinion. Use figures of speech sparingly. Avoid foreign languages. Prefer the standard to the offbeat.*

- Avoid corporate and academia-speak
- Stories are best when told by someone. Use first-person singular as much as possible.
- Include stakeholder voices.
- Make your opinion heard.
- Bending the writing rules can distinguish your writing.
Digital Lives Research Project
Case for Support to Arts and Humanities Research Council
Neil Beagrie, British Library, November 2006

Research Questions

(i) How are modern personal digital collections of scholarly interest being created, managed and disseminated? What are the significant differences with the past in terms of format, content, or volume and their implications for curators and users?

(ii) What are the needs and views of potential scholarly users of future personal digital collections such as biographers and historians? How can their requirements be factored into new approaches, tools and services?

(iii) How should curators approach selection, preservation and access for these personal digital collections? What aspects of existing practice can be applied? What needs to be changed? What will be the differences between distinct collection areas such as oral history, history of science, or literary manuscripts and correspondence?

(iv) What are the implications of digital obsolescence and ephemeral media for the transfer of personal digital collections from individuals to long-term repositories? Should approaches and timescales for collection development and relationships with potential donors change? Do we need to be more pro-active? Can we develop better guidance, toolkits and services for individuals to ensure preservation before transfer? Should we explore methods for continuous capture of collections over individual lifetimes? What are the views of potential donors on these issues?

(v) Are there existing or emerging tools and services in the public or commercial sector which could assist with management, preservation and access of personal digital collections? Can we identify promising new approaches and potentially transferable practice to the academic sector?

(vi) What are the impacts of legislation such as the Freedom of Information and Data Protection Acts, intellectual property rights, confidentiality and professional ethics and practice (e.g. for scientific and medical information) on personal digital collections and the implications for their dissemination, or acquisition by repositories? Can model deposit agreements for acquisition of personal digital collections be developed?

(vii) How should we address “hybrid” personal collections of digital and traditional media? How can new and established curatorial practice be integrated?
we’re in this together

case for support
Transforming Lives.
A Campaign in Support of the Centre for Addiction and Mental Health
Think youth homelessness isn’t a problem in York Region?

In the morning I’ll sometimes find a kid sleeping on the porch. We’ll offer him a meal, a shower, clean clothes, someone to talk to and the chance to find a job and a place to live. At 8:00 that night, I lock the door again and hope he has somewhere safe to go.

— Theron Cumberbatch,
Team Lead,
Pathways Home Base
Youth Drop-in Centre

You’re wrong.

Throughout York Region, on friends’ couches and in cars, in church basements and in the park down the street are teens with no place to call home. You might not see them because they look like every other kid; they might not live on the street and they might be without a place to call home for just a few nights, but they’re homeless all the same. They are children from every neighbourhood, class and culture. They may be depressed, in an abusive relationship, on drugs or failing out of school. They may be from middle-class homes, with supportive parents and every opportunity to succeed in life. Homelessness doesn’t discriminate. And it’s extraordinarily difficult to measure.

A recent snapshot estimates the number of homeless Canadians at about 150,000, including 65,000 young people, but the real number might be as much as twice that. In York Region, experts figure at least 150 to 300 youth between the ages of 13 and 24 are homeless right now living in shelters or couch surfing at some point during the year. Another 32,000 local children are living in low-income households, where they are just one catastrophic event — one job loss, one failed relationship, one landlord disagreement — away from being homeless.

The fact is youth homelessness is a real problem in York Region, and it’s about time we did something about it.

You just don’t see them.

It’s what many kids do when they have nowhere to call home. They camp out on a friend’s couch until they’re told to leave. So they find another friend with another couch. And another. And another. Couch surfing is a fact of life for as many as eight out of every 10 York Region homeless youth who don’t live on the street, and it’s a big part of why so many of us think homelessness isn’t a problem in our region.

Jessica

I really can’t remember the last time I felt safe and cared for in my own home. Before I moved here my life was one of chaos, coach surfing, sadness, fear, uncertainty and failure. I would never have been able to do any of this without the care and patience of all the wonderful staff at Pathways. Knowing about the care and support of the staff helped me get and keep a full-time job and it helped me feel like an accepted member of my community, and a respected member of my community.

It was helpful and important to feel supported in doing things to get better and healthier. I am a very different person than when I first moved here and am excited to see what the future has in store.
The Amazon Campaign

Campaigning for ZERO DEFORestation in the Brazilian Amazon by 2015

2010 – 2012

Greenpeace International
Otto Heldringstraat 5
1066 AZ Amsterdam
The Netherlands
Summary of key points

• The needs of the organisation are secondary to the prospect’s desires.
• Writing strategy is carefully constructed along the lines of human decision-making psychology and neurology.
• Rational arguments are secondary to the prospect’s primary emotional needs.
• Superb storytelling is the optimal way to penetrate the prospect’s heart and mind.
• The needs of the institution are secondary to the mission.
• The voices chosen to speak in the case must reflect the cause and its universe.
Exercise

Write an introduction to a Case for Support for your institution’s campaign/project/need. Pitch your case to the group. Our donor panel will vote on the winner.
questions
des questions
السؤالة
perguntas
maswali
quæstiones
Thank you!

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