Creating Your Case for Support

What are you selling?

How to tell your story and raise funds for your nonprofit

What is a Case For Support?

The case for support is a clear, concise, and compelling document that inspires giving at the highest levels. The case is at the core of all fundraising. It is an external facing document that communicates an organization's or institution's uniqueness, vision, and goals, how much it needs to raise, and what the anticipated impact will be. It is rich in validated data points. It speaks to a reader's heart and mind, balancing emotions and facts.

- When completed, a well-written, well-conceived, and data-informed case will become the foundation for crafting fundraising brochures, website content, proposals, emails, social media messages and campaigns, videos, conversations, and more.
- It is a graphically designed, content-rich marketing piece.
- The case needs to answer questions related to your organization's or institution's programming, business model, sustainability, and place within the nonprofit sector.
- It should be created for the purpose of engaging stakeholders at the highest levels: people who can provide resources and open doors to potential major donors and funders.

Mel Shaw, Co-Founder & Vice President
Pearl Shaw, President, MPA, CFRE

Saad&Shaw

The Case for Support: What Are You Selling?

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A Forward-Looking Document

- The "case for support" is at the heart of all fundraising. It must be clear, concise, and compelling. This document is designed to convince individuals, corporations, foundations, or funding agencies to support your fundraising initiative.
- Different from a "case study," a case for support is a forward-looking document that encourages engagement and giving.
- We work with you and your team to clearly define your fundraising goals and timeframes, and to clearly communicate your unique impact.
- We ask you questions that major donors and funders ask before they invest. This allows you to create a case for support that proactively answers the questions of those who can make a difference in the life of your organization.

Saad&Shaw

Robert Poole, Senior Philanthropic Advisor

More than Mission, Vision & Goals

Answering the Business Questions that Underscore a Case for Support

A case for support should proactively answer questions a major donor or funder might have about your organization's vision, priorities, and strategies. We will work with you, asking all participants to dig deep and answer business-related questions such as:

- How will the success of your fundraising distinguish and position (or re-position) your organization or institution?
- What will be the transformative impact?
- How will funding, in conjunction with other anticipated resources, provide what is needed to fulfill the organization's strategic objectives?

We help participants compile the information they need to make their case. We ask questions related to the assumptions that underlie the case. We know that major donors and investors will want all information to be honest, true, and complete.

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Three Months of Hands-On Learning

Sessions

1. One-hour meeting with Saad&Shaw and your organization's leadership
2. One-hour group introductory session
3. One-hour group learning session: *What is the case for support?*
4. One hour group learning session: *Designing your case for support*
5. Four one-hour working sessions with Saad&Shaw and select members from your organization to review content and design
6. One-hour closing session: *Putting the case to work*

Format

All virtual learning.

Your organization's team must be committed to actively creating the case for support in-between learning and working sessions with Saad&Shaw.

Minimum time requirements:

- **Team participation:** Nine hours of learning and coaching sessions with Saad&Shaw over three months
- **Additional individual participation:** Three-to-twelve hours per person to develop case content and design case for support.

Ready to learn more?
901-522-8727
melandpearl@saadandshaw.com

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An Investment of Time

The amount of time required by staff depends upon your team's level of readiness. That's because there is work for the team to do in-between sessions with Saad&Shaw. Our experience has shown that readiness includes:

1. Experience articulating your mission, vision, goals, and anticipated impact
2. Prior experience working with a time-phased strategic plan with priorities that have costs associated with each
3. Data related to impact and community engagement
4. Team members' ability and experience in managing multiple priorities
5. Financial calculations and understanding of what it costs to support current and anticipated work
6. Level of experience working with PowerPoint, Canva, or a similar product

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Included Tools and Resources

1. A copy of Mel and Pearl Shaw's popular book *Prerequisites for FUNdraising Success*

2. Design lab workbook containing templates, tools, and additional information

3. Certificate of completion

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A Team Project

Creating the case is process that helps build the fundraising capacity of your team. We recommend inviting staff and board to become part of the process. Ideal participants are:

- Chief executive officer
- Board chair
- Chief operating officer
- Finance director
- Development director
- Development and marketing staff members

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Benefits of Creating a Case for Support with Saad&Shaw

Creating and using a case for support can help your nonprofit increase its resources, relationships, experience, and capacity to sustain and grow.

Used by organizations with diverse levels of experience – this learning experience engages leaders from across the organization. Ideally, this includes your executive director, development and finance staff, board members, program leaders and trusted volunteers.

- Developed and facilitated by professionals with decades of experience
- You are guided and directed by professionals with real life experiences
- User-friendly and affordable
- Builds capacity and infrastructure
- Hands-on learning
- Hands on support from facilitators – before, during, and after each session
- Includes workbook, templates, and the book Prerequisites for Fundraising Success
- A shared learning experience
- Time sensitive, accelerated learning process

Saad&Shaw

We Ask Participants to "Dig Deep" and Clearly Communicate Answers to Investment-Level Questions

- How will the success of your fundraising distinguish and position or re-position your organization?
- How much is needed, and how will funds be used?
- What will be the transformative impact?
- How will funding, in conjunction with other anticipated resources, provide what is needed to fulfill the organization's strategic objectives?

Note: A case for support proactively answers the questions a major donor or funder might have about an organization's vision, priorities, and strategies.

Ready to make a unique investment in your fundraising capacity?

Contact us today to get started.

Saad&Shaw
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(510) 798-4888 (cell)

Celebrating 20 YEARS

Saad&Shaw assesses, designs, builds, and supports fund development programs. We create multi-year, customized fundraising plans to guide and coordinate your fundraising activities and strategies. We help you assess your fundraising, engage your board, tell your story, and sustain diverse teams.

Bob Poole, Pearl Shaw, Mel Shaw

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