Building a case for support

National Trust

What is a case for support?

Key question: out of all the stories in the world, what makes yours unique?

People need to understand why they might want to give to your cause, and a case for support is a key tool for explaining this in a compelling way.

A case for support is
- A document that **provides clear and inspiring details** about the difference a donation will make
- A way to set out: who you are, what you do, what you want to achieve, how much it will cost, and how their support will make an impact
- A document that should be **written to suit the donor audience** in terms of content and tone of voice
- A tool that **helps you to speak confidently** to donors

A case for support isn't
- A stand-alone document. It should be used alongside other communication with donors
- A financial statement, strategic plan, or organisational manifesto

It's about the difference you can make

Setting the scene

Summarise the impact you want to make and how you will achieve it.

Some questions to help you get started

- What is the activity or project and what makes it special/unique/important/innovative?
- What is the need you are responding to?
- What outcomes will you achieve (summary)?
- How much will it cost (total figure)?
- Are there any punchy statistics/ quotes you can use to help back up your plan?

Being clear when describing your project is key. Which one do you think works best?

A – Figment House is raising money to restore some pieces of their collection to ensure they are saved for future generations.

B – Figment House needs £500,000 to restore their world-famous collection of renaissance painting so that they can go back on to display for future generations to enjoy.

Option B specifically states the need so that the donor/funder knows immediately what they're being asked to support.

The impact

Talk more in detail about the outcomes and the impact this will make.

This is ultimately what the donor is most interested in.

Things to consider

- What need are you responding to?

- Who will benefit and how?

- What would happen without this activity or project?

- How do you know that the intended beneficiaries want/need the project to happen? (Have you completed any consultation? If so, use quotes to help create impact)

- List planned outputs (eg a new greenhouse) but greater focus should be drawn to the impact it will have (eg new volunteering opportunities, helping a particular group come together and boost their well-being)

- What is your project's legacy?

Why your organisation?

Donors need to get to know your organisation and the work you do.

This helps build trust between you and the reader and shows your organisation is capable to deliver what you're setting out to achieve in this Case For Support.

Some things to consider

- Include a short summary of your organisation's purpose and vision

- Explain why your organisation is best-placed to deliver your activity or project, rather than anyone else

- Demonstrate that you have a good track record of delivering this type of work or supporting this audience group

Create urgency

A sense of urgency can be an important motivating factor for people to donate now

Things to consider

- Why is this the right time to act?

- What would happen if you can't carry out the project?

    - E.g. "without your support, the roof is at risk of collapse, destroying a key part of our town's history and losing an important community space for people to connect'

- Highlight how the donor will be contributing to the solution to the problem

- If the project can only go ahead with external funding, make this clear. This can make the reader feel that they could be the change-makers.

The cost

Provide a clear breakdown of how much everything will cost.

Break down your costs into specific areas; show what funding is already in place (if any) and what is still required.

Things to consider

- Do you have packages of work that might be appealing to the donor?

- Has your budget been agreed by the right people?

- A reasonable contingency should be expected

- Double check that everything adds up and makes sense

- Don't forget about hidden costs (e.g. insurance, maintenance, general overheads etc)
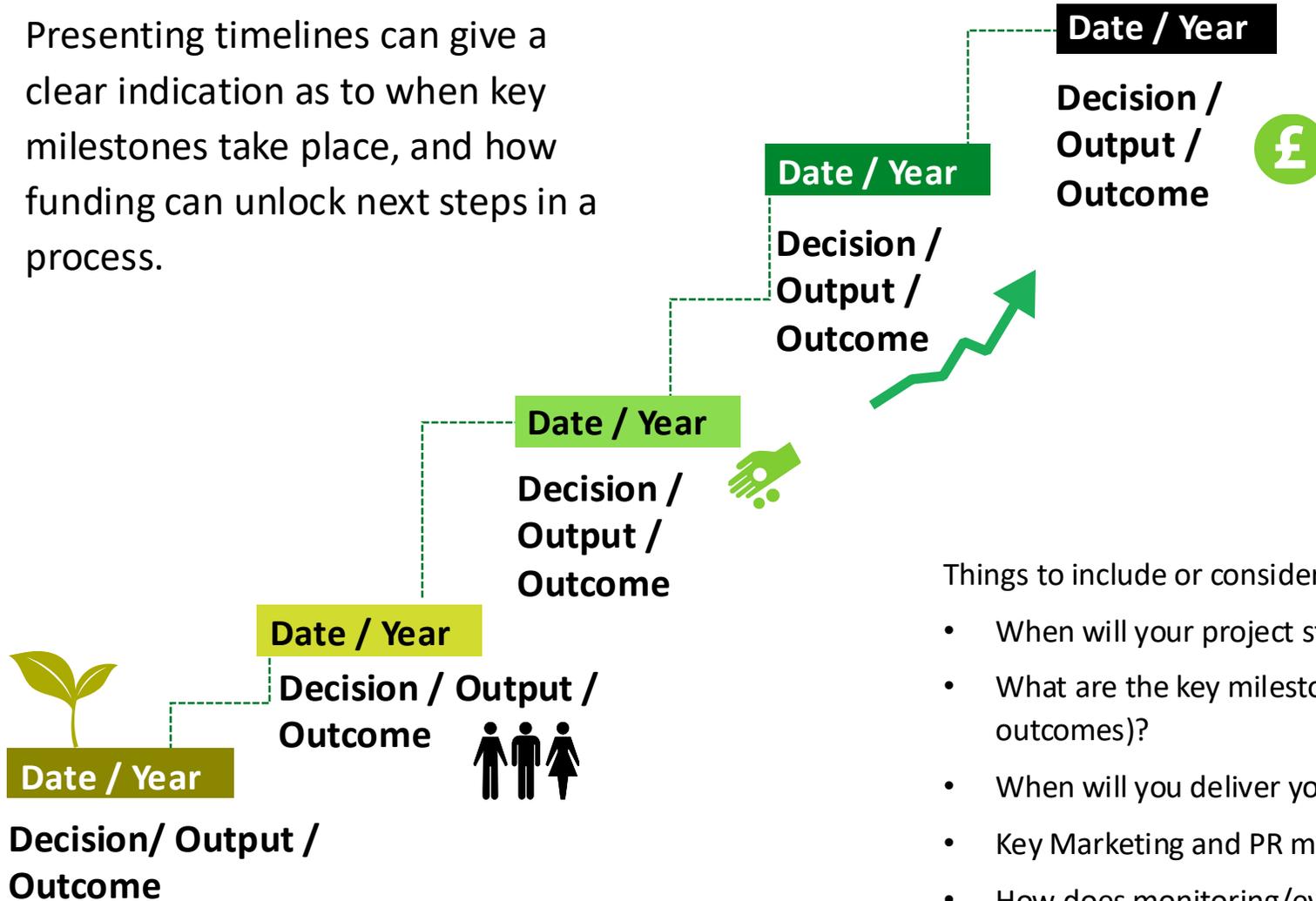
Example budget table:

Designated gift opportunities	Cost	Secured to date	Outstanding funding need
Woodland conservation	£500,000	£100,000	£400,000
Community hub / facilities	£300,000	£200,000	£100,000
Green house	£120,000	£30,000	£90,000
Volunteer training and apprenticeships	£50,000	£40,000	£10,000
Creating a community garden	£80,000	£0	£80,000
Total	£1,050,000	£970,000	£680,000

Example summary text … The project team is ready to make this change happen over the next xx years. We have already raised funding from xxx leaving xxx to raise to enable us to achieve xxx.
With the support of individuals and organisations who share this vision for xxx, we can give them the means to deliver this important work.

Timelines

Presenting timelines can give a clear indication as to when key milestones take place, and how funding can unlock next steps in a process.

Date / Year

Decision/ Output / Outcome

Date / Year

Decision / Output / Outcome

Date / Year

Decision / Output / Outcome

Date / Year

Decision / Output / Outcome

Date / Year

Decision / Output / Outcome

Things to include or consider

- When will your project start and end?

- What are the key milestones (funding as well as project outcomes)?

- When will you deliver your main activities?

- Key Marketing and PR moments?

- How does monitoring/evaluation play into this?

- Launch/celebration day/ special events?

Call to action (CTA)

Finish off the case for support with a punchy and emotive call to action which makes the reader want to support you.

Explain clearly what you'd like potential donors to do next, how they can support you and how to contact you for more information.

Things to include/ consider

- Can you make the CTA a solvable solution? (e.g. "Your support will **ensure we can fix** the windows in Figment House, so that we can welcome people here for generations to come".

- Make sure you have provided clear instructions on how your reader can find out more and how they can donate.

Planning and preparation

- Look at other cases for support. Pick out what elements you like so that you can recreate this in your own document.

- Have the generic information about your organisation to hand so that this saves time later.

- Gather quotes, testimonials and evidence before you start writing as this can help guide the tone of your writing as well as provide inspiration for when you come to write

- Know your donor audience before you start writing. Being persuasive requires you to know who you are talking to and what is likely to engage them.

- Write down the key messages you want to get across and refer back to them to keep your messaging on track

Bringing the story to life

Images are a fantastic way to create impact and help you resonate with the reader.

Images can help break up your text and help the donor visualise the outcomes and impact you are aiming for.

Things to consider
- Using people in images can be really powerful. Just make sure that that images of people are used compliantly.
- Images should relate to the text on the page, to amplify your message
- Think about how the image makes you feel to understand the visual impact for the donor

Language

Language is powerful and can inform, motivate and bring about emotion in your reader.

You need to ensure that language is clear and inclusive, as this makes your message more credible.

Top tips
- Use normal words, not jargon, and choose shorter words rather than complicated ones. Avoid technical language where possible.
- Try and make the first sentence in each section contain your most important message.
- Words like 'you' and 'we' feels warmer and more personal
- Inspire action – encourage the reader to do something (e.g. 'Discover', 'Move', 'Support', 'Explore', 'Give' etc)

Think about the flow of your copy and vary sentence length.

This sentence has five words. Here are five more words. Five-word sentences are fine. But several together become monotonous. Listen to what is happening. The writing is getting boring. The sound of it drones. It's like a stuck record. The ear demands some variety.

Now listen. I vary the length, and I create music. Music. The writing sings. It has a pleasant rhythm, a lilt, a harmony. I use short sentences. And I use sentences of medium length. And sometimes when I am certain the reader is rested, I will engage him with a sentence of considerable length, a sentence that burns with energy and builds with all the impetus of a crescendo, the roll of the drums, the crash of the cymbals – sounds that say listen to this, it is important.

So write with a combination of short, medium, and long sentences. Create a sound that pleases the reader's ear. Don't just write words. Write music.

Gary Provost, 20th-century American author

Emotion – Head, Heart and Hand

The essence of fundraising is appealing to emotions to help unlock a donor's desire to support your work. The head, heart, hand model can show you how to bring this to life.

The head – offers convincing reasons and facts. The heart – appeal to emotions. The hand – is the 'doing' or taking action part.

You can use all three interchangeably …

Hands -> Head	I am doing this, so there must be a good reason
Hands -> Heart	I am doing it, so I must feel good about it
Head -> Heart	This makes sense, so I feel good about it
Head -> Hands	It makes sense, so I'll give it a go
Heart -> Hands	I like the idea, so I'll give it a go
Heart -> Head	I like it, so it must make sense

- Punchy titles and straplines help to break up copy, and to guide the reader through the text

- If you use acronyms, spell them out first and then use the acronym

- Utilise bullet point lists to summarise key information

- Apply version control to your drafts from the start. There may be something you have written previously that you may want to reintroduce in later versions, so don't lose it!

Before sign off

Ask other people to read your case for support. Include people that know nothing about the project (friends/family etc).

- Is it clear to them what you want to raise funds for?
- Capture any emotions they felt and whether this was what you expected.
- What questions did they ask, and could this be answered in the text?
- What about the length – is it too short or long?
- Are the images the right ones/ did they resonate? If not, why not (it could just be the case that they aren't the audience that it's aimed at)

Run the document through a few spelling and grammar checks. Three checks across a few people, generally does the trick.

Read the CFS out loud to yourself to check the flow of the copy and smooth out any sticking points.