

Annual Philanthropic Case for Support Outline: Building a Case from an Investor's Point of View

Now more than ever, donors are looking for solid, outcomes-based information regarding the impact of their gifts. Our firm has found that donors considering major gifts are similar to investors considering significant investment opportunities: they want to know what the return on investment - or in the donors' cases, the community benefit - will be before determining their level of investment. Decisions are more objective, and less intuitive.

The strongest and most compelling cases for support provide vital information on the organization's (or program's) community benefits and relevance *from the donor's perspective*. Remember, information is power. From the donor's point of view: "The more information and detail you give me, the more I trust that you have carefully considered how you will use my gift."

Building an annual case is not the same as writing your annual appeal letter or brochure. This is an annual exercise to remind your organization (and, in turn, the community) why you exist, what is most relevant about your programs or services to the community and what your organization could achieve with increased funding. Every annual philanthropic case should include a "stretch" vision to encourage your donors to increase their investments and relationships with your organization.

As an annual exercise, review and answer the following questions, and incorporate the answers throughout your development and marketing program.

Annual Philanthropic Case for Support Outline

What is your relevance?

- Community context: what is the bigger picture outside of your organization? What is going on locally, regionally, nationally or internationally that sets the tone and context for your work? Why is the community's support important now - at this place in time?
- What societal/environmental/health/etc. issues are you directly addressing?
- How does your work directly affect the donor? What about the donor's life will be different because of the work you do or the programs and services that you provide?

How do you do what you do, and why are you the right organization to support?

- Why is yours the best organization to handle these issues? What differentiates your organization from other similar ones?
- What is your approach and why is it effective?
- What are your past and present accomplishments? What role(s) do you play in the community? (Use third-party validation - such as testimonials - as much as possible.)
- How does your organization's leadership in the community enable you to do this work?

How are you financially supported?

- Explain how you are funded (including the sources of revenues) and the impact of philanthropy on your ability to serve the community. Don't assume the donor understands your financial needs.
- How has your past success led to your current needs? How have your past accomplishments positioned you to take on new challenges, or needs or problems?

- What will increased financial support allow you to do? (This is important - you want donors to think about making "stretch" gifts.)

What are your top initiatives or goals for this year?

- What community needs are you facing *this* year? What are you going to do this year that's different, expanded, or new? How will these activities or efforts respond to the community needs?
- How did you determine these needs and the appropriate solutions?

Community Benefit: Definition of Success

- What is your vision? Remind donors of where you are heading.
- How will your organization or specific programs make a difference in the lives of donors (directly or indirectly)?
- Include a success story that makes your case personal, or focus on a cross-section of the community whose needs are new, and whom the annual appeal would help directly.

Call to Action: Why do you need the donor's support?

- Why should the donors support you? What will their gifts enable you to do that you can't presently accomplish? Sometimes organizations tell such a solid story, the donors walk away very, very glad that the nonprofits are so successful and don't need their support. Don't forget to wrap up your great case with a solid, bold and confident case for why you need increased support.

Wrap-up: Final Pizzazz: Why should your organization be at the top of your donor's list?

- Connect your vision with the donors. In making a significant gift, donors evaluate your project in three ways:
 1. *Intellect*: Is this a solid investment? Is this organization well-organized, and well-run, with solid programs and needs? Would I be proud to be associated with this organization?
 2. *Gut*: What about this organization or program just feels right to me - makes me feel that a gift to this organization should go to the top of my list of personal philanthropic priorities?
 3. *Heart*: What are the organization's stories or successes that touch me, excite me, motivate me and pull me in personally?