

# State Your Case!

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# What is a Case for Investment?

By definition and in its simplest form ...

*The **Case for Investment** is a philanthropic investment prospectus: a straightforward document that tells prospective donors what your organization hopes to accomplish with their philanthropic gifts.*

# What is a Case for Investment?

- Most important document your organization will write
- Rationale for supporting your organization based on:
  - i) Factual background and history
  - ii) Services and support you provide to community
- An opportunity to showcase your organization's achievements
- Expression of your organization's integrity and credibility

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# What is a Case for Investment?

## (con't)

- Cornerstone of all fundraising activity within your organization
  - i) Annual Giving Campaign
  - ii) Major Gifts Campaign
  - iii) Capital Campaign
  - iv) Endowment Campaign
- Resource document to draw upon to for the organization's communications, marketing and fundraising materials



# When do you need a Case for Investment?

- Every single non-profit organization needs a Case for Investment to be in place all of the time.
- Once the Case for Investment is created it should be a living document that is updated on an ongoing basis.

***Without a strong Case for Investment it will be very difficult to raise money.***

# Why do you need a Case for Investment?

- The Case for Investment can be considered the *Donor Business Plan*.
- It is the document that demonstrates to *investors* (donors) that your organization, its programs, services and areas of focus are a worthwhile *investment* (donor support).





**The Case for Investment must answer the questions a donor prospect may pose about your organization before they choose to provide support.**

- Who is the organization and what does it do?
- Why does the organization exist?
- What is distinctive about the organization?
- What impact are you making within your community, region, province, country





- What are your funding priorities at this time?
- How will the support provided be designated?
- Who will benefit from the support you receive and how will they be impacted by the support?
- How can the donor become involved?



A good Case for Investment will open the door to further questions with the most important one being ...

A close-up photograph of a hand holding a white rectangular card. The card has the text "How can I help?" written in a bold, blue, sans-serif font. The background is a blurred image of a person's face and a striped shirt, suggesting a professional or customer service context.

**How can  
I help?**

# Components of the Case for Investment

- Message from the Senior Volunteer & Senior Staff Person (i.e. Board Chair and Executive Director)
- Mission, Vision, Values
- History of Organization
- Significant milestones, awards, achievements
- Funding structure & demonstration of sustainability
- Statement of issue or need addressed by organization
- Goal(s) and Objectives
- Programs, services and areas of focus(including stats about # of clients, # of programs, # of locations, how need has grown and is projected to grow)



## Components of the Case for Investment (con't)

- Testimonials (Board, clients, community leaders)
- Staffing
- Governance
- List of community & government partnerships
- Fundraising needs/goal and a breakdown by program, services and areas of focus
- Charitable #
- Contact info (website, general email, phone, fax)

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## **The Case for Investment needs to be:**

- Written using simple, clear and concise language
- Both rational and emotional
- Compelling but not too emotional
- Developed by both staff and volunteers
- Donor-oriented



A Case for Investment tells your organization's story. A story that is written with heart, soul and passion – the same heart, soul and passion that brings you to work each day.



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# Steps to developing and writing an effective Case for Investment

1. Gather research and all relevant background information.
2. Define your main reason or objective for doing the Case.
3. Draft an outline or Table of Contents for the document.
4. Consider the core content for each section.
5. Brainstorm other elements that could be included to enhance the message.
6. Complete the first draft.
7. Complete the second draft.
8. Proofread again and once this is done the final draft should be complete.

# Case for Investment - Small Group Activity

- ❖ Divide into groups of 3-4 individuals
- ❖ Select one organization as represented by the individuals in your group
- ❖ Half the group will act as representatives of the organization and the other half will be donor prospects
- ❖ Identify your organization's need and associated funding requirements
- ❖ Craft 3-5 key messages about the need, outline how you plan to address the need and the support required to address the need
- ❖ Test your messaging with the donor prospects and tweak your messaging as required
- ❖ One organization representative should be prepared to share your messaging with the workshop participants



## The Case for Investment is more than a fundraising tool. It is ...

- ❖ a marketing and communications tool to draw from for the creation of speeches, reports, brochures
- ❖ a tool to guide the planning of programs and services
- ❖ a training tool as part of staff/volunteer orientation
- ❖ a tool to inspire staff, board and volunteers

# The Case Statement

By definition and in its simplest form ...

*The **Case Statement** is a concise document that clearly explains what need your organization seeks to meet, how you have and plan to meet that need, and what you could achieve with additional resources.*

- ❖ draws from the Case for Investment
- ❖ tailored for a particular audience
- ❖ usually, no longer than one page

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# In Summary

## **Case for Investment**

*The **Case for Investment** will provide an overview of the organization, inventory its achievements, promote the cause, justify the need for funds and raise your organization's overall profile.*

*If well written, the **Case for Investment** will also inspire, encourage and motivate people to support your organization through financial contributions or act on your behalf as volunteers and as advocates to increase awareness about your organization.*



# Questions