

WORKBOOK

Developing your case for support



Brooklyn, NY

Kansas City, MO

APERIOPHILANTHROPY.COM

In a year of crisis, we're relearning
the most enduring lesson of fundraising:
Relationships are more than important.

They are everything.

People *want* to give because they want to be part of the solution to the crises we are facing. They don't need events or technology or gimmicks to be convinced.

They need a relationship with you.

Relationship-based fundraising is the—*proven*—most efficient and effective form of fundraising because it aligns the power of your community with the power of your mission.

Using this workbook, you're taking the first step: telling your story in a way that sparks not only donations, but *loyalty*.

When your case is compelling in clear, donors genuinely want to *join you* in moving your mission forward.

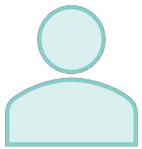
You can use this workbook on your own, with a fundraiser, or—if you'd like a little hands-on support—with an Aperio partner.

For additional case development support,
contact us at info@aperiophilanthropy.com



It's your time to thrive.

How to use this workbook



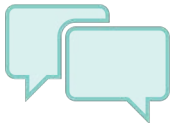
On your own.

Use this workbook to strengthen your personal storytelling so that you can approach your conversations and asks more confidently.



With your team.

Gather your fundraising, marketing & communications, and program teams to holistically 'refresh' your case and storytelling across channels.



With your Aperio partner.

Use this workbook to get your ideas on paper as you work through the case development process with your Aperio partner.

Case development process

1

Find your why

2

Describe your how

3

Package your what

4

Pull it all together with
a call to action

5

Correct common
mistakes

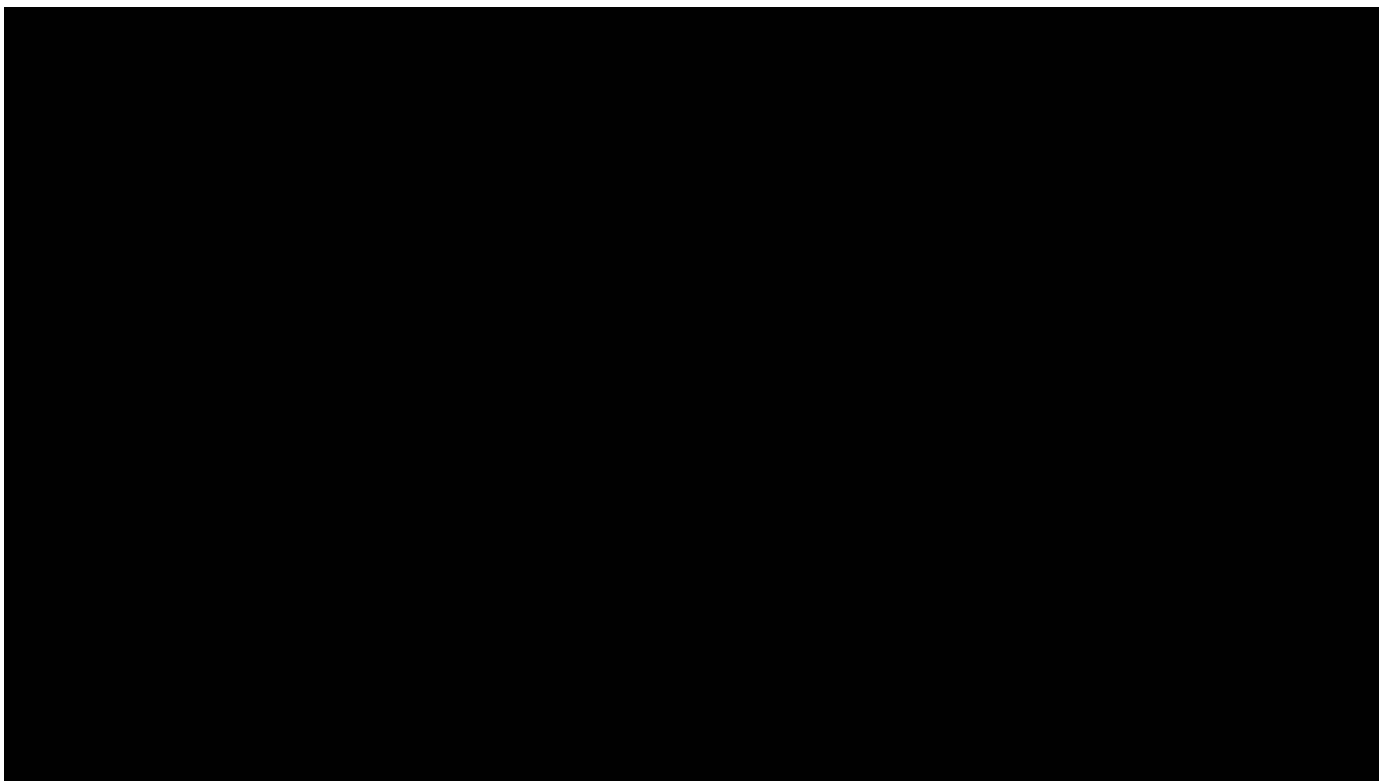
6

Repeat yourself
everywhere



Find your why

Watch



How great leaders inspire action · Simon Sinek

www.ted.com/talks/simon_sinek_how_great_leaders_inspire_action

Start with a blank slate

When we've been at an organization for a while, we get into routines. We get used to telling our stories in certain ways.

Every once in a while, it's helpful to clear the slate and start fresh. Maybe you're reaching a new milestone as an organization, or you've just completed a new strategic plan. Maybe a disruption in the world or your community has dramatically altered the context. Maybe you're just not seeing the results you'd like, and it's time for a new approach.

Give yourself the luxury of a fresh piece of paper.

Pretend you know none of the jargon, none of your program names, and none of your existing scripts.

Clear your mind.

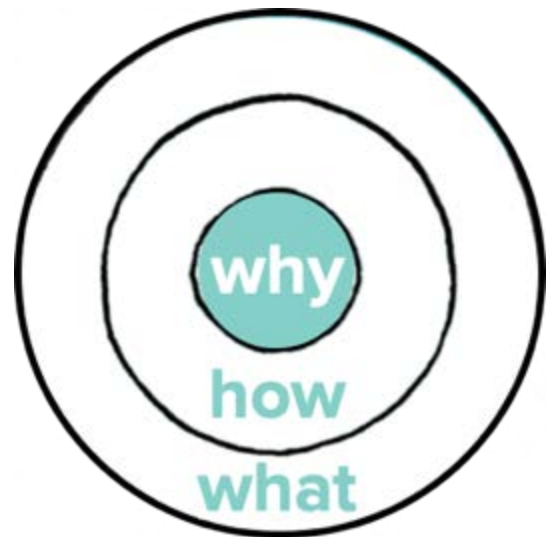
Now, let's go!

Explore your why

Simon Sinek's 'golden circle' is simple but powerful. As he says: "People don't buy *what* you do. They buy *why* you do it."

In fundraising, that translates to: People don't give to *what* you do. They give to *why* you do it.

To inspire action, we must first define our *why*. And that *why* needs to be something that moves us on a deep level—one that's hard to explain.



Why does your answer exist?

How does your answer make you feel?

Answer the question in another way: Why does your organization exist?

Look at your answer above: Why does that matter?

And again, look at your answer above: Why does that matter?

And again...

Keep going like this until you land on an answer that puts a real fire in your belly. You'll know that you've arrived when your answer *moves* you—and you can't really explain why that is.

That's your why.

Find your why

Now that you've dug a little deeper, how are you thinking about your *why*? Are you thinking about it differently?

Can you imagine how others might feel upon hearing those words at the same time? Would it move them?

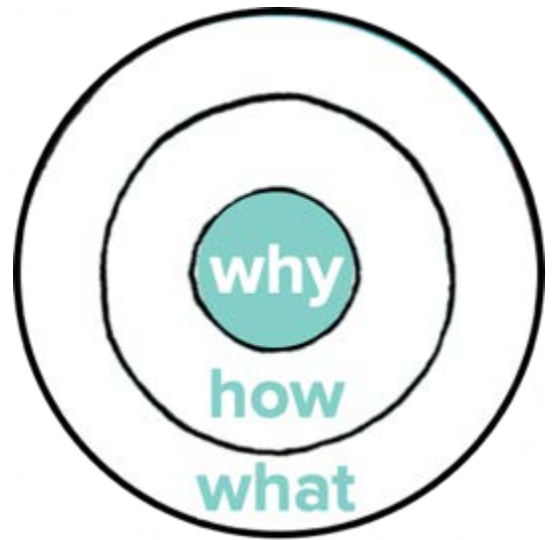
Can you feel it move you in new ways?

Write out your new answer: Why does your organization exist?

How does your answer make you feel?

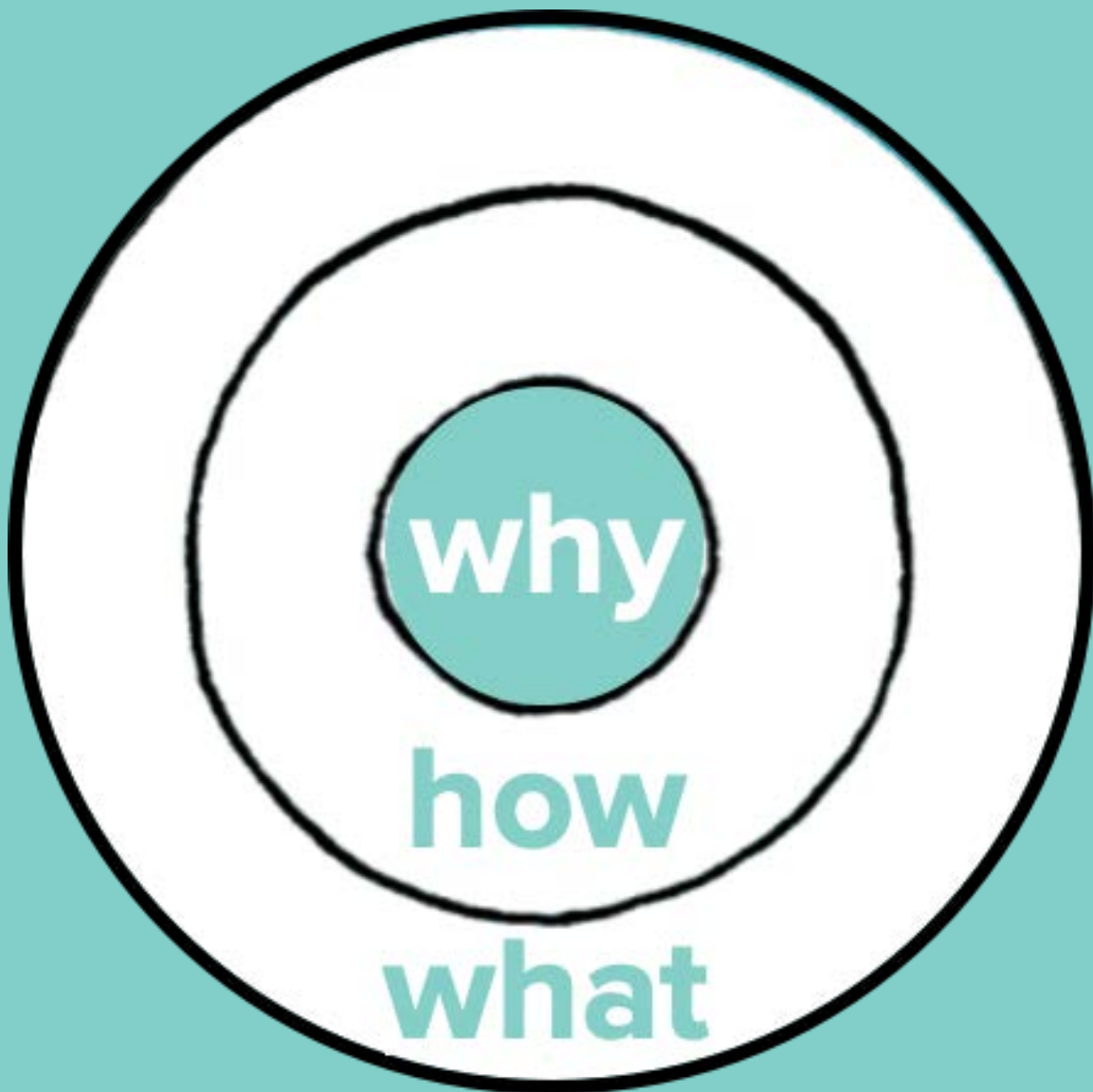
What is the most inspiring word in your answer?

Your why



Write your final 'why' statement in 3-5 words.

People don't give to
what you do. They give
to **why** you do it.



2

Describe your how

Describe your how

Most likely, there are other organizations with similar missions and programs to your organization's.

Your donors want to know: What sets you apart?
What makes your approach particularly impactful?

In this section, you'll be developing your 'value proposition' for a gift—why a gift to your organization goes especially far towards achieving your 'why.'

What is the 'secret sauce' behind your impact?

What is unique about your approach to your mission?

Fill this page with a list of short phrases (3-5 words) that describe what differentiates your approach. Use your answers on the previous page as a starting point.

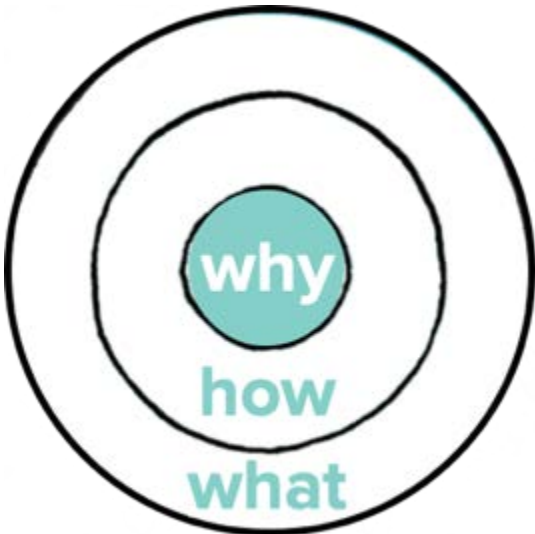
Looking back at your previous page, experiment with various ways to ‘bucket’ or group your differentiating factors in a list of 3 things.

Option 1

Option 2

Option 3

Your how



Pick your favorite list from the previous page.

① _____

② _____

③ _____

3

Package your what

Package your what

Most of us are great at talking about what we do—it’s the easiest part!

What isn’t easy is making that talk interesting. Too often we default to a long laundry list of programs. We talk in jargon or fancy branded

program names.

In this section, you’ll explore ways to ‘package’ your programs into categories with names your supporters can understand—intuitively, even before you offer additional information.

What are the main areas of your work?

What do you do?

Fill this page with a list of all your programs, service offerings, and solutions that describe what you do. Use your answers on the previous page as a starting point.

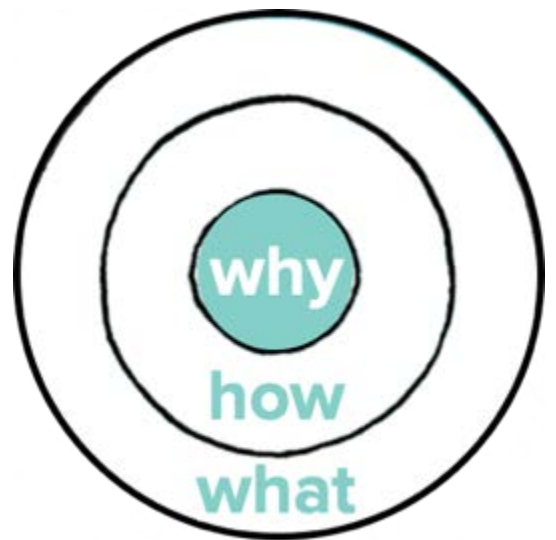
Looking back at your previous page, experiment with various ways to ‘bucket’ or group your list of programs, services, and solutions into a list of 3-5 things.

Option 1

Option 2

Option 3

Your what



Pick your favorite list from the previous page.

① _____

② _____

③ _____

④ _____

⑤ _____

4

Pull it together with a call to action

PART 1 · Assemble your ingredients

Create a call to action

We create a case for support to inspire action on the part of others—unusually a donation.

A strong ‘call to action’ builds on your ‘why’ and genuinely *inspires* someone to give. As we know... People don’t give to what you do. They give to why you do it.

While other motivators—such as guilt or obligation—can drive donations, genuine inspiration drives something better: ongoing and *loyal* giving.

Your *why* is the most powerful call to action you have.

What is the behavior you are trying to inspire?

Put yourself in your donor’s shoes: Why might you be inspired to do it?

Fill this page with different ways to word your call to action. Use your answers on the previous page as a starting point.

Tip: Focus on the verb, or action word—change lives, accelerate cures, transform our community, end hunger, lead the solution.

Cut out the word ‘help’. Your donors are not just helping. They are doing the work by fueling it with their dollars.

Looking back at your previous page, pick your three favorite call to action options. A call to action should be no more than 3-7 words.

Option 1

Option 2

Option 3

Your call to action

Write your most powerful call to action here.

Distill your proof points

Here's the time for facts and figures to work their way into your case.

Rather than list them all out for donors, we will select three that hold the most power—and represent the rest.

Donors do not give because of proof points, but they do use proof points to justify their decisions.

For that reason, proof points need to be clear and simple—so that any donor can remember and repeat them, even after hearing them once.

What are some of the supporting facts you use to back up an ask?

Fill this page with different proof points or different ways to articulate those proof points. Use your answers on the previous page as a starting point.

Looking back at your previous page, experiment with various ways to ‘bucket’ your proof points into 3 simple statements.

Option 1

Option 2

Option 3

Your proof points

Pick your favorite list from the previous page.

① _____

② _____

③ _____

Your case for support plan

Compile your answers from pages 10, 16, 21, 26, and 31 here.

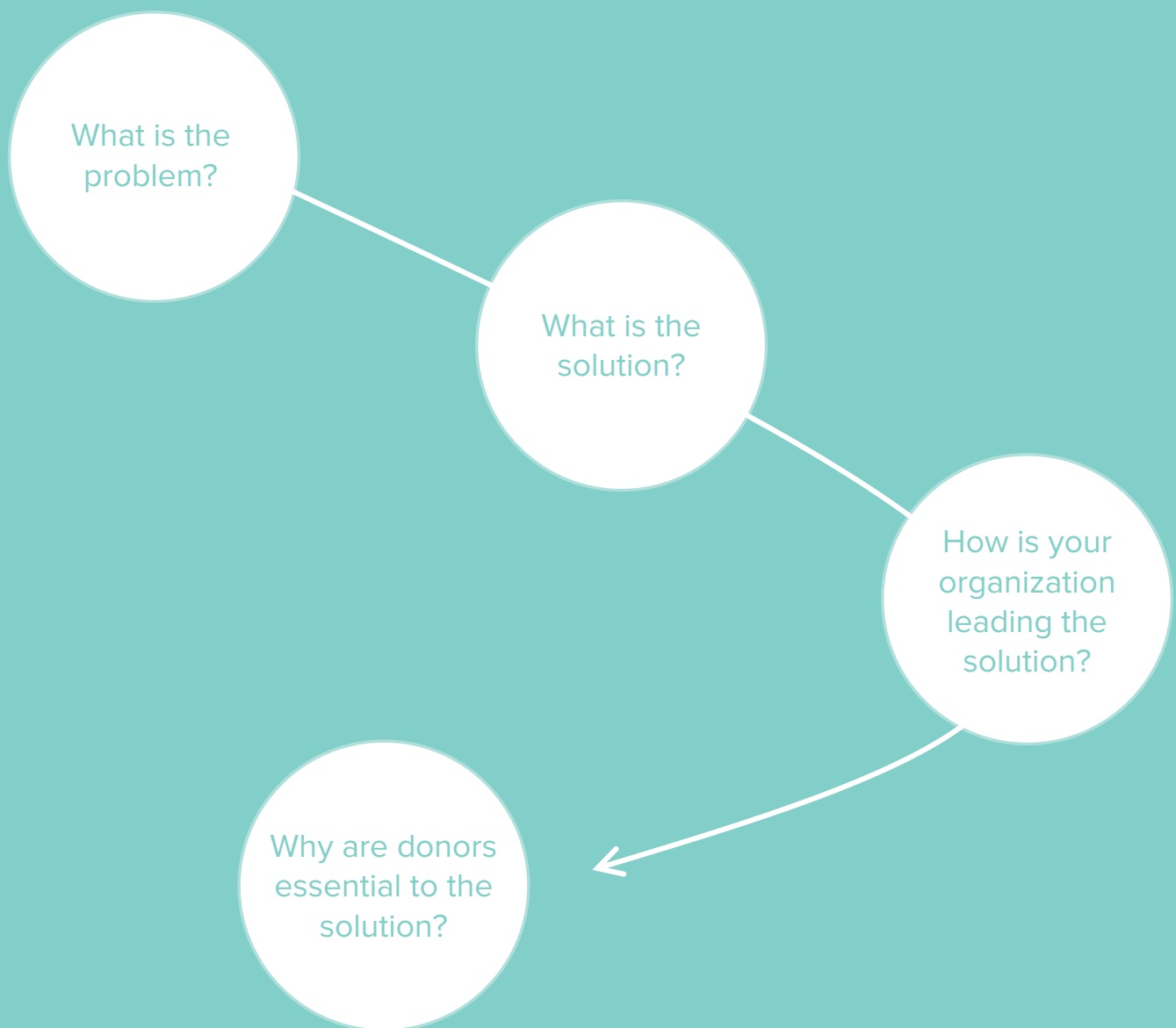
Why					
How					
What					
Call to Action					
Proof Points					

4

Pull it together with a call to action

PART 2 · Develop your case story

A **case story** brings to life a **donor's** opportunity to be part of the **solution**.



Develop your case story

Now that you have assembled all the key 'ingredients' for making the case, it's time to turn your case into a story.

The word 'story' means many things in fundraising, but here we mean talking about your organization in a way that is interesting to donors.

Later, you'll incorporate stories in a more specific sense—individual clients, examples of breakthroughs, etc.

For the moment, we are still talking big picture.

How do you tell your case story today?

A day in the life

What is it like to be the people, animals, communities, ecosystem, etc. that you serve?

When you have fully fulfilled your mission, what will it be like?

Elements of your story

Problem

Look back at your 'why'. What is standing in the way of your 'why'?

Solution

In very general terms—beyond your organization—what is the solution?

Tip: As you answer these questions, look back at what you wrote on the previous page. Put yourself in the shoes of the people or cause you serve. Don't answer academically. Speak to the real problems and solutions.

Your organization's role

Look back at your 'how' and 'what'. What is your organization's unique contribution to the solution? How are you leading the way?

The donor's role

Look back at your 'why' and your 'call to action'. Why is the donor's support essential? How is it an opportunity for the donor to be a major part of the solution?

Your case story

Compile your answers from pages 36 and 37 here, distilling your answers to 1-2 sentences each.

What is the problem?	
What is the solution?	
How is your organization leading the solution?	
Why are donors essential to the solution?	

Developing your 'boilerplate'

You've organized your case plan. You've mapped out your case story.

We're ready to develop your 'boilerplate'—a concise and compelling version of your case that you will use as the jumping off point for every other case statement, one-pager, appeal, email, or digital asset you create.

This is your core story that you will repeat and replicate everywhere.

Ideally, it should fit on one page. 1-3 paragraphs should be all you need now that you have your thoughts organized.

Put your Case for Support Plan (page 32) and Case Story (page 38) side-by-side. Referring to them, write out your full case for support in 1-3 paragraphs.

Use your Case Story to guide the flow—problem, solution, your role, and the donor’s role. Use your Case for Support Plan for the exact language to use in describing why you exist, how you work, what you do, your call to action for the donor, and (where needed), your proof points.

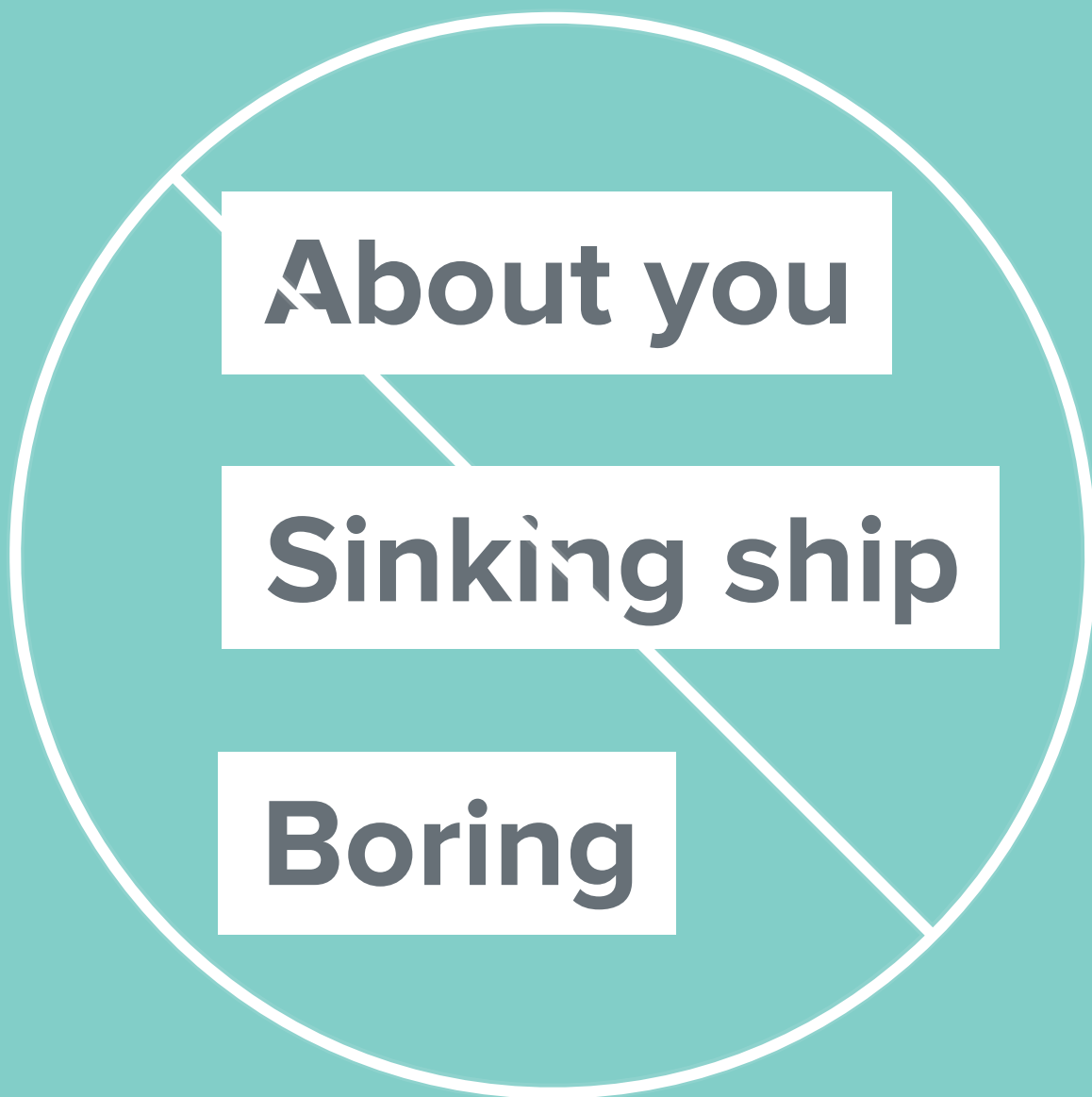
Without referring to the previous page, write your boilerplate again.



5

Correct common mistakes

The purpose of the case
is to **inspire** action.
Your **why** is what inspires.



Correct for common mistakes

Congratulations.

You have accomplished the most difficult step: Going from a blank piece of paper to boilerplate language.

Before you put your boilerplate to work, take a moment to double-check for common mistakes.

As you go through the following pages, remember, these are not hard-and-fast rules. They are guidelines based on our reading and writing of hundreds of case statements—and our using them in practice with donors.

Your organization and your audience is unique, so feel free to carve your own path. Your voice creates the case. Your why creates the case.

Important: Develop your ‘boilerplate’ case using a *relationship-based fundraising* lens—not a direct mail, marketing, or social media lens.

As you write and review, imagine you are in conversation with your major gifts, foundation grants, and corporate partnerships.

Why?

Because after you create your boilerplate, you will version it for different audiences—and it is much easier to tailor a relationship-based fundraising case for support to direct mail, say, than the other way around.

Using this approach will leave you with the most *inspiring* version of your case for support.

Mistake: About you

About you

Story told from the point of view of the **organization**

“We’re \$XX away from **our goal** for the year...”

“Your support will help **us** to...”

About who you serve

Story told from the point of view of the **community**

“You can make a particular **impact** at this time because...”

“**You** will...”

You are
not the
story.

You are
the vehicle
for the story:

**neighbors
helping
neighbors.**

Mistake: Sinking ship

Sinking ship

Crisis-focused and alarmist in messaging, tone, and look & feel

“If we **don't raise** enough, we **won't be able** to...”

“We're counting on you...”

Visionary with a plan

Forward-looking and inspiring in messaging, tone, and look & feel

“If we **raise** enough, we **will be able** to...”

“Together, we can move forward our shared goal...”

Few donors
give to save
organizations.

Many
give to

**invest in
something
that lasts.**

Mistake: Boring

Boring

Facts, facts, facts

Jargon, acronyms, fancy names

Lots of adjectives and adverbs

Compelling

Stories, stories, stories

Clear, intuitive language

Great verbs

Don't force the
donor to learn
everything about
your organization.

Make it
simple
**to be
inspired.**

Your 'boilerplate'

Write your boilerplate (starting with page 41) again, making corrections to make it even more inspiring.



Repeat yourself everywhere

Using your 'boilerplate'

Now that you have a boilerplate—hooray!—creating collateral, communications, and marketing will be much simpler.

Some of the pieces you develop will be longer than your boilerplate and will require more details. Others will be shorter, and feature only pieces of your case.

Some will be more rational and logical—such as foundation proposals. Others will be more emotional and urgent—such as direct mail pieces.

As you make variations, remember: The more consistent the better.

Once your boilerplate is defined, consistency is king—not innovation.

Why?

We live in a noisy world. To remember what we heard, we have to hear the same message in the same way many times. To be moved to action, we have to hear it even more times.

Where to use your case

Relationship-based fundraising materials

- One-pager
- Case statement
- Written proposal template
- Corporate partnership deck
- Talking points for fundraisers
- Personalized appeals

Marketing & Communications

- Direct mail
- Website
- Social media
- Communications

