

The case for support: what it is and how to do one

One of the most important parts of planning a fundraising campaign is working on what's called 'the case for support'. This is **a case for giving**, the expression of 'the cause' and why it warrants support, it sets out why donors should give to a charity. It's a thorough and well-argued statement covering all the things a potential donor needs to know before they decide whether to give to your project.

Understanding your case for support and communicating it well is important even when the times are good and easy. **When times are financially tougher**, there's a lot you can do, (see 'top tips on fundraising in a recession' on www.fwbo-centre-support.org) but **the most effective thing you can do is strengthen your case for support**. Donors don't want to hear about falling income, or how your organisation is hurting. **Individual donors are usually motivated to support you because of an affinity with your project's vision, mission and values. That's what they want to hear about.**

It's easy for us in the fwbo to be in a bit of 'a bubble' sometimes and think this is obvious, that people already know, that we don't need to say what the Buddhist centre is, what it's doing, and what the benefits of that are. Sometimes people *don't* know all there is to know about your project, especially if they're relatively new to it. Moreover, potential donors are not just the 'hard core' or committed sangha, it's everybody who has had any kind of contact with the centre. Sometimes, we can take it for granted and forget just how life-saving, life-affirming, and life-changing *our* experience has been. It can be vital – not boring - to be reminded of this, and reminded too that the centre's purpose is not limited to all the people who are already there.

What's important in a case for support is that you don't just explain the features of the centre, ie a description of what it does, but the **benefits** of it. As a preliminary exercise to preparing a case for support, try to **write a benefit statement** - on your own or with others. Don't use Buddhist or FWBO jargon. Saying you teach meditation and the dharma won't satisfy me, as an adequate benefit statement. I'll say 'so what?' in response ie I want to know - in precise and simple language – what the benefits of that are?! Perhaps you could think back to the impact going to the centre, or your project, had on you when you first came in contact with it. And ask others for their 'story'.

Why do people support you in the first place? Actually, it could be extremely revealing and helpful to ask your donors why they are supporting you. Don't assume that you know what people think, how they feel, and why. This is also a good area to explore when asking other potential donors. Don't do all the talking!

What do your donors want from you? Again, this is a good question to ask. Research shows the following are fairly likely answers.

- They want to know you're doing the most effective job you possibly can with the money they give you.
- They want to know their gifts are affecting the issue you're addressing. (They're interested in impact, not your salary or the wotnot bill.)
- They want to know that you value their contributions.
- They want to know what's happening ie make sure you report back, communicate with them about the things they're supporting with their gifts.

So where do you start in preparing a case for support and what do you need to do? You need to collate a pool of resources that can be used to write it. Some of this may be existing documents. Some may need to be created for the first time as part of this process. You'll probably need to have discussions with your Trustees and your core fundraising team to either create or clarify and update some of this material. I'll go into details in a moment.

Exactly what you turn this pool of resources into may depend on what kind of fundraising campaign you're planning to do. You could end up producing a case for support that's five, ten or twenty pages long. You may, or may not, want to use that for external distribution. If you're about to launch a capital fundraising campaign, or make a grant application, for example, you may well need to produce something that substantial. If you want to run a campaign for standing orders, you may also want to produce a leaflet or small brochure. Or you may just end up using a few sentences, a couple of paragraphs, one side of a sheet of paper. (Don't assume that this is any easier to produce!) Even if you end up using a brief case for support, **the preparation and background information will serve you well.** People may ask (quite rightly) all sorts of questions before they decide to give to your project, and if you (all of you, in agreement) can't answer them, you'll lessen your chances of success. Who's running the show? What exactly are you trying to do? How? By when? Why? Etc etc! Finally, **how you present the case for support may vary** depending on *who* you are asking. For example, you may ask an Order member for a donation or standing order differently to how you ask someone who attends a beginners or yoga class. They'll be common ingredients to both, contained in this pool of resources you pull together, but how you then use it to fundraise may vary.

So let's now have a look at what some of these items may include.

1. Firstly, who are you and what are you trying to do – in general. This includes:

A statement of purpose that incorporates the vision, mission and values of your project or organisation, your ultimate goals. You may have a statement in your charity's constitution that will do the job here. It's worth mentioning here that a few centre's have recently updated their constitution and expanded their remit, so that as well as teaching the dharma and supporting the Order, they also 'engage in activities that alleviate suffering in the community'. There's several reasons for, and benefits of, this. It makes the altruistic dimension of the centre's activities more explicit. It makes successful applications for external funding much more likely eg to local authorities for carers events or funded places on MBCT, Breathworks and other such courses. It's bound to help all fundraising actually. So you may want to revisit and update your constitution. And/or you may find it helpful to develop a mission statement.

A capsule history of the organisation. Why and when it was created. A list of its past achievements. Plus more recent successes. This illustrates your credibility, reliability, integrity. It also shows how you make a difference.

A description of the governing structure. Who's running the show?! Who are your Trustees? What's their track record? Are they representative? How is their experience

relevant to the work of the project and the people the project is working to benefit? How are they appointed? (An opportunity to illustrate the FWBO's principle of autonomy for local centres?)

Financial statements. This can help illustrate how financial resources are used and the level of financial need. You must communicate integrity and offer to tell people more if they need to know more, if they want, for example, to see your council's minutes or audited accounts. Anyone can go onto the Charity Commission's website and see your accounts, but make it easier for them. Use meaningful graphics. *You*, of course, also need to be savvy about your financial situation to be credibly fundraising for it! If this is a tricky area for you, check out Lokabandhu's crash course on Financial Literacy under legal and admin on www.fwbo-centre-support.org

Statement of non-financial resources. A description of the facilities you offer and a list of resources that you use in providing your programme of activities.

Staffing plans. Outline how both paid staff **and volunteers** are used in how you deliver what you do. A further chance to extol the virtues of your team/community and inspire confidence and enthusiasm, which will encourage people to both give and get involved.

Planning documents. People give to success. They want to know you have both a vision and a future. If you have an organisational or strategic plan, share it. It may also help to describe the nature of the planning process itself – this would convey that there's a bunch of committed and keen people who, whilst open to more involvement from others, know what they want to do and how they want to do it.

An outline of the programmes and services that you provide. This is where you express how you implement your vision and your mission. Don't write a bland statement of operational strategy. Stress the real impact your project has on people's lives.

2. The specific objectives you are now trying to achieve with this fundraising appeal.

There may be some overlap here with the last point if you're, for example, doing a committed giving campaign (for standing orders) to increase a reliable and sustainable income for your centre or project. **What exactly are you going to do if you get the funds you need, are asking for?** Provide more classes? Hold on to key teachers? Do more outreach? Move to a bigger premises? Buy a retreat centre? You must show that you've thought this through: what you want to do, why it makes sense, how to deliver. Also show (linking to your track record and credibility) how and why your approach is distinctive.

Why is the appeal important? Who will be helped and how? What difference will it make? How will suffering be eased? What's the level of the need? How will the world, your local community, be made a better place. This part of your pitch needs to **appeal to the heart and uplift the spirit**, make people feel happy to be part of something positive and life-enhancing. Positive and happy images of the benefits of your work will often help you with this. Karuna are great doing this in their materials. Paint a picture, use case studies of real people or activities if possible.

What would happen if you didn't run this appeal or the appeal failed? Again, paint a picture. Help people understand that an opportunity may be lost, and to see the consequences of that. You're making a point, not guilt-tripping or blackmailing them.

How much money are you trying to raise? You must be specific about how much you need and what it's for. If you can, provide a budget that lists your costs. You mean business, you're trustworthy, you will spend the money on what you're fundraising for, and only on that. You're appealing to people's heads as well as their hearts.

Make a specific ask, or range of asks i.e. specify how much you want people to give. If possible, show how each donation will make a difference, how a potential gift will translate into a tangible benefit.

Over what period of time are you attempting to raise the money? Why is the appeal urgent? Why is it essential you do this work? And why now? Why can't it wait? People want to help but put off giving because they think they'll do it another time, so you need to motivate them to act **now!**

Who else is involved and contributing? This provides a context for the Ask. People like to contribute to a cause they know others also think is worthwhile. It also assures people you don't expect them to be the sole source of money for the project. So you could mention other income streams, as well as other donors (if you name individuals, make sure you get their permission first).

Be consistent. Don't go it alone and don't shoot from the hip – if you do that, you may blow not just this appeal but the prospects of future fundraising. You need to fully explore with the leadership of your project exactly what you're going to do, before you go public. Iron out any disagreements first so that all those speaking on behalf of the appeal are singing from the same song sheet.

Be concise, coherent, motivating. Be straightforward. **Be easy to understand** – use clear and simple language, avoid Buddhist and FWBO jargon.

Last, but by no means least, **relate to your donors.** Donors want to know how they can contribute to a charity's activities and what difference it's going to make, what difference *they* are going to make by giving to your project. The main challenge in crafting a case for giving is to **establish a link between the donor and the issues your project addresses, especially the people who benefit** from what your project does. That's the connection you need to emphasise, not the connection between the donor and your organisation itself *as an organisation*. Show how their gift will be a reflection of what they care about. By giving to you they're expressing something of who they are.

In a general sense, a case for support must address three needs:

1. Describe how you'll fulfil your mission and advance your vision if you get the funds.
2. Make clear how the gifts you receive will help you achieve the specific objectives of your campaign.
3. Emphasise in what ways, both tangible and intangible, the donor will benefit from contributing to your cause or campaign.

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