



## **AFP Information Exchange**

### ***Breathing New Life into the Study Case for Support***

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# Breathing New Life into the Study Case for Support

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The test Case. The study Case. The interview Case. Whatever your organization calls this draft—yet critical – document, it’s a far cry from the sleek, bold, attractive and brief document you’ll begin sharing with prospective donors once your capital campaign is in full swing. Rather than a smart, eye-catching tool designed to truly sell your campaign, this more modest cousin has long been used in advance of a campaign to test the waters, to plumb the likelihood your campaign would succeed. Unfortunately, this document is often relegated into the “just the facts, ma’am” style of writing with all the color and flair of a bulleted shopping list.

But it doesn’t have to be.

In fact, if you want to have an engaged pool of prospective donors clamoring to give even before your official launch, devoting ample time to creating a meaningful and useful case is absolutely essential.

## Test Case vs. Campaign Case

### Purpose

The primary difference in these two cases is the purpose. While a campaign case is a telling document, designed to offer details about the chosen projects, the test case is an asking document whose chief objective is to ask participants to evaluate a set of projects and determine which appeal most to them.

Much of the material and tone you use in your final campaign case is applicable in the test case, but the most successful test cases don’t merely test the waters. In fact, in our work, we have stopped using the term “feasibility” study (during which the case is tested). This infers that our sole job is to determine if the campaign could succeed.

If the only purpose for you to approach donors in this phase is to say “what are the chances...” the feasibility of a successful campaign is slim. Rather, we now test cases as part of a “Campaign Planning Study” process. We aren’t just gauging potential gifts – we are cultivating prospective donors, stewarding existing donors, turning up the volume for those who may have forgotten why they once supported you. We’re not guessing at the level of fundraising success - we’re preparing for it and laying the foundation for it.

The test case, then, is a major part of that process.

What the test case is not is an opportunity to blindside an interviewee with a laundry list five pages long and anxiously encourage them to “pick the best one!” Instead, you’re demonstrating that you were at once thoughtful in your selection, but still open to suggestions. You’ve focused on a theme that binds all the projects together, but you still want to confirm that these projects (and the vision they will support) are things that the donor community actually wants and in which it feels compelled to invest.

## **Look**

The other main differentiator is that since this document is for “internal”—family, friends, past donors—it should not be the slick sales brochure that comes later. Photos are a great way to add color and personality, but this document should not appear to have cost a lot of money to produce. This is true for two reasons:

1. Those who are close to your organization would wonder why you’re wasting money to produce what is basically a very short shelf life project description.
2. Showing them a fully-designed, complete looking sales brochure would detract from the idea that their opinions matter. A final draft suggests that getting their feedback is merely a formality that will not impact the real goals of the campaign or the final Case for Support.

## **Audience**

The campaign case must appeal to as many different kinds of donor groups as possible. In some instances individual cases are created as “pull-outs” from a main case. In this way, donors see the big picture, but are also able to bring the focus down to just those projects they find really appealing. A comprehensive campaign to build a new hospital, then, can be split into targeted pieces with more explicit detail about the Cancer Center, the ER, the Women’s Center and so on.

With a test case, your audience is that small group (30-40 people usually) who already know your institution well. This means, first, that you don’t have to sell them as much on your past successes. They know you—but they may not know about the people you help every day. That should be your focus, not describing your organizational structure or history.

Who your audience is not: your CEO, your President, your deans, or your division heads. Keeping this in mind as you work on your 15<sup>th</sup> draft of a case is often easier said than done, especially in higher education when so many people must approve the case, so many people want their voices heard. Culling the message down and speaking with words (not jargon) the donor understands and takes to heart is challenging but critical.

## **How to Write a Compelling Test Case**

Now that we've addressed for whom this version of the case is written, why it's written, and how it should look, we can delve deeper into the actual content and style. Bear in mind that cases—both campaign and test—are trending towards the brief. What was once a 20 page treatise is now a 1-2 page, succinct document a donor can read—or skim—in just a few minutes.

This new format makes weaving just the right of emotion into an information-packed piece a real challenge, but we have found it much more useful than longer documents. After all, if potential donors don't actually read the case, their opinion is not informed, they are less likely to become emotionally invested in your projects, and your study results are less likely to be accurate and actionable.

So, how can you too craft one of these powerful documents?

Do:

- **Define your vision.** Donors want to see that these projects weren't chosen in a vacuum, but rather that they are tied to your strategic plan and vision for the future.
- **Balance heart and head.** While I love a good, emotional story, not everyone does. Remember as you write your case to carefully weave together both your data and your emotional appeal. Try to balance each set of figures with those more personal accounts that solidify your point. Likewise, make certain that your most powerful, over-the-top stories are then supported with thoughtful solutions based on facts and a realistic plan.
- **Be specific.** "Buy technology" may sound like a good bullet to you but your donors want to know what kind of technology.
- **Be specific about impact.** While offering details on the new "WhirlyGig 4000" shows that you have done your homework, what is more important is being detailed about how this technology will actually change lives. "The WhirlyGig 4000 will reduce surgery times by 50% and cut the chance of infection to just 2%. This technology will ensure more patients get the treatment they need and improve their chances for not just surviving their diseases but recovering faster than ever before."
- **Be honest about finances.** If you have a \$50 million project for which you already have \$40 million from another source, tell your donors that. Let them know that someone values your project enough to provide that support, but also be very clear about how important it is that you receive the remaining \$10 million. Sometimes describing the impact of not receiving that \$10 million makes a strong case for giving. If your non-profit status is not well-known, it may be a good idea to remind prospects that you don't, in fact, receive government aid, payment for services, etc.
- **Drill down.** As our friends at the Rensselaerville Institute always ask, "So what?" What seems a clearly important project for you may not resonate with potential donors until you drill down. "We need a new battery operated phone system." **So what?** "We need to be able to reach first responders during a disaster." **So what?** "If we can reach first responders quickly, they can get to flash flood areas quicker." **So what?** "We can ensure that our community's families will survive disasters." Be specific and personal and get to the real core impact.

- **Write like you're speaking.** Certainly, this document should be professional, but this is not a grant application or an annual report. Remember that most of your donors don't want jargon and they don't want to be "sold." Instead, imagine when you're writing that you're sitting down with a friend or colleague, sharing an incredible opportunity.
- **Remember urgency is good, hyperbole is not.** We're all tempted to proclaim our organization the best, most amazing place and, therefore, any project in our future must be incredible and important beyond description. Unfortunately, savvy donors just don't buy this language. Instead, be honest and forthright about the need and detailed about the transformational effect the projects will have, but leave the over-the-top proclamations to the marketing writer.
- **Be nice to the marketing writer.** If your organization is on the large side, you will have one department that writes brochures, another that writes web copy, another that writes letters, and you write cases. In order to reinforce a cohesive and consistent brand and use a style your donors will find familiar, get familiar with the materials your organization puts out. Great stories, language, photographs, quotations that appear in numerous pieces are clearly important to your organization and you may want to bring them into your document. Donors will feel "in the know" that they've seen these before so you're not only building your brand, you're cultivating your donor.

The secret of a great case? Tell personal stories in a personal way. Remember that your donors aren't robots and they aren't bank accounts. They are people. They have alma maters, they have families who sometimes get sick, they have pets, they like art and they have hearts.

Your job as a case writer is to find that soft place in their hearts by telling a good story about the people—or better yet, the person—whose life will become better because your donors chose to give.



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