



# Making a Case for Giving: Tools & Treasures

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# Tap into the “MOTIVATION” we share with Donors, Staff, Volunteers

- “If one lights a fire for others, it will also brighten one’s own way.”

*--Buddhist aphorism*

# Two Fundraising “Rules”

“You have to **earn the right** to ask for a gift.”

“He who has the gold makes the rules.”



# What would you say if you were asked....

- Tell me why your organization is important? Why should I care?



What would your CEO say?



What would your board  
members and volunteers say?



What would your  
clients/partners say?



What would your DONORS  
say?



# Every successful non-profit organization needs:

- Influential & committed board (WWW)
- Highly experienced, results-driven CEO, and
  - A mission statement
  - An “elevator pitch”
  - A case for support
  - Ways to invest

CEO, staff and board need to be “fluent” in the case (not just familiar)

AND



# **COMMITTED and ENGAGED DONORS**

# How to get everyone\* ready for the opportunity

- You ARE NOT and SHOULD NOT be “in this alone”
- It DOES “take a village...”
- CEO, board, volunteers, clients, partners, donors can play powerful roles
  - Advocates
  - Formal testimonials
  - Suggesting other donors and volunteers
  - Develop and test case, solicitation, stewardship

ALL ARE VALUABLE and OFTEN UNMINED TREASURES!

# What to do...together:

- Develop a **case for support**
- Develop a **plan to execute**
- **EXECUTE**
- **Shared** Responsibility and Opportunity
- “Evergreen” Process

# Why do you need a case?

- It is your organization's comprehensive, written fundraising toolkit
  - Clearly communicates YOUR story in YOUR words
  - Clearly defines needs you aim to meet
  - Describes who benefits from your org and how
  - Defines who cares and why
  - Conveys effectiveness
  - Demonstrates track record of success
  - Offers points of distinction vs. competitors
  - Creates sense of urgency and legitimacy
  - Can define what you do and NOT do
  - Assures board, leadership and staff alignment
- Creates and conveys excitement
- Builds TRUST!

# What IS a case for support?: Develop an “investor” mindset

- A cogent, concise & compelling description of your organization's mission and track record developed to inspire and motivate an **investors'** commitment to your organization
- Speaks to each major donor's/constituencies' interest
- Includes
  - Needs/problems addressed—CLIENTS' needs NOT org's
  - Inspirational and aspirational
  - Goals and objectives
  - Description of clients/audience
  - Why your org?
  - Why NOW?
  - Client-centric and Donor-centric
    - Compelling needs you meet for clients
    - Compelling desires/needs you meet for prospective donors
  - Facts & figures
  - Leadership (CEO, Pres, Board)
  - Effectiveness
  - ROI
  - Summary of other supporters/donors

# What does a case look like?

- Can take various forms take all clients and prospective donors into account-- Don't lean on expensive publications to try do YOUR work
  - One page or a series thereof
  - Pamphlet
  - Brochure
  - Website
  - Talking points for staff & volunteers
  - Photo album (Shutterfly, iBook, etc)
  - Video
  - Podcasts
  - Social media
  - Talking points for CEO, staff, board, volunteers

Cost should NOT be the driver

- Clearly demonstrates client needs, goals and results
  - Facts & figures—BE SPECIFIC
  - Compelling photos, infographics and brief editorial
  - Testimonials: clients and board
- Other communications pieces that relate to the donor's interests

# How to use it?

- Base of messages for:
  - annual giving solicitations
  - mtgs with major prospects
  - funding proposals, events
  - reports to board, donors, clients, community, government officials
  - clients
  - PR messages
  - Stewardship messages



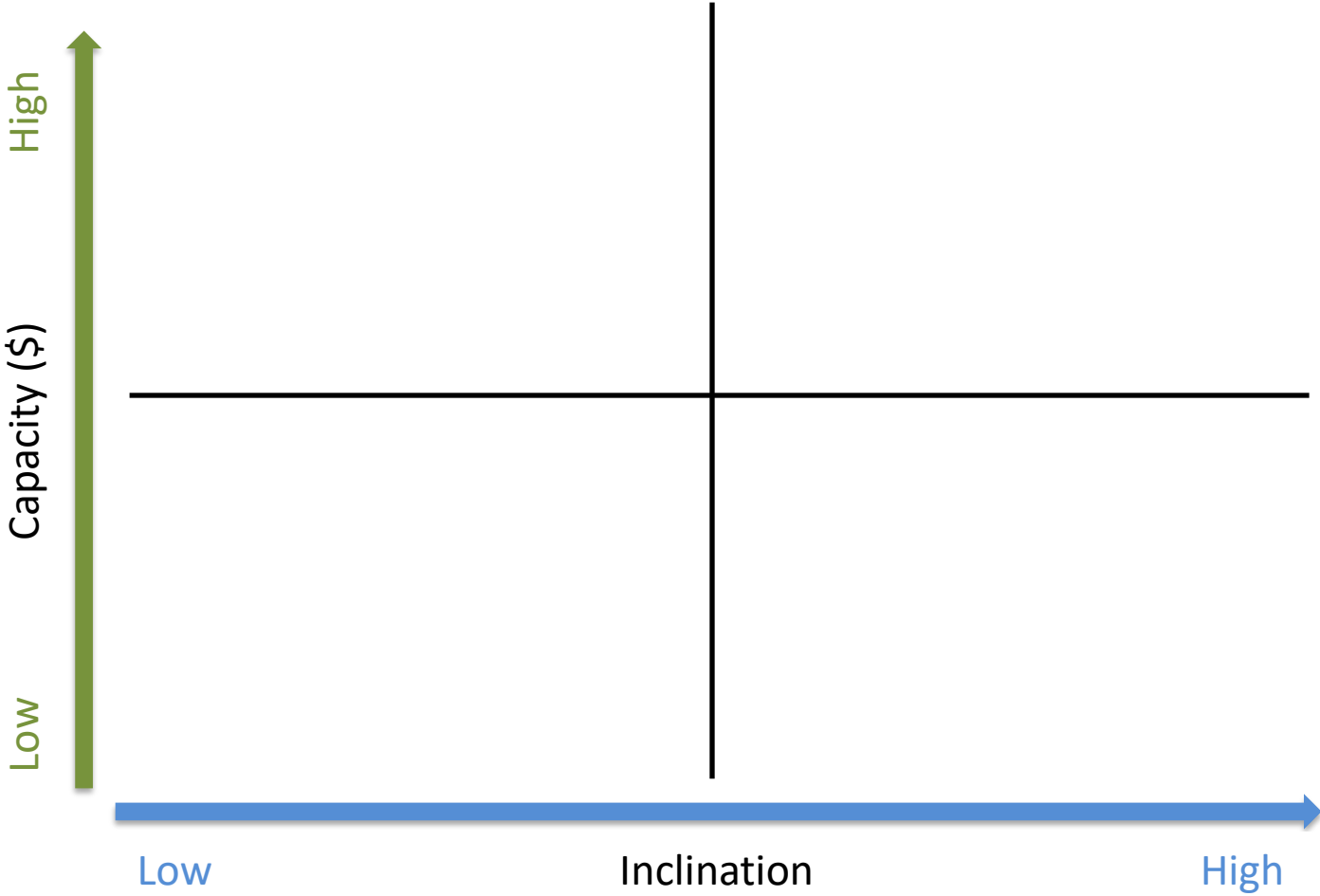
# Who uses it?

- CEO/President
- Development Director
- Other staff
- Board
- Volunteers
- Donors
- Clients

# Putting the case to work: Increase your chances for SUCCESS

- Stay focused on high value, high probability prospects
  - past major donors
  - qualified individual prospects known to board & org
  - Foundations and corporations that have aligned funding objectives

# Relationship Values



# Increase your chances for SUCCESS

- Focus on your consistent donors

# Building Donor Relationships

Inform → Involve → Invest

1<sup>st</sup> → 2<sup>nd</sup> Gift

“Door Open”

2<sup>nd</sup> → 6<sup>th</sup> Gift

Opportunity

6<sup>th</sup> → 8<sup>th</sup> Gift

Loyalty

8<sup>th</sup> Gift Forward

Commitment

# Increase your chance for SUCCESS

- Steward and celebrate donors: biggest missed opportunity!
  - Report on impact & ROI—the “why should I care?” as well as dollars raised and % of giving
  - Personal—“messenger” as well as the method
    - Personal visits, phone calls, handwritten notes, handmade gifts & cards, signed photos from events, smart phone videos, etc
    - Peers, VIPs, clients, volunteers; not just CEO & staff
  - Regular vs. frequent
  - Celebrate loyalty as well as dollar levels
  - Patron levels (\$ & loyalty) should be experiential and distinctive: “FEEL” the impact
  - Can never say “thank you” too often, if genuine

# Planning, Execution, Patience

- Develop a case
- Share and become fluent in the case
- Make an action plan
- Execute on the plan
- Measure results
- Refine the action plan as needed
- Give it time....it TAKES time!