BUILDING A STRONG CASE FOR SUPPORT

Case Studies

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Welcome!

About the Friends of the Texas Historical Commission
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What we will share today

- Brief overview of fundraising during the COVID-19 pandemic
- Communications and planning during the crisis
- Building a case - Key terms
- Why a “case for support”?  
- The Case as a story
- Putting it to work – case studies
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The COVID-19 Pandemic

- Isolation and self quarantine
- The talk about the “Coronavirus recession”
- The sudden economic shock and aftermath – the current economic instability downturn is due to external influences rather than internal economic speculations
- Several unknowns
  - When the “hibernation” will stop and when we can go back to close-to-normal economic behavior
  - What will that mean for charitable giving – best case and worst-case scenarios
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Impacts on Non-profits

- Isolation and self quarantine means changes in economic behavior
  - Less spending, less giving
- Loss of personal contact with constituents/clients and donors/members – may mean loss of visibility, and decrease in revenues
- Orgs not on the “frontlines” more negatively impacted
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Focus on the Basics

- Communications
- Cultivation and stewardship
- Should we be asking right now?
- Adapting programs for the “new normal”
- Prepare and plan
- Engage your leadership
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Focus on the Basics - Communications

- Do not go dark - your donors and your constituents/clients want to hear from you
  - Continue your communications and outreach – newsletters, etc.
  - Personal correspondence
- Critical - In all your communications, lead with a message of empathy
  - Messaging is key – acknowledge the situation
  - Your donors are in the same situation as you are – make sure you are understanding of how they might be impacted
  - Use social media, but be sensitive
  - Provide “insider” updates on your programs
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Focus on the Basics – Take Time to Plan & Prioritize

- Now is the time to step back and take stock – reaffirm your mission and values
- Make sure your programs align with your mission
- What is your unique selling proposition?
- Prioritize and scale back if necessary
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Key Terms

- The Cause
- The Case
- The Case Statement
- Case Expressions – specific communication (print, online, etc.), marketing (brochures, etc.), fundraising (proposals, annual appeals, etc.) that include elements of the case statement.
- Internal Case (Case Resources and Statement) vs. External Case (Case Expressions)
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“Start with Why”

Source: Simon Sinek, TED Talk – How Great Leaders Inspire Action
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Purpose of a Case Statement

- To offer a detailed rationale for a fundraising campaign
- Meant for internal as well as external use
- A key piece of information that can be shared with stakeholders to drive consistency in messaging
  - Share a consistent message with critical information
  - Content for communications, marketing, and fundraising
- Help build funding support for mission delivery & org. sustainability
  - Implement your strategic vision
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Stories are to nonprofits what statistics are to corporations.
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Building a Strong case – Effective Storytelling

For the case to be effective, it should answer the following questions:

- Why is your mission unique?
- How are you going to accomplish that mission?
- What are you asking the donor to do?
- What is the impact on the constituents you serve, on people’s lives?

An effective case needs good storytelling, backed by facts and figures.
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Components of a Strong Case

- The story in words – the narrative (statement)
- The Story in Numbers – budgets and financials
- The Story in Impact – Evaluation
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The Story in words – The “Case Statement”
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The Story in Words – A Strong Narrative

- Why does your organization exist? What are its beliefs?
- What is the need in the community that you are addressing?
  - Do you fully understand the need and the urgency?
- Outreach – Is there an awareness problem? Is the need communicated effectively to your audience (donors)?
- Are you speaking the language of your audience?
  - Make issues simple to understand, not simplistic
- Invest in outreach - Community engagement a priority
- Important AND urgent
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The Case for Support….

- Donor-oriented / donor-facing
- Clearly illustrates your organization’s mission and vision for the future
- Offers a statement of needs (in the community) that the organization is trying to address
- Tells donors how, if resources are available, those needs will be addressed.
- What is the investment needed and what outcomes you are seeking from that investment
- What is your call to action for the donor – your ask.

*Case statements cast a bold vision for a better future and invite donors to get caught up in that vision.*
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Key Narrative Elements of a Case Statement

- An emotional opening – pack an emotional punch
- Your mission and vision – Why does your organization exist?
  - History of the organization – Talk about accomplishments till date
  - A description of current programs and proof of impact
- What is the critical need in your “community” that you must address?
  - How much investment is needed and for what? Why now?
- How will you address these needs? Program, Projects?
- Clear programmatic goals and objectives - outcomes expected?
- How will you evaluate success? – Outcomes vs output
- What is your call to action for your constituents/donors?
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“A lack of method is not the definition of the problem.”

Is this the Problem? Instead of:

- There is no tutoring program
- Museum does not have enough space
- There is no training program for avocational archeologists
- There is no Museum at San Felipe

Describe the current situation:

- Juvenile crime rate is increasing
- Public does not have access to a large portion of an art collection
- There are not enough professional archeologists in the state to address the research needs
- The significance of San Felipe will be lost to future generations because there is no extant structures to be preserved, only the archeology and the archival research
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Goals and Objectives

Define your project in measurable terms

- State your **goals and objectives** for the project as they relate to the mission
  - **Specific**
  - **Measurable**
  - **Achievable**
  - **Realistic**
  - **Time-bound**

- What are the **expected outcomes**? What do you hope to accomplish with the funding?

- What is the **project timeline** - When will your project be completed?
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The Story in Numbers – The Budget and Financials
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The Story in Numbers

- The budget – what is the needed investment ($s)?
- What is the health of the organization?
  - Financials
  - Audits
  - Form 990s
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The Story in Numbers – Budgets and Financials

- **Budget:**
  - Can the project be completed with this budget?
  - Are expenses reasonable for the market and project – or too high or too low?
  - Is the budget consistent with proposed activities?
  - Is there sufficient budget detail and explanation?
  - Are you including the full cost of the programs/projects?

- **Financials:**
  - Audits and financial health
  - Financial management
  - Taxes – grants received, oversight and governance

Never forget that you will be using other people’s money to accomplish your organization’s goals!
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The Story in Numbers – The True Costs

Source: A graphic Re-visioning of Non-profit Overhead by Curtis Klotz, CPA
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The Story in Impact
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The Story in Impact

- **Assessment vs. Evaluation**
- **Qualitative vs. quantitative data**
  - Tie in with objectives; use anecdotes
- **How will you review your projects and programs?**
  - What changes should we expect to see?
  - What are the measures? Data collection strategies? How will you document?
- **Do you have all the necessary processes in place to measure?**
  - Show preparedness
- **Who will conduct the evaluation?** - Internal vs. external; gather testimonials
- **Measure outcomes, not output** - Funders want to see impact, not just effort
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Designing the Evaluations - Questions

- What is the purpose of the evaluation?
- How will you use the findings?
- What will you know after the evaluation that you didn’t know before?
- What will you do as a result of the evaluation that you couldn’t do before because you lacked the relevant information?
- How will the program better serve the clients/community?
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Taking it on the Road
Case Studies
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Case Studies

- Organizational Case
  - Habitat for Humanity

- Case Statement for Capital Projects
  - San Felipe de Austin State Historic Site Museum
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Help us today.

Habitat’s strategic plan supplies the framework for exponentially expanding our worldwide impact so that we can partner with more families to build or improve places to call home.

Our Global Impact Fund supplies the flexible funding for that expansion, which enables us to build impact at the community, sector and society levels.

Habitat’s Global Impact Fund moves our mission forward by:

- Leveraging resources to respond to the world’s housing need.
- Building the capacity of our global networks.
- Investing wisely to sustain our programs through tough economic times.
- Designing innovative programs that reach ever-growing numbers of families.
- Practicing good stewardship in order to increase our efficiency and ensure the trust of our generous donors.
The Campaign for the Development of the San Felipe de Austin State Historic Site

With its mission to preserve and promote significant cultural resources on behalf of Texans, the THC is committed to realizing the tremendous historical potential of the San Felipe de Austin State Historic Site. The timing of this project is opportune, because San Felipe de Austin will celebrate the 200th anniversary of the battle in 2022.

Conclusion

The story of San Felipe de Austin is a story of leadership, vision, and tenacity that demands to be more fully told. For decades, the story of the birth of the Republic of Texas has been told piecemeal. Until now, those pieces have formed an incomplete whole, with a key piece—San Felipe—missing. To truly understand the birth of Texas as a nation and the depth and complexity of our State’s rich history, one must understand and appreciate the role that Stephen F. Austin and San Felipe de Austin played in Texas’ earliest days as well as on its journey to independence from Mexico.

An improved San Felipe de Austin State Historic Site, with its museum, enhanced exhibits, educational programs, and archeological opportunities will offer visitors a powerful opportunity to understand how many of the State’s most revered people and events can be traced back to this place on the banks of the Brazos River where the story began.

These improvements depend on the success of the capital campaign for the development of the San Felipe de Austin State Historic Site. Please join us in bringing this important chapter of Texas history to life for future generations by supporting this campaign.

~ ~ ~ ~ ~

Perini (Buffalo Gap), Gilbert Peterson (Alpine), Judy Richardson (Caldwell), and Daisy Sloan White (Houston).

Friends of the Texas Historical Commission (FTHC) is an independent nonprofit organization founded in 1996 to expand philanthropic support for the THC and to secure private support for THC projects not fully funded through state appropriations. Over the past two decades, FTHC has helped authorize at the preservation of the Texas Revolution. The story of this...
Population Benefited and Expected Impact

The Campaign for San Felipe de Austin State Historic Site

Once the museum is open to the public in April 2018, THC will fund the site’s annual operations through its biennial legislative appropriation, supplemented by public-private partnerships, efforts of local volunteers, and income from the endowment.

Selected renderings and a site plan are attached for your review.

Conclusion
The important stories of people and events at San Felipe de Austin are a missing piece of Texas’s past. Understanding what happened here will redefine the Texas Revolution story for generations of Texans and for future visitors to our great state. We hope the XXXXXXX Foundation will join us in bringing this important chapter of Texas history to life for future generations by supporting this campaign. We are deeply grateful for your consideration of our request.

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Senator Lois Kolkhorst, launched a capital campaign to fund the remainder of the project, which primarily includes the indoor exhibits and interpretation, as well as the town-site interpretative exhibits. Attachment 3, a list of the campaign committee members, as well as Attachment 4, a list of San Felipe de Austin State Museum is provided for your review.
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Planning and the Case

Institutional Plan/Strategic Plan

Project/Program Planning

Fund Development Plan (24-36 months)

Develop the Case

Communications

Marketing

Fundraising

Develop the Case Expressions

Annual Fundraising plan (12 months)

Develop the Case for Support
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A Few Additional Things…..

▪ Takes time to develop
  • Do your research
  • Testimonials
  • Create language and consistent messaging

▪ Who should be involved
  • Board
  • Volunteers
  • Clients/constituents
  • Staff/consultants
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Finally, Some Essential Dos and Don’ts….

- **Remember**
  - One size does not fit all
  - Make your case bigger than your organization
  - It’s about investment, not just a donation or a gift
  - Donors ask:
    - Why this organization? Why this project? Why now? Why me?
    - Do not focus on the organization’s needs, but on the community’s needs
    - Do not complicate

- **Review and revalidate**