

## How to use your Case for Support – and get the best value from it

A Case for Support is one of the most valuable tools in your fundraising toolkit. Yet many organisations don't use it to its full potential. Here's how to make sure yours becomes a living resource, not just a document on a shelf.

### What is a Case for Support?

A Case for Support is an internal resource that tells the full story of your organisation and why someone should support your fundraising campaign or project. Think of it as your source material – the foundation for all your external communications and fundraising tools.

It typically includes:

- Your vision, mission and values
- The challenge you're tackling and why it matters
- Your proposed solution (project or campaign)
- Evidence of need and potential impact
- Key people involved
- Financials and funding model
- Campaign timeline and targets
- Tone of voice, image library, brand guidance

It may live as a folder on your shared drive, with Word documents, spreadsheets, budgets, testimonials, photos and other resources. It's not usually shared externally, but parts of it will inform every donor-facing communication you produce.

**Be aware: The term “Case for Support” is also sometimes used to describe an external-facing summary document (usually a polished PDF). Be clear about what you're expecting - internal resource or external brochure.**

### How to use it effectively

Once finalised, your Case for Support becomes the anchor for your entire fundraising campaign. Here's how to use it:

- Create a glossy summary brochure for donors with pre-approved language and messaging
- Adapt it into funding applications, bespoke proposals, and pitch decks
- Develop different versions (1-pager, 2-pager, 4-pager) for different audiences

- Prepare materials quickly and consistently without reinventing the wheel each time
- Use it as a training tool for new team members or volunteers joining your campaign
- Share it with consultants, designers or freelance bid writers to ensure alignment

### **Top tips for getting the best value**

- **Keep it fresh:** Update it regularly to reflect the evolving funding landscape, add new case studies, or record recent achievements.
- **Avoid copy-paste syndrome:** Tailor each application or pitch. Donors can tell when you've just dropped in a block of text.
- **Stay consistent:** Ensure brand, tone and core messages remain the same across all your materials.
- **Agree expectations up front:** Be clear with consultants or team members whether you want an internal source document, a donor-facing summary—or both.
- **Use it collaboratively:** Invite fundraising, comms, leadership and delivery teams to input and use it. A shared understanding makes for stronger fundraising.

**REMEMBER:** A Case for Support isn't just a document - it's your fundraising compass. Use it well, and it will save time, reduce duplication, and strengthen your case every step of the way.