

Building Your Day School's Case for Support from a Donor's Point of View

Donors considering major gifts are similar to investors considering significant opportunities: they want solid information regarding the impact of their gift. Building an annual case is not the same as writing an appeal letter or admissions brochure. This is an annual exercise to remind your school leadership why you exist, what is most relevant to the community, and what could be achieved with increased funding. Every annual philanthropic case should include a “stretch” vision to encourage your donors to increase their investment and relationship with your school.

Every year organizational leadership should review and update the following outline and incorporate it throughout the key messages communicated by your development program.

ANNUAL PHILANTHROPIC CASE FOR SUPPORT OUTLINE:

Your Relevance

- Community context: What are the “big picture” communal issues that your school is addressing? What are the “big picture” educational issues that your school is addressing?
- How does these issues personally affect the donor?

How Do You Do What You Do?

- What is your educational approach, and why is it effective?
- What are your past and present accomplishments? (Use alumni as validation as much as possible.)
- Illustrate your professional and volunteer leadership strength to do this work

How Are You Financially Supported?

- Explain how you are funded and the impact of philanthropy (don't assume the donor understands your financial needs, especially when he or she is a parent who also pays tuition)
- How has your mission's success led to your current needs? If these needs are ongoing, why?
- What will increased financial support allow you to do? (This is important – you want donors to think about stretching)

This Year's Focus

- What are the school's challenges and opportunities this year? What are you going to do this year that is different, expanded, or new? How does it respond to students' needs?
- From your donor's perspective, “The more transparency you give me, the more I trust that you have carefully considered how you will use my gift.”

Community Benefit: Definition of Success

- This is where vision comes in: remind donors of the school's aspirations
- Include a story that makes your case personal, or focus on a section of the community whom the annual appeal would help directly, such as families receiving financial aid
- Issue a call to action – why do you need the donor's support?

- Sometimes an organization tells such a solid story that donors walk away very glad that the school is so successful and doesn't need their personal support. Don't forget to wrap up your great case with a solid, bold, and confident case for why you need their financial participation.

Wrap-up

- In making a significant gift, donors evaluate your mission in three ways:
 - Intellect: Is this a solid investment? Is the school well organized, with strong programs and needs?
 - Gut: Why should the school go to the top of my list of philanthropic priorities?
 - Heart: Is there a clinching point that pulls me in personally?