

Case For Support Primer and Explainer

Introduction

Reconsidering Museums, a three-year national project, set out to answer the question, what do museums mean to Canadians? Through a rearticulation of the value of museums and a rebrand of the sector, this project supports museums with the tools and language necessary to better connect with and serve their communities, deepening their relationship, and therefore their relevance, to the Canadian public.

As a sector, we understand the significance of museums and museum work. By generating dialogue about how and why museums matter to Canadians, this project empowers museums with a shared language to express our value, to increase meaningful engagement, and to create a more sustainable and relevant sector.

The resources developed through this project provide adaptable values-based messaging that bridges the gap between museums and their publics, substantiate the value of museums with data-driven insights, and help shape public dialogue around the vital role of museums in our society.

The Case for Support, and associated Primer and Explainer, is one of the resources that we have created as part of *Reconsidering Museums*. It is an adaptable fundraising document created to support museums to develop an evidence-based Case for Support for advocacy and fundraising in their communities.

All data collected as part of a 2021 national survey, *Museums for Me*, undertaken as part of *Reconsidering Museums*. For detailed information on questions and responses, see the *Museums For Me: Engaging Canadians on the Future of Museums – What We Heard* report.



How to use this Resource

This package consists of three documents:

- this Primer and Explainer
- the Case Template
- a Case Template example

This package is designed to make it easy for you to prepare a case that will inspire those in your community who might be motivated to invest in your museum. The case will tell your story, and tell the broader museum story, with lots of opportunity for you to customize the document (or not), depending on your needs.

- **Step 1: Read What Is a Case for Support?** (below). This will help you understand why a case is an important tool for every museum. Donors who support and invest in your mission do so because they understand how, through their investment, your museum enhances the community. The case is the document that explains how and why.
- **Step 2: Open the Case Template and go through it page by page while you simultaneously read the Explainer** (below). This will help you understand the Template and your opportunities to make it your own. **Afterward, look at the Case Template example.** This will provide a practical example of the Case for Support in action and how it is possible to adapt the template to your museum and community.

Primer: What Is A Case For Support?

At its essence, the case for support (the case) answers the essential donor question: “why should I give you money now?”

To successfully answer this question, the case must demonstrate alignment with what a donor cares about and is close to their heart; it provides the opportunity for donors to create impact and a clear pathway to improving their community. It clearly states, in urgent and compelling language, why the donor is desperately needed to address a critical problem which, without their support, will have devastating results. It focuses from the outside looking in: what do donors see? vs. from the inside out, showing donors what we ‘do’.

American fundraising communicator Tom Ahern is widely regarded as the master of case writing. He’s written several books on donor communications, including *How to Write Fundraising Materials that Raise More Money* (Emerson & Church, 2010). Tom’s key points about crafting an effective case, combined with our best practices after 12 years of case writing, include writing a case which is:

- **Donor-centric.** Donors want to see themselves working alongside your organization to solve problems. The donor is a vital partner in the situation, creating positive community impact through your work. Keep the tone conversational, and use “you” often, speaking directly to the donor.
- **Emotional.** Neuroscience tells us that facts and figures lead to conclusions, but emotion inspires action. A case full of reason won’t inspire donors; an emotional narrative that paints a compelling picture inspires support. Donors must FEEL the case; it must be bold, passionate, and heartfelt. To be effective, it must cause an emotional reaction.
- **Urgent.** Why must donors care about this problem right now? How does your solution to the problem demonstrate hope and lead to stronger and healthier families and communities?
- **Formatted correctly.** An effective case follows a 3-stage format:
 - Dramatize the problem. What deficiency is rocking our communities that can’t be left unchecked? Provide back-up for assertions.
 - Present the best possible solution. State early how much money you intend to raise and summarize how it will be spent, going into detail in later pages. Show you are good stewards of donations, demonstrate cost efficiencies, and describe real accomplishments to inspire trust. Answer anticipated objections. Frequently link outcomes to donor support. Describe what will happen if this money isn’t raised.
 - Call to action. Recap the impact if this campaign is successful, and how families and communities will be better off as a result. Make the ask and make it emotionally compelling.
- **Content appropriate.**



- Use short sentences and action verbs; avoid jargon. Assume donors know nothing about your organization.
- Identify and include liberal use of testimonials: well-known, community leader donors who vouch for the importance of the project and why they support it and beneficiaries who have directly benefited from this or similar work of your organization. Third-party endorsements build credibility and momentum.
- Keep the case to 2,500 words or less; more is not better. Keep the narrative tight and focused; make every word count.
- Keep the case to multiples of 4 pages (i.e., 8, 12 or 16 pages, including the cover) in case you decide to have it printed.
- Use graphic images to draw in the reader: close-ups of faces looking directly at the reader evoke emotional connections. Use fewer larger and stronger images and avoid tile or collage images; people give to people, so incorporate images of people as much as possible. Avoid buildings and empty rooms; they rarely evoke an emotional reaction.
- Any images used must be high resolution and in focus. This is not the time to skimp on pictures; use only your best images.



The Explainer

Read this section alongside the Case Template. This section describes the purpose of each page in the case and suggests where you can customize content to suit your needs.

We will start by saying that literally any text or image in the Case Template can be edited, deleted, or replaced. However, this template gives you a head start on developing a case that will resonate with donors and is based on our many years of experience developing cases that are effective. A case never raises money by itself — people give to people — but a well-developed case inspires donors whose interests are aligned with your own.

The Case Template is provided as a Word document. If you have the capacity, you may decide to turn it into a design file in Canva, InDesign, or elsewhere. We wanted to make this as accessible as possible, so Word is the common denominator.

Cover and Page 1

The first page states the theme (“This is your museum”) and begins to engage the reader in the journey of a donor. It establishes points of connection for the donor and speaks directly to the reader/prospective donor, inviting them in.

To Make It Your Own:

- Replace the cover image with one of your own. Make sure it’s dynamic, compelling, and includes close-up faces looking directly at the camera.
- Insert your own museum’s logo on page 1.

Page 2

This page provides testimonial quotes which help tell your story. Ideally the quotes should be from an active community member of the museum and a donor whose name is highly regarded in the community. People will see themselves here and will be inspired to follow the lead of a well-known peer who advocates on behalf of the museum.

To Make It Your Own:

- Replace the quotes with quotes specific to your museum and your donors. Use the opportunity to ask others what makes your museum special to them and help them advocate on your behalf.
- Insert photographs of community members.
- Insert your own museum’s logo and information in the header and footer on all pages.



Page 3

This page sets the overall museum context and highlights the changing role of museums amidst societal change. It highlights some of the valuable and important data points collected from the survey of over 3,000 Canadians about the role of museums.

To Make It Your Own:

- Adapt the text highlighted in red and in [brackets] with your own information and community issues.
- Use different data points from the survey using the *What We Heard* report or fact sheets.

Page 4

This page provides an overview of what we heard from Canadians about the role of museums in their lives.

To Make It Your Own:

- Use different data points from the survey using the *What We Heard* report or fact sheets.

Page 5

This page describes how there is work to be done by museums to align programs and approaches to what Canadians want to see and experience in museums.

To Make It Your Own:

- Fill in the blanks (highlighted in red and in [brackets]) with your own information.
- Insert photograph(s) of your museum's work.

Page 6

This is where you begin to tell the story of your own museum and how you impact your community. This text touches briefly on your historical context, region, annual number of visitors, and programming highlights. The goal is to illustrate to the reader how you illuminate shared history and provide context and understanding of current events. It is not necessary to name every program; stick to the top three or four which generated the most community interest or attention. Donors want to see themselves in your story and this is where you can draw them in.

To Make It Your Own:



- Fill in the blanks (highlighted in red and in [brackets]) with your own information and program highlights.
- Insert photograph(s) of your museum's work.

Page 7

This page shares your vision with the reader. The first few paragraphs set the stage for changing museums in the broader context, then invites the donor to learn about where your museum is going and why: why are you raising money? What will you use it for? How will this vision, once realized, impact your community? Remember, donors want to see your vision and how their investment in that vision will pave the path forward to a changed community. Show them how you intend to do it.

To Make It Your Own:

- Fill in the blanks (highlighted in orange and in brackets) with your own information about your vision, how much money you intend to raise, what that investment will be spent on and how such an investment will improve your community.

Page 8

This page provides another testimonial quote which helps tell your story. Ideally the quote should be from the museum's Board Chair or senior leader (i.e., the Executive Director). People will see themselves here and will be inspired to follow the lead of a well-known peer who advocates on behalf of the museum.

To Make It Your Own:

- Replace the quote with a quote specific to your museum and your donors. Use the opportunity to ask others what makes your museum special to them and help them advocate on your behalf. The Board Chair is generally a volunteer and often carries a high community profile; they are another valuable voice in the case.
- Insert your own photograph(s) of community members.

Page 9 (Back Cover)

The back page is prime real estate for one final compelling quote, restating the theme which draws the reader in, and a final opportunity to state the impact of a donor investing in your museum.

To Make It Your Own:

- Replace the quote with another compelling quote from a donor or volunteer. We recommend using only one quote per person.



- Add your logo, contact information, charitable registration number, social media handles, and a sincere Indigenous land acknowledgement.

Ideas To Extend To 12 Pages

Expand the museum story you began on page 6. Provide more detail and accompanying images to illustrate programs and accomplishments.

Give a full page to the campaign information currently on the bottom of page 7. Provide more detail about the money you want to raise, how you'll spend it and the difference it will make in the community.

Give a full page to the fundraising ask currently located on the bottom of page 8.

Acknowledgements

Case for Support, Primer, and Explainer was prepared by Global Philanthropic on behalf of the Alberta Museums Association.



The Alberta Museums Association gratefully acknowledges the financial support of the Government of Canada through the Canada Cultural Investment Fund and the Province of Alberta through the Community Initiatives Program for the Reconsidering Museums project.

