

# Create Your Compelling Internal Case For Support

A blueprint of your organisation,  
& the foundation of your fundraising program

FUNDRAISING HOW TO TRACK

ELLAINE HISLOP

PERTH ZOO

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Perth Zoo

SAVING  WILDLIFE

Fundraising How To Track  
Sponsored By:

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# What will we cover?

1

## WHAT

What is a Case for Support and what kind of information do you need?

2

## WHERE

Where can you find the information?

3

## HOW MANY

How many cases do you need?

4

## REVIEW

When do you need to review or change it?

5

## USING

What can you use it for?

# And...

How I am doing this  
for Perth Zoo



# What is an internal Case for Support?

## Foundation

The building blocks of your fundraising program

## Why

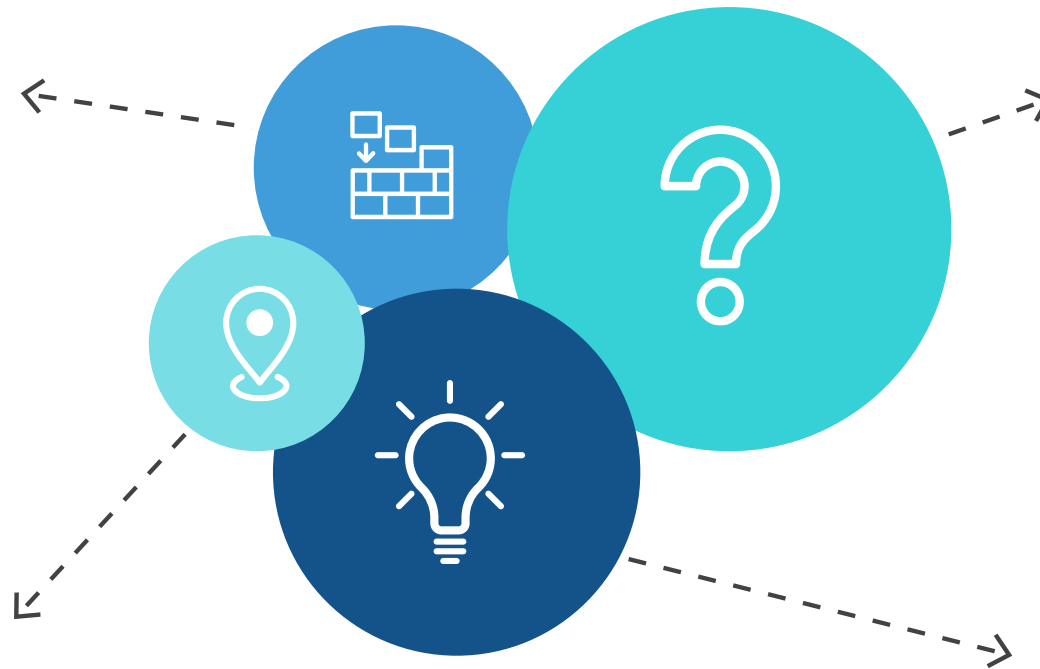
Why your cause exists and why should a donor invest in it

## Where

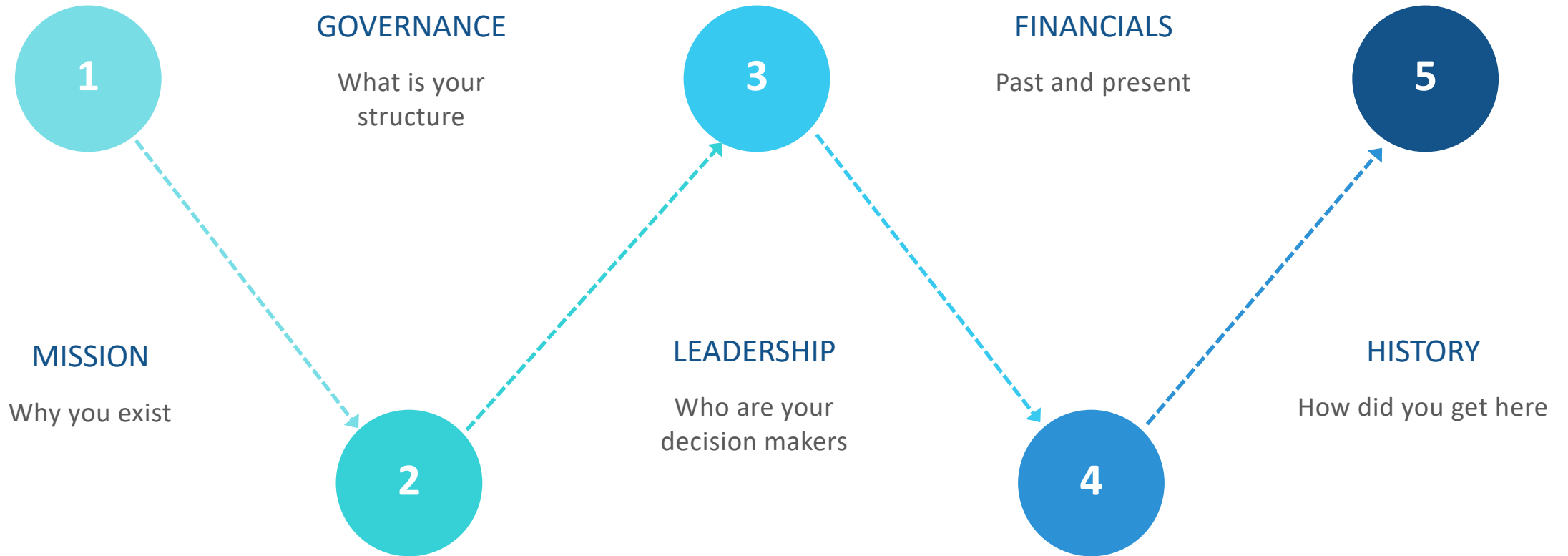
Where do you want to end up

## How

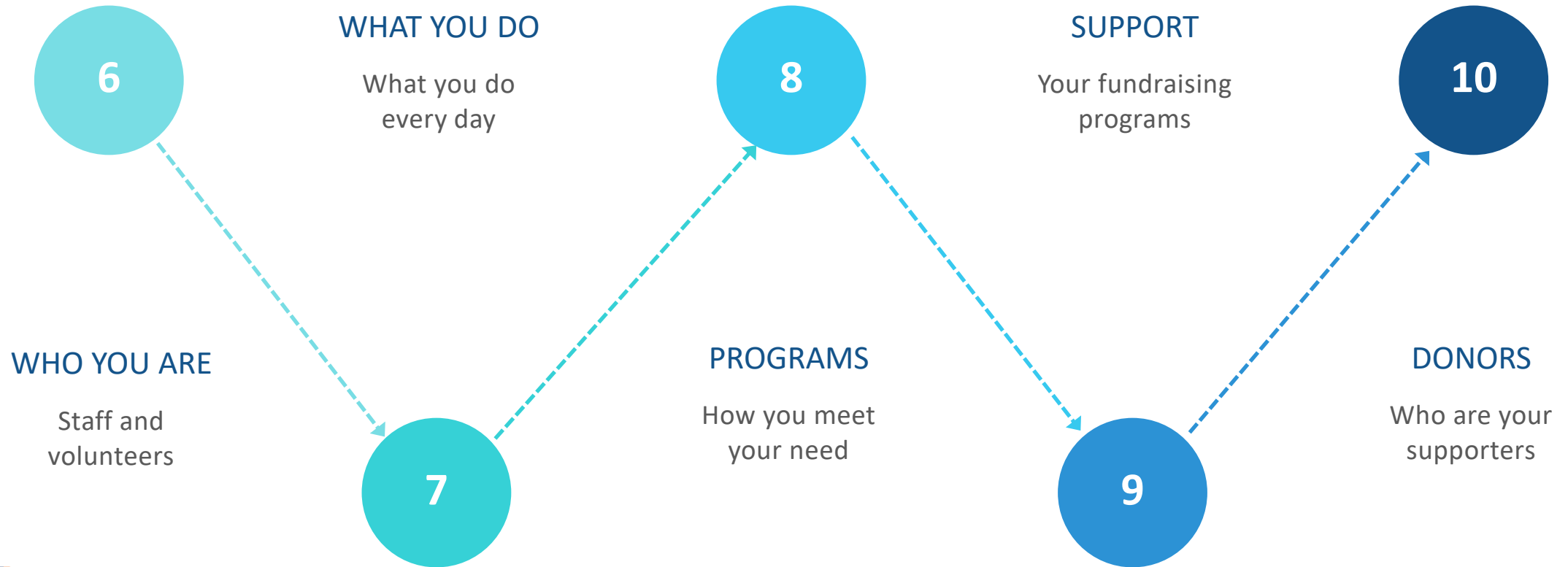
How do you get there



# What should you include?



# What should you include?



# Where can you find the information?



# Example – Pulling it together

Physical Folder

1



- 1\_Mission
- 2\_Governance
- 3\_Leadership
- 4\_Financials
- 5\_History
- 6\_Who
- 7\_What
- 8\_Programs
- 9\_Support
- 10\_Donors
- 11\_Supporting Documents
- 12\_Case Statements
- 13\_Resources
- 14\_Register
- Case for Support

2

Digital Folder

Register

3

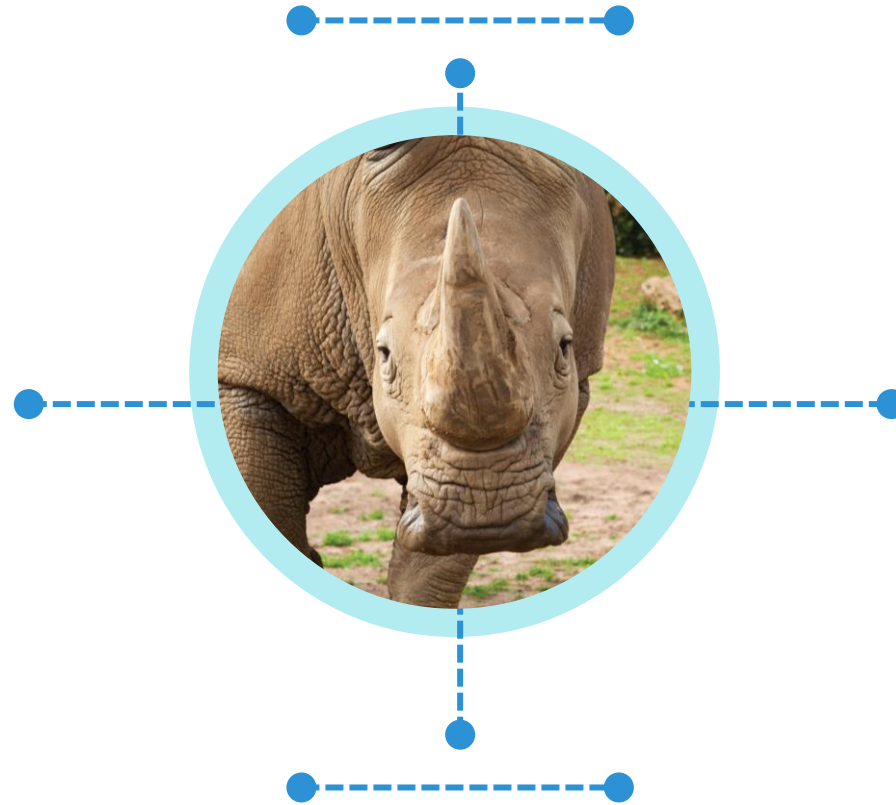
File Name	Purpose	Source Document	Link	Document Type	Date of Latest Update	Re
Vision and Purpose	PZ purpose, vision and values	ZPA Strategic Plan 2023-Final		JPG	October 2023	EI
Why PZ Exists		ZPA Strategic Plan 2023-Final		JPG	October 2023	EI
About ZPA and PZ	How PZ operates within the ZPA and other licences	ZPA Strategic Plan 2023-Final		JPG	October 2023	EI
Governance	How PZ is administered, which Minister is responsible, what the ZPA is and how it functions.	PZ Website	<a href="https://perthzoo.wa.gov.au/about-perth-zoo/corporate-governance">https://perthzoo.wa.gov.au/about-perth-zoo/corporate-governance</a>	Word	October 2023	EI
	The current governing body of the Zoological Parks Authority	PZ Website	<a href="https://www.dbca.wa.gov.au/perth-zoo/zoological-parks-authority-board">https://www.dbca.wa.gov.au/perth-zoo/zoological-parks-authority-board</a>	Word	January 2024	EI



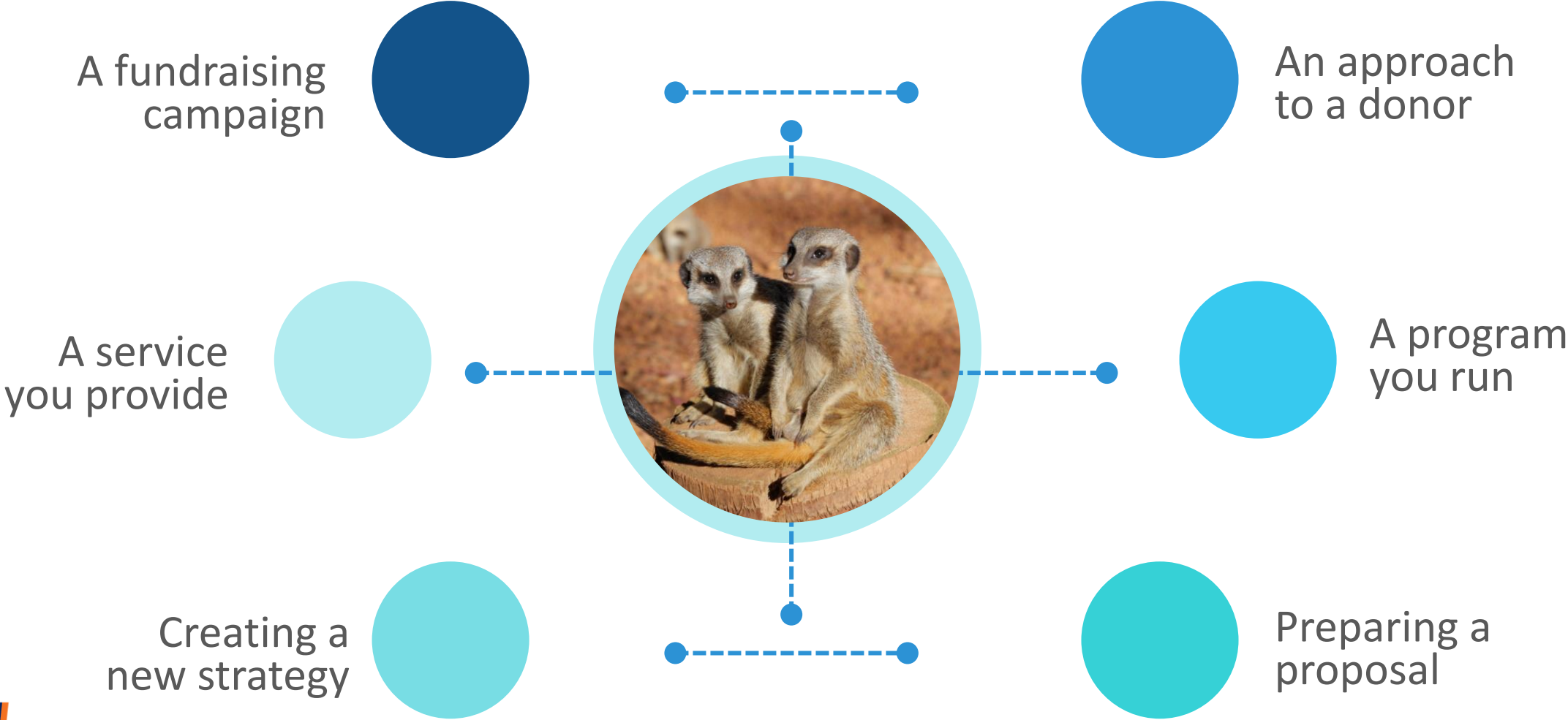
# How many Cases?



# Just one...



# But many Case Statements



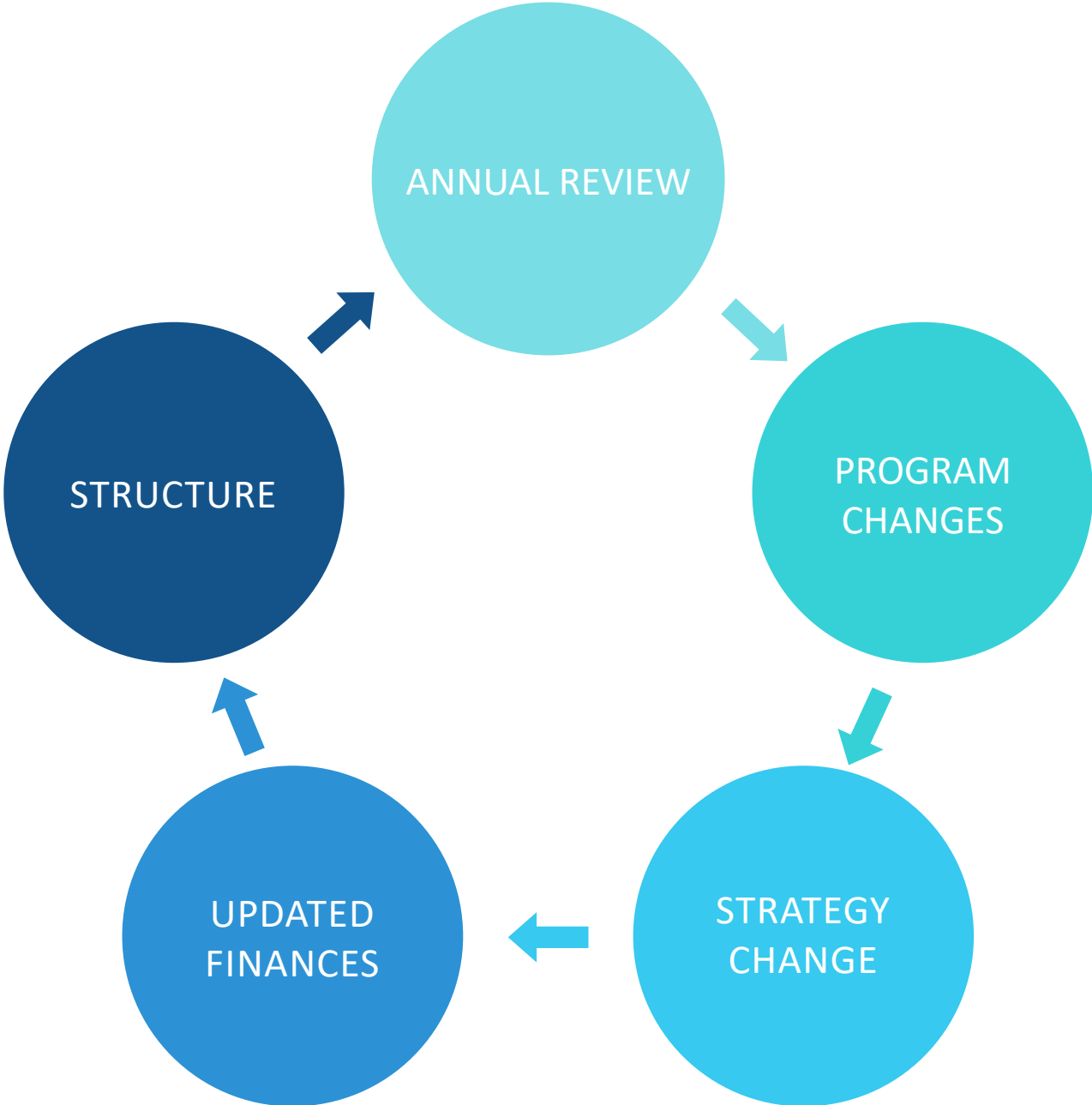
# Example – Case for Support

1

Case Headings



# When should you review?



# Examples – Time to review

New Strategic Plan

1



2



Big News

Mission Success

3



4



Annual Report

# Using your Case for Support



Direct Mail Appeal

Thank You Letter

Social Media Campaign

Fundraising Program Brochure

Major Donor Proposal

Capital Campaign Case

Grant Application



# Examples – How to use

Adoption Program

1



Gift in Will Program

3



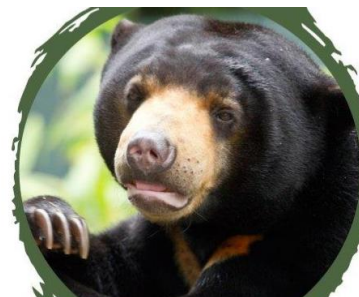
Direct Mail Appeal

2



Website Update

4



## CARE FOR ANIMALS IN THE WILD

Animals in the wild may still be at risk, but with your kindness, our conservation work will extend well beyond our gates.

Your compassion for animals in the wild will have a direct impact on at-risk animals in their natural habitat. Together, you and Perth Zoo, will care for animals in the wild around the world.

+ Find out more

[DONATE TODAY >](#)

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# Example – Case Statement

## Case Statement Orangutan Appeal

### To use for:

- Direct mail
- Email [campaign](#)
- Website copy
- Donation page
- Thank you [letter](#)

### **THE PROBLEM: Their future is in your hands.**

*Orangutans are a critically endangered species and clinging to survival.*

*We can't let this magnificent species become extinct on our watch. You can help save [them](#), because they can't save themselves.*

Orangutans are a critically endangered species. With 80% of their habitat lost, and thousands needing to be saved after being illegally kept as pets, they are clinging to survival.

Orangutans are still struggling for survival. With only around 14,000 left in wild and countless losing their lives every year, it is imperative we step in to bring this incredible species back from the brink of extinction. Despite orangutans being protected by law in Indonesia since 1925, young Sumatran orangutans are still illegally kept as pets. Their mothers are tragically killed, and the offspring sold to the illegal wildlife trade.

Our work for the survival of this special species doesn't stop at the gates of the Zoo. Saving wildlife is the driving force in everything we do, but we are just a part of a global initiative to save orangutans who can't save themselves.

They need intense rehabilitation and education at Jungle School for years to be ready for release. He doesn't have the skills he needs to survive in the wild. He needs to learn to be independent, to climb, to build nests, and even what food he can eat. They even have to get used to the sounds of the forest.

*"[Opid](#) was a small, 5-year-old male Sumatran orangutan clinging to another orangutan and using him as a security blanket when I first saw him. My heart broke. He should have been learning how to live a life in the wild with his mother. Instead, his short life had already been full of fear. I don't know exactly what his background was or what he had been through, but he was clearly so traumatised by his past. He was completely beside himself every time his friend was out of sight. He would start screaming until they were together again. Orangutans like [Opid](#) will need intense rehabilitation and education at Jungle School in Sumatra for years to be ready for release. He wasn't raised by his mother and never learnt the vital skills he needs to survive in the wild. First, he needs to learn to be independent. Then he needs to learn the basics like how to build a secure nest in the trees to spend the night, what branches will carry his weight, how to make shelter from the rain, what poisonous plants to avoid, and when fruit is ripe and safe to eat, along with the importance of non-fruiting season and reliance on cambium and leaves. And as you'll see in my enclosed field report, how to avoid bee stings! I hope [Opid](#) will get to live in the wild soon too. But until he's ready he'll be supported at Jungle School."*

### **WHY: Sumatran Orangutans are on the brink of extinction.**

Perth Zoo is the only Zoo in the world that has released zoo-born orangutans in to the wild. With the support of our generous donors, we can continue this important work and support programs on the ground in Sumatra.

We need to help protect this species and re-build their population. Our partner at the Open Orangutan Sanctuary works tirelessly on their rehabilitation and release in the wild. Meanwhile our team at Perth Zoo will work just as tirelessly in our own back yard to ensure this precious species will be preserved in the safest and enriching environment we can provide.

The experience our staff have gained at Perth Zoo looking after our orangutans helps inform the staff at OOS. Such as the different kinds of enrichment devices they can use to help with their rehabilitation and share the training plans and operating procedures we use at the Zoo. And they share their experiences so I can bring learnings from the field back to Perth Zoo like the different nutrition and diet that orangutans in the wild are exposed to.

With fewer than 14,000 Sumatran Orangutans reported to remain in the wild, it is devastating that this number is still decreasing. It is urgent that we step in now to bring this incredible species back from the brink of extinction.

### **PLAN: Jungle School at the Zoo and in the wild.**

Jungle School is critical to the survival of the orangutans by keeping a secure population in a zoo in the most natural way possible. With support orangutans will be put through Jungle school at Perth Zoo and in the wild. This critical program in our own back yard is vital to the survival of this species. It ensures a secure population of this threatened great ape is safe.

Just as in the wild, there is no typical day for our resident orangutans or their zookeeper carers. Their needs are all so different that each orangutan is managed individually, not as a group.

- Teliti is newly separated from her mother and is starting to gain more confidence. We've developed a training plan for her to get her used to male company so she can be a mum one day.
- Puteri is an older lady, and she has just had her occupational therapist appointment to make sure her joint health is ok. She's so clever and has learned how to moisturise her hands herself.
- Dinar our impressive male is blind in one eye, so his remaining eye health is of vital importance. Recently he had his regular eye health check and then we brushed and flossed his teeth. This highlights the benefit of the regular training we do. Dinar is happy to show us his eye so we can monitor his optical health then lets us take his temperature and take blood when we need to.

Everything we plan for them each day ensures their experiences are undertaken with their welfare as a priority. We make sure that all eight orangutans have great quality of life by focusing on their mental state, their nutrition, their health, their behaviour, and their environment.

- Jungle School is critical to the survival of the orangutans by keeping a secure population in a zoo in the most natural way possible.
- And in the wild to give ex-pet and illegally trafficked orangutans a chance at living a life in the wild in Bukit Tiga Puluh, a protected ecosystem in Indonesia.
- People who care about wildlife can protect them from extinction and ensure there is always a safe population of orangutans.
- Jungle School at Perth Zoo ensures our eight resident Orangutans are cared for in using the best welfare standards.

### **RESULT: Ready for Release.**

Donations will help give our orangutans at Perth Zoo's Jungle School the best welfare and care and continue to inform and help care for the orangutans at Jungle School at OOS.

It will help give orangutans in Jungle School at Perth Zoo and in Sumatra, the best welfare and care. And a chance at survival

Orangutans like Opid will receive the intense rehabilitation and education at Jungle School in Sumatra for years to be ready for release.

Our partners in Sumatra at SOCP FZS jungle school and release sites work tirelessly in the field on the rehabilitation and release of orangutans in the wild to ensure the survival of this species. We benefit from working together and sharing experiences to make sure Jungle School is fulfilling the unique needs of the orangutans in both Perth and Sumatra.

### **SUPPORT: How you can help.**

*Support Jungle School for orangutans at Perth Zoo and in the wild.*

We need to help protect this species and re-build their population. Our partner at the Open Orangutan Sanctuary works tirelessly on their rehabilitation and release in the wild. Meanwhile our team at Perth Zoo will work just as tirelessly in our own back yard to ensure this precious species will be preserved in the safest and enriching environment we can provide.

Help orangutans go to Jungle School and learn how to live their best life before it's too late.

The team at Perth Zoo are just one part of a worldwide initiative to save Orangutans, because they can't save themselves. We need generous people like you to be part of saving these amazing animals too.

Breakdown for specific solutions.

At Perth Zoo:

\$24 = Mental State = enrichment item.

\$52 = Nutrition = meal / food item.

\$75 = Health = veterinary care.

\$126 = Behaviour = training by keepers.

\$257 = Environment = equipment.

In the wild:

\$30 = pays for a pair of boots for an orangutan tracker.

\$130 = pays for one week of orangutan training at 'Jungle School' in the wild.

\$150 = covers food for an orangutan for one month.

Your gift today will help give our orangutans at Perth Zoo's Jungle School the best welfare and care and continue to inform and help care for the orangutans at Jungle School at OOS.

# Example – Using the Case Statement



**“Please help save these amazing apes from extinction – they can’t save themselves!”**  
*Holly Thompson*

Dear <First Name>,

I’ll never forget the first time I saw Opid. After 20 years working with orangutans, and on my ninth visit to our partners Frankfurt Zoological Society (FZS) at the Sumatran Orangutan Conservation Project’s (SOCP) sanctuary, I thought I was ready for anything.

But when I saw this small, 5-year-old male Sumatran Orangutan clinging to another orangutan and using him as a security blanket, my heart broke. He should have been learning how to live a life in the wild with his mother. Instead, his short life had already been full of fear.

I don’t know exactly what his background was or what he had been through, but he was clearly traumatised by his past. He was completely beside himself every time his friend was out of sight. He would start screaming until they were together again.

It was heart wrenching!



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Sadly, the three species of orangutans (Bornean, Sumatran and recently discovered Tapanuli) are **critically endangered**. The Sumatran Orangutan has experienced a 50% decline in population numbers within three generations!

Sumatran Orangutans are one of the world’s top 25 most endangered primate species. If this population trend continues, it is predicted the Sumatran Orangutan will become extinct in the wild, in our lifetime!

**We can’t let this happen on our watch!** Your gift <of \$>A Sumatran Orangutans and other endangered species.

**Generous people like you can be part of saving these apes because they can’t save themselves!**

Orangutan’s habitat is being destroyed by fires, cleared for timber and mining. They’ve lost over 80% of their natural habitat alone, and thousands lose their lives every year.

Young orangutans are illegally kept as pets. Their mothers’ their offspring sold to the illegal wildlife trade. By some word clinging to survival.

With fewer than 14,000 Sumatran Orangutans reported to : devastating that this number is still decreasing. I can’t stress er we step in now to bring this incredible species back from the b

My team at Perth Zoo works tirelessly to ensure this precious species is preserved in the safest and most enriching environment we can provide. Since 1970 there have been 29 successful Sumatran Orangutans born and raised as part of a Species Management Program within Australasia and beyond our borders. Without this vital insurance population, we risk losing this amazing species forever.



Please make your generous gift <of \$>Ask1 or even \$Ask3 if you are able, >to join me and my team on this journey to save a species.

Our work for the survival of this special species doesn’t stop at the gates of Perth Zoo. Saving wildlife is the driving force in everything we do, but we are just one part of a global initiative to save orangutans like Opid who can’t save themselves.

I regularly visit our partners in Sumatra at SOCP FZS jungle school and release sites.



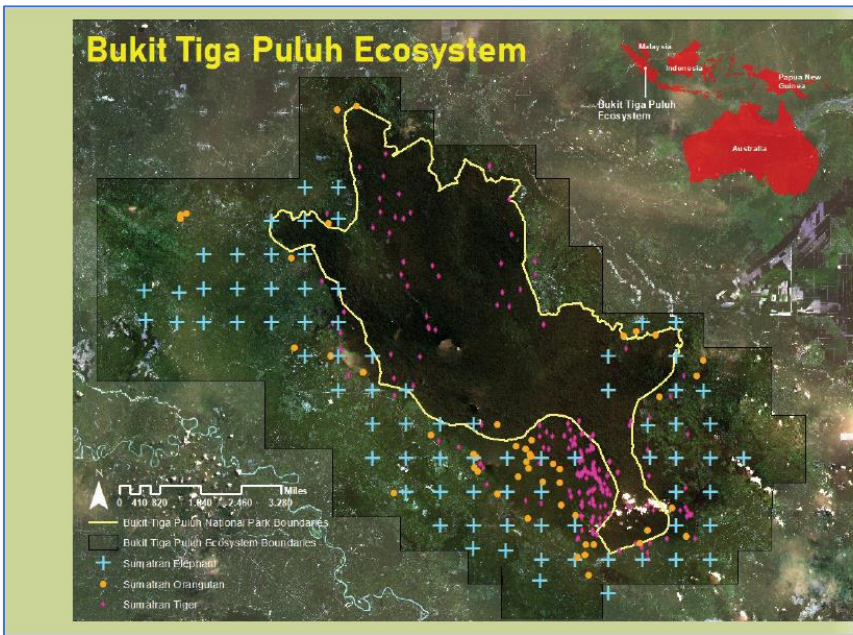
If undeliverable, please return to:  
 PO Box 489, South Perth WA 6951  
 CM 23021525



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## BUKIT TIGAPULUH

We are working with partners to protect the sensitive boundaries of Bukit Tigapuluh National Park because elephants and orangutans live in the lowland forest fringes. Unfortunately, logging operations, agriculture and palm oil plantations have moved in too.

Perth Zoo keepers spend time in the field in Bukit Tigapuluh at the Open Orangutan Sanctuary and Sungai Pengiran release site to help in Jungle School and release efforts.

- Sumatran Elephant Sightings
- Signs of Sumatran Orangutan
- Evidence of Sumatran Tigers



## THEIR FUTURE IS IN YOUR HANDS

We can't let this magnificent species become extinct on our watch. Will you help save them? Because they can't save themselves.

### JUNGLE SCHOOL REPORT

**6:00am**  
Wake up to the sounds of the forest and get out of bed! I can hear gibbons - one of my favourite animals!

**7:00am**  
While the Jungle School trainers clean the orangutan enclosures, we eat a breakfast of local foods, even greens from the jungle that are steamed and delicious!

**7:30am**  
We go with the trainers to provide some food to the orangutans. This consists of forest foods such as rambutan and lots of branches laden with leaves, berries and bark to strip back.

**8:00am**  
The trainers get their equipment ready to track the orangutans at Jungle School. We need binoculars, cameras, food and water and a clipboard to enter data. The trainers set up the bait basket with food to encourage the orangutans from their enclosure to the jungle.

**8:30am**  
The trainers open the enclosure to let a couple of orangutans out for Jungle School. It is quiet and Balbon's howl in the jungle. They are 5-year-old males and climb along ropes to the bait basket to extract the food. The trainers set up the bait basket with food to encourage the orangutans from their enclosure to the jungle.

**9:00am**  
After some time playing on the ropes and eating their second breakfast, opid and Balbon climb into the trees. The Jungle School trainers now become trackers as they navigate through the forest stepping over branches whilst looking up into the canopy to try to see the orangutans. I am always in awe at how well they can locate them and have learnt to mimic from their vocal trillers.

**9:30am**  
We've tracked 150m which isn't far, however climbing a steep incline and with spiky rotten branches grabbing at our clothing we go slow. The orangutans crash around us, enjoying testing their weight on the branches and swinging on vines.

**10:00am**  
Opid and Balbon have stopped moving and start to forage on forest foods. The team can now enter in more data and I started to ask where Balbon is and can just see his foot dangling from an epiphyte. Opid is then visible due to often clinging to Balbon who has become like a security blanket for him.  
It's important for orangutans to learn from other orangutans due to not having mothers to play this vital role. Sadly, opid is especially traumatised and needs a friend close by to increase his confidence.

**11:00am**  
After quietly observing the orangutans, we move again and discuss the forest foods they are eating due to seeing remnants they have dropped.  
The experienced team provides insights into their favourite foods and the difference between seasons when foods are beautiful versus non fruiting season when resources are scarce.

**11:30pm**  
After recording data on the orangutans and putting our feet in the river, we hear an almighty crash. We look around and ask what's happening? Opid and Balbon have come into conflict with each other!  
We quickly get to a location where we can see them due to them coming towards the riverbank. We can see the large tree with the vine moving and hear screams from the orangutans. The trainers try to encourage them out of the tree but instead Balbon goes lower into the thick vines and takes cover. This allows them to rest and for the bees not to become agitated by the orangutan moving.

**12:00pm**  
Rest periods are important for orangutans, and we are happy to allow after more filters through the forest. They chose a tree with a large canopy covering it. We know they will likely stay here for a couple of hours so we go back to camp.

**12:30pm**  
After a nice lunch we make some enrichment with one of the trainers who has come back with us. We look around for items that are as natural as possible and settle on some bamboo. It is hard and strong, and we decide to cut long lengths and put their food in it. To make it more difficult, we pack in leaves. We hide the bamboo to the orangutans still in their enclosure and watch them eat this and the food it takes. We also put food items in the mesh enrichment devices that we helped construct a few years ago.

**3:00pm**  
We have gone back to the enclosures to provide more enrichment to the orangutans and lots of branches so they can build their nests for the night.  
While the orangutans are in their enclosures, we discuss training strategies and ideal orangutan combinations that can go to Jungle School to learn from one another.  
We wander back to opid and Balbon and are told they will spend the night in the forest due to not wanting from the comfort of the trees. This will be their first night in the forest and as much as we're nervous for them, they are close to camp and have gained valuable experience in the forest thus far.

**4:30pm**  
We check on the orangutans who are making their nests and are impressed by their skills. It is important for orangutans to make a nest to sleep off the ground at night.  
We listen to the sounds of the jungle and meet a few of the team who have been holding through the forest visiting updates for Jungle School where there are large fruiting trees for the next day's Jungle School.

**6:00pm**  
We eat dinner by the river and look out to where opid and Balbon are sleeping in the trees, knowing they are learning vital skills on how to survive in the jungle in the safety of the open orangutan sanctuary.  
We discuss the day's data and plan for the following day when Tage and Tage will go out into the forest and we can learn how they navigate Jungle School.

**7:00pm**  
After a few pages of time and writing my report, I retire to read in bed. I drift off thinking of opid and Balbon sleeping their first night in the jungle. I imagine they are scared but then I reflect on what their lives have been and where they are now and know they are safe and so loved.

**7:00am**  
We're up early to check on them and they are fine! Well rested and I can't detect any bee sting lumps! Our attention turns to the day ahead and I know there will be more vital skills to learn. All of this help was in my role at Perth Zoo caring for the orangutans.

## THE FIVE DOMAINS OF WELFARE

Everything we plan for the orangutans each day in Sumatra and at Perth Zoo ensures their experiences are undertaken with their welfare as a priority. We make sure that all eight orangutans at Perth Zoo have great quality of life by focusing on their mental state, their nutrition, their health, their behaviour and their environment.

### NUTRITION

\$37

All animals should have a balanced, varied, species-specific diet, and access to fresh water.

\$37 provides suitable food for an orangutan for a week at Jungle School and the release site if requiring supplement food in Sumatra. This includes food like vegetables including a variety of greens, fruits, honey and nuts.

It will also help Zoo staff adapt the orangutans food to ensure seasonal variety.



### ENVIRONMENT

\$125

All animals should have a comfortable environment to rest and shelter, and stimulation through the right temperature, substrate, space, air, odour, noise and predictability.

\$125 helps provide materials to construct a nesting basket so orangutans can nest off the ground and learn this vital skill. It will also include materials to provide shelter to the enclosure.

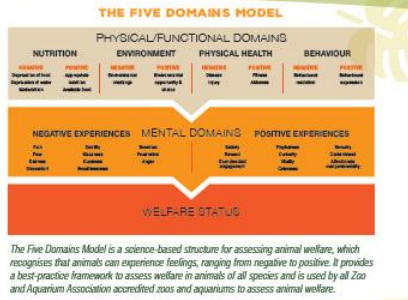


### HEALTH

\$185

Animals should be cared for so they are free of disease and injury and receive preventive care and treatment when needed.

\$185 provides a pre-release medical check-up for an orangutan graduating from Jungle School, or a quarterly health check at Perth Zoo.



### In The Wild

Opid was a small, 5-year-old male Sumatran Orangutan clinging to another orangutan and using him as a security blanket, when Holly first saw him on a trip to the Sumatran Orangutan Conservation Project's (SOCP) sanctuary.

He should have been learning how to live a life in the wild with his mother. Instead, his short life had already been full of fear.

Orangutans like Opid need intense rehabilitation and education at Jungle School in Sumatra for potentially years to be ready for release.

He wasn't raised by his mother and never learnt the vital skills he needs to survive in the wild. First, he needs to learn to be independent in the jungle. Then he needs to learn the basics like how to build a secure nest in the trees to spend the night.

Your gift today will help wildlife survive. Just like the young and orphaned orangutans who go to Jungle School to be taught the skills to survive independently in the wild.



### At Perth Zoo

Meanwhile the Perth Zoo team look after the eight resident orangutans in Jungle School right here at Perth Zoo.

This critical program in our own back yard is vital to the survival of this species.

It ensures a secure population of this threatened great ape is safe.

The team at Perth Zoo work tirelessly to ensure this precious species is preserved in the safest and most enriching environment we can provide.

Without the vital insurance population of this amazing species in safety at the zoo, we risk losing them forever.

Generous people like you can be part of saving wildlife species like these amazing apes too – because they can't save themselves!



Perth Zoo

Published by Lexie Brown · 1d ·

Orangutans need you!

Thousands of orangutans lose their lives each year due to habitat destruction. In the last two decades alone, orangutans have lost 80% of their natural habitat.

You can help wildlife, like amazing Sumatran Orangutans, have a chance of survival in the wild before it's too late. Their future is in your hands.

Don't wait. Please donate today! <https://bitly.ws/YTAm>



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You Can Help Save Orangutans Today!

Donate now

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# Resources - Takeaways



## CHECKLIST

Use to make sure you've collected everything for your Case for Support



## REGISTER

Use to start recording what you have collected for your Case for Support



## CASE TEMPLATE

To use as the basis for starting your own Case for Support



## STATEMENT TEMPLATE

To use as the basis to pull out information for your own Case Statement

[LINK TO RESOURCES](#)

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	A	B	C	D	E
1	<b>&lt;Organisation Name&gt;</b>				
2	<b>Case for Support Checklist</b>				
3	<b>Collecting Information</b>				
4					
5	<b>Case Section</b>	<b>Information</b>	<b>Sources</b>	<b>Where to find</b>	<b>Collected</b>
6	Mission	Mission Statement	Strategic Plan / Annual Report	Website / Printed Material / Digital Files	✓
7	Mission	Vision Statement	Strategic Plan / Annual Report	Website / Printed Material / Digital Files	
8	Mission	Purpose	Strategic Plan / Annual Report	Website / Printed Material / Digital Files	
9	Mission	Values	Strategic Plan / Annual Report	Website / Printed Material / Digital Files	
10					
11	Governance	How we are governed	Annual Report	Website / Onsite Files / In Person	
12	Governance	Board structure	Annual Report	Website / Onsite Files / In Person	
13	Governance	Board selection process	CEO / Board	In Person	
14	Governance	Committees	CEO / Board	In Person	
15	Governance	Bios	Research	Online / Onsite Files	
16					



## CHECKLIST

Use to make sure  
you've collected  
everything for your  
Case for Support



Leadership	Who is our CEO	LinkedIn / Articles / CEO	Online / In Person	
Leadership	Who is our Chair	LinkedIn / Articles / Chair	Online / In Person	
Leadership	Who are our Directors	LinkedIn / Articles / Board	Online / In Person	
Leadership	Who are our Managers	LinkedIn / Articles / Staff	Online / In Person	
Leadership	Bios	LinkedIn / Articles	Online / In Person	
Financials	Financial history	Past annual reports / Finance staff		
Financials	Current financials	Current annual reports / Finance staff		
Financials	Key project or department financials	Current annual reports / Finance staff		
History	How did we start	History website page / Books / Staff / Past staff		
History	What has happened so far	History website page / Books / Staff / Past staff		
Who	Staff Structure	Detailed Org Chart		
Who	Who are our staff	Key staff members		
Who	Who are our volunteers	Volunteers		
What	What do we do every day	About Us website page / Annual report / Staff		
What	What do we exist for	About Us website page / Annual report / Staff		
What	What programs service our cause	About Us website page / Annual report / Staff		
What	How do we serve our mission	About Us website page / Annual report / Staff		
What	Current priorities	Strategic Plan / Board / CEO / Staff		
Programs	What are our fundraising programs	Staff / Internal Files / Campaign & appeal examples		
Programs	How do we raise funds	Staff / Internal Files / Campaign & appeal examples		
Programs	How do we promote our need	Staff / Internal Files / Campaign & appeal examples		
Support	Who are our donors	Supporter Surveys / CRM / Reports / Donor profiles		
Support	Why do our donors support us	Supporter Surveys / Donor profiles		
Support	Donor statements	Donor profiles		
Support	What questions do our donors ask	Internal Files		
Supporting Documents	Annual Reports	Annual Reports	Website / Printed Material / Digital Files	
Supporting Documents	Strategic Plan	Strategic Plan	Website / Printed Material / Digital Files	
Supporting Documents	Board Reports	Board Reports	Onsite Files / Website	
Supporting Documents	Charters	Charters	Onsite Files / CEO / Board	
Supporting Documents	Policies	Policies	Onsite Files	

<Organisation Name>

## Getting your Case for Support Ready Checklist

### Step 1 - Collect Your Information

- Review the 'Collecting Info Checklist' worksheet
- Collect all the information you might need, and mark off the Checklist worksheet
- Set up a physical file and a digital file to store all your information you've gathered
- Record all documents you've saved in 'Template Case for Support Information Register'

### Step 2 - Draft your Case

- Create an outline and headings for your Case for Support
- Use the information you've collected to draft your Case sections
- Keep your copy donor centric
- Describe the impact of your service
- Use language that will be understood generally and that you want to use externally

	A	B	C	D	E	F	G	H
1	<Organisation Name>							
2	Case for Support Register							
3	Active Information							
4								
5	Section	File Name	Purpose	Source Document	Link	Document Type	Date of Latest Update	Responsibility
6	Mission							
7	Mission							
8	Mission							
9	Mission							
10	Mission							
11								
12	Governance							
13	Governance							
14	Governance							
15	Governance							
16								



## REGISTER

Use to start recording  
what you have  
collected for your  
Case for Support

## Template for Case for Support

This is a template for you to use as the basis for making a start on your own Case for Support. After you've used the Case for Support Checklist to start collecting all the information you will need, you can then start working on your own Case.

This is an internal document for you to collect all the information you'll need to prepare information for your Case Statements and other fundraising collateral.

Change the headings and structure to suit your needs. As long as you have all the base information, this is your document so make it work for you.



### CASE TEMPLATE

To use as the basis  
for starting your own  
Case for Support

### Your Fundraising Programs

- What are your current fundraising programs?
- How do philanthropic funds come to you?
  - What kind of appeals, events are you running?
- What are all the ways you collect philanthropic funds?
- How do you promote your fundraising programs?

### Your Supporters and Donors

- Who are your donors?
- Where do your donors come from?
- What do you ask your donors for?
- Why do they support you?
- Add relevant donor statements.
- What questions do your donors ask you?

### History

- How did your organisation start?
- How far have you come.
- How have you fulfilled your mission and made an impact?
- How have you changed things for the better?

### Who Are Your People

- How is your organisation structured?
- Who are your key staff members?
- Who are your volunteers?
- What are the contact details of your key staff?

### What Do You Do

- Why do you exist?
- Why do donors deserve your support?
- What do you do every day – what are your programs?
- How do your programs or services fulfil your mission?
- What are your current priorities?
- What are your long-term priorities?
- What is the urgent need that you are addressing?
- Why are you the right organisation to meet this need?
- Add compelling and emotional stories of impact:
  - Include small overviews.
  - These stories can be used as appropriate in your fundraising information coming from your filed information.
  - Include or refer to appropriate statistics.
- How are you heading on your journey to fulfil your mission?
- What will happen if you do fulfil your mission?
- What will happen if you don't fulfil your mission?

### Mission

- What is your mission and/or vision?
- Why do you exist?
- What is your cause? For example do you want to end hunger, do you want to make sure there are no drownings, ending a disease, do you want to ensure the survival of wildlife etc.
- What will change in the world if you accomplish your mission?

### Governance

- What kind of structure do you operate under?
- Do you have a Board, or Trustees, or Directors?
- How are your board members selected?
- Do you have committees under the board?

### Leadership

- Who are your leaders?
- Include relevant information about your:
  - Chair.
  - Directors.
  - CEO.
  - Managers.

### Financials

- Highlight your financial position.
- What are you doing with your funds.
- How do you use your money?
- Show your trust with the impact you have made with past funds.
- Add in your current and future projected financial state.
- Include any relevant graphs or charts.

## Template for Case Statement

Once you've completed your Case for Support, use this template as the basis for making your own Case Statement.

Target it to a specific program, campaign, or donor.

You can use it as an internal document to help prepare further collateral for a specific program or use it as a stand-alone proposal.



### STATEMENT TEMPLATE

To use as the basis to  
pull out information  
for your own Case  
Statement

### What is the Situation/Problem?

- What are you raising funds for?
- What is the actual problem you are addressing?
- Why is this situation/problem so important to fulfilling your mission?
- Why does this situation/problem need to be addressed now?
- Include an emotional and compelling story of why this issue needs solving, what will be better.
- Include any evidence such as statistics, facts and figures.

### Why Should We Fix this Situation/Problem?

- How will your organisation address the problem?
- What are the steps you will take along the way?
- Have you done this sort of thing before?
- Why should you do this now?
- What in your history supports your credentials for fixing this problem?
- How have you fulfilled your mission and used resources responsibly to make a positive impact on your community previously?
- How does your mission/vision align with this problem?
- Does your strategic plan support this project?

### What is the Plan?

- Why is your organisation best placed to address this?
- How does your history support this?
- Demonstrate future financial viability

### What is the Planned Result?

- What will happen if the plan is successful?
- What will be achieved?
- How will the outcome solve the issue?
- How will the outcome be measured?
- Include stories that support your project need.

### How Can Donors Help?

- What are you asking the donor for?
- What is the specific request/ask?
- How much do you need the donor to support?
- Is there any recognition for the donor?
- What are all the ways donors can support this project?
- What is the impact the donor will have?

# Your turn...

## 1. Collect information

Use the Checklist Template to help you collect all the information you'll need for your own Case for Support.

## 2. Save physical and digital files

Use the Register Template to keep track of your information and then save the collateral you've collected.

## 3. Write your Case for Support

Use the Case for Support Template to start your Case but make any changes you need to make it your own.

## 4. Collaborate extensively

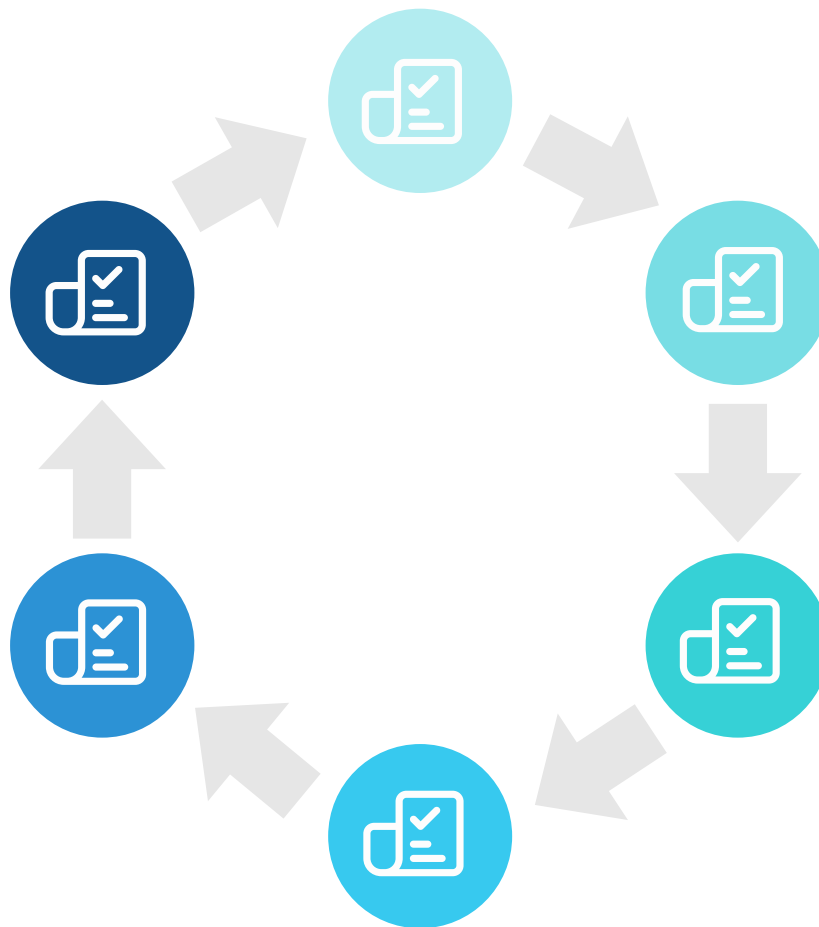
Talk to all relevant stakeholders to make sure you're on the right track and you have everyone's buy in.

## 5. Use your Case for Support

Use the Case Statement Template to use your Case for Support to prepare for campaigns and other projects.

## 6. Review your Case for Support

Review your Case whenever there is a change to your organization or your programs. But at least once a year.



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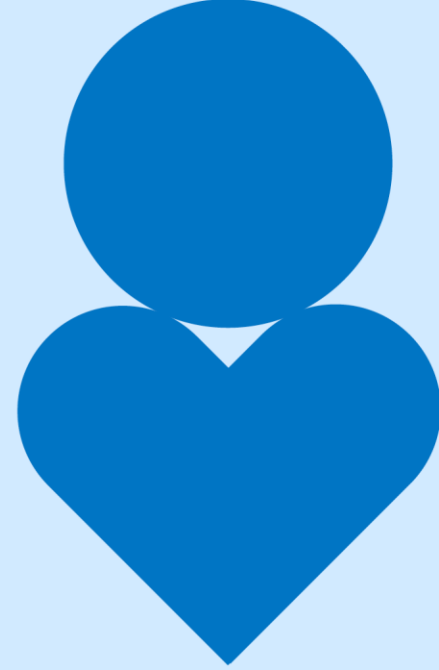


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