

## **GLOBAL CONNECTIONS, IT'S ONLY MONEY! CONFERENCE** September 2005

### **WORKING WITH TRUSTS AND FOUNDATIONS (1C.2)**

#### **Developing a Case for Support** Pat Finlow, Oasis Charitable Trust

##### **Why have a Case for Support?**

People working closely on a project usually develop an instinctive understanding about the work they are planning or doing. It is therefore very difficult for them to take a step back and write about the project in a way that is clear and unambiguous for a potential funder.

It has become considered good practice in any fundraising campaign, for the project/organisation to develop a written case for support.

##### **What is Case for Support?**

A case for support draws together all relevant information about a project in one place and in written form. It helps to ensure that all thinking and planning about the project is made explicit, it limits inaccuracies and minimises misunderstandings both internally and externally about the work. It both summarises the need for the project and its aims and objectives. It should also ensure that any achievements already made, experiences gained and lessons learned are noted.

##### **Who should draft a Case for Support?**

While the raw information will need to be supplied by the project itself, it is usually advantageous for someone other than those directly involved to draft a CFS. This enables objectivity and allows for a fresh pair of eyes to review the material and identify areas that require further explanation. Those working closely on a project are often not aware of the assumptions they make, nor do they realise the specialist knowledge they have about the work may not be held by the funders.

##### **What are the elements of a Case for Support?**

While some of these questions may appear to overlap, often answering each question separately draws out different aspects of the work.

1. Clear statement /description of the need/problem/situation of concern
  - Include any research that either identified or supports the problem as understood by the project
  - Describe the need in both statistical as well as human interest terms if at all possible
  - Don't assume any prior knowledge of the issue
2. Description of how 'the world' would look like if the problem were solved
3. Description of what action needs to be taken to bring about solution described in 2.

4. Description of what specific activities the organisation/project will do (and when) to bring about 3
  - Including time frames for work (e.g. 2 sessions run per week between Sept and April)
  - any plans for expansion or future phases of project
  - any partnerships with other organisations
  - Where the work will take place
5. Establish the project's credibility
  - Qualifications and experience of project staff
  - Past achievements of project/organisation in this or related area
  - Experienced gained/lessons learned in any earlier phases of project
  - Any funding already gained/assured
  - Endorsements gained from relevant parties
6. Description /estimate of impact of work, including any measurable outcomes  
eg: number of beneficiaries helped
7. Comprehensive list of resources needed to achieve project objectives (as at point 4).  
Resources will include people, materials, etc
8. Establish full costs for the resources at 7 and translate these into a budget.

#### **Once drafted, how should the Case for Support be used?**

Ensure that those involved in managing and running the project 'sign off' on the case for support. This will ensure that you have minimised misunderstandings.

The document should be used as a central reference document for anyone involved in researching potential funders, as well as in drafting funding applications and follow-up material.

It will help to identify one aspect of the project for the potential donor to give to – matching their particular interest to the work of the project. Identify something either from the activities being run (eg each session cost £250) or linked to beneficiaries (it costs £15 to treat each person).

It will help provide a clear statement about how 'their' bit makes a difference (one young person will have the skills to apply for a job to support him/herself and family...)

It will also minimise the need to continually refer back to the project should questions arise from a potential fund.