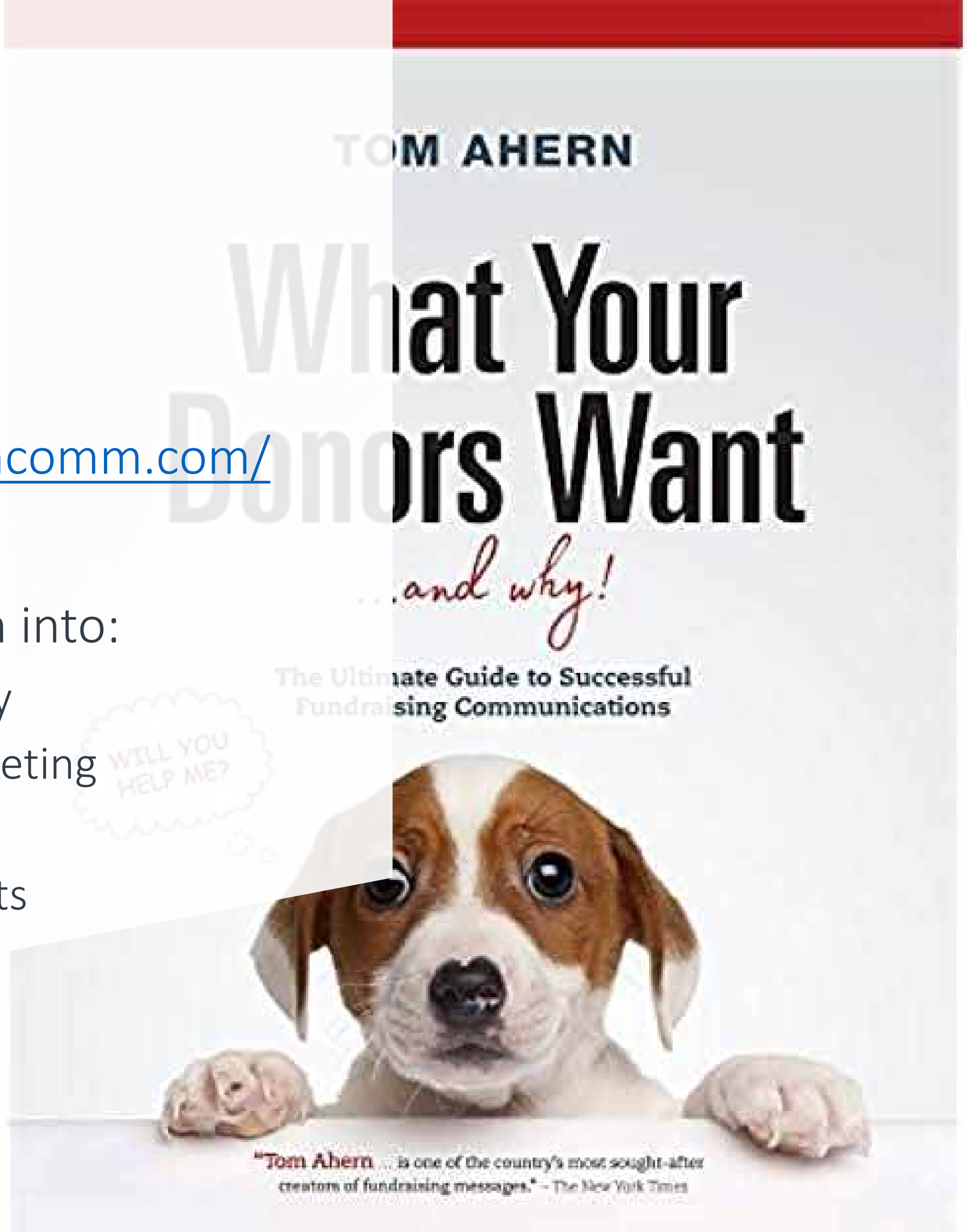
CASE WRITING REFRESHER

CREDIT

- Tom Ahern https://www.aherncomm.com/
- Backed by research into:
  - Donor psychology
  - Advertising/marketing
  - Human behavior
  - Fundraising results



What a Case Is and Isn't

What it IS:

- A marketing piece for a potential donor with a clear and purposeful intent to:
  - Help potential donors see us as a vehicle in which to accomplish their mission
  - Inspire a potential donor to take a next step
  - Weed out the "yes, maybe's" from the "no's"
- A supportive, helpful tool in relationship-based fundraising
- Donor-centric, meaning we write about and for the donor.

What it ISN'T:

- An academic paper
- A grant application
- A program/initiative description or overview
- An internal document (not for our faculty)
- A promotional piece for UW Medicine or a program or initiative
- Corporate communications (not about showcasing how great we are)
- A replacement for long-term relationship building

10 Tips for Writing Cases that Work

#1: Start With the Donor and Work Backward

- Think about your donors and the goal (moving a prospect closer to a gift) BEFORE you start writing.
  - What do they want, need, feel?
  - What motivates them?
  - What do they need to hear to take the next step?
  - What are they trying to accomplish with their philanthropy and how might we help them achieve it?
- Show them how they can achieve THEIR mission through us.

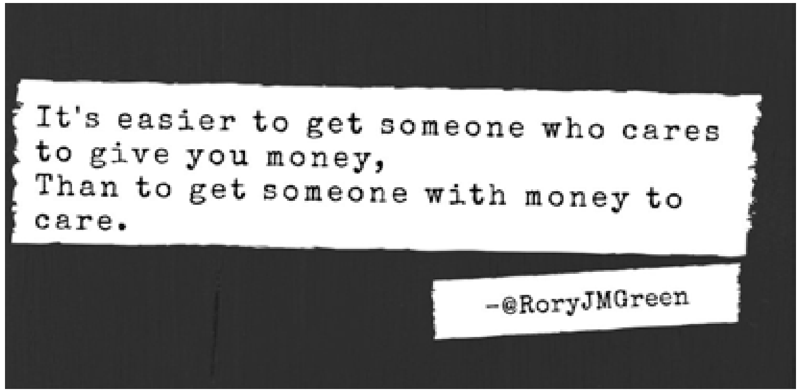
Donor personas coming soon!

#2: Lead with Your Offer

- Lead with the offer/opportunity (the key motivator for giving isn't need; it's the opportunity to make a difference)
- Donors make a decision between "no" and "maybe" in the first 30 seconds
- So…make sure that the donors know what this is about in the first 30 seconds of your case (about the first 100 words – so use your headline!)
- Follow your ask with calls to action repeatedly throughout the case

#3: Answer the 3 Essential Questions

1. Why us?
   - What are we doing that's so uniquely wonderful that the world should want more of it and support our plans?
   - Imagine that your project, program, idea, mission or vision disappeared tonight. What will outsiders regret losing?
2. Why now?
   - What's the big hurry? What changed? Why is this URGENT?
3. Why you (the donor)?
   - Where do our program and the things they care about intersect?
   - Emphasize shared beliefs, values, missions
   - Connection! Make it about them; keep it emotional and personal



#4: Give the Donor a Big Job to Do

- Define the big, bold vision (ending cancer, blindness, heart disease, etc.)
- Explain how your program will help accomplish that big, bold vision
- Make the donor the hero who can help get the issue from Point A (current state) to Point B (big, bold vision) by funding your program
- Give the donor a mission or purpose.

#5: Focus on Impact

- Keep the focus on what will happen when the work is done (IMPACT) – not on what we do or how we do it.
- Save the detailed information on what we do or how we do it for the appendix, site visits/tours, meetings with faculty, etc.

#6: Make an Emotional Connection

- Connect the issue to real people
- Use words and images that "make your heart beat just a little bit faster"

  (professor Jen Shang's first-encounter test)
- Be careful with stats – they can suppress emotion and aren't effective motivators for giving

> "People give to people, not to organizations, mission statements or strategies."
>
> – Harold Sumption (Oxfam)

#7: Speak Directly to Your Donors

- Use the "you" pronoun, a lot
- Remember, this is marketing NOT corporate communications
- Should feel personal, warm, connected, conversational

#8: Reflect Their Best Selves

- Reflect the donor's ideal self
  - How do they want to be seen and how can giving to our cause help them become that person?
  - Research shows flattery (even when insincere!) leaves a lasting, positive impression

- Some qualities to recognize and honor:

  courage – faith – trust – concern – loyalty –

  dedication – sense of justice – vision – resolve –

  integrity – kindness – steadfastness – understanding

  – compassion

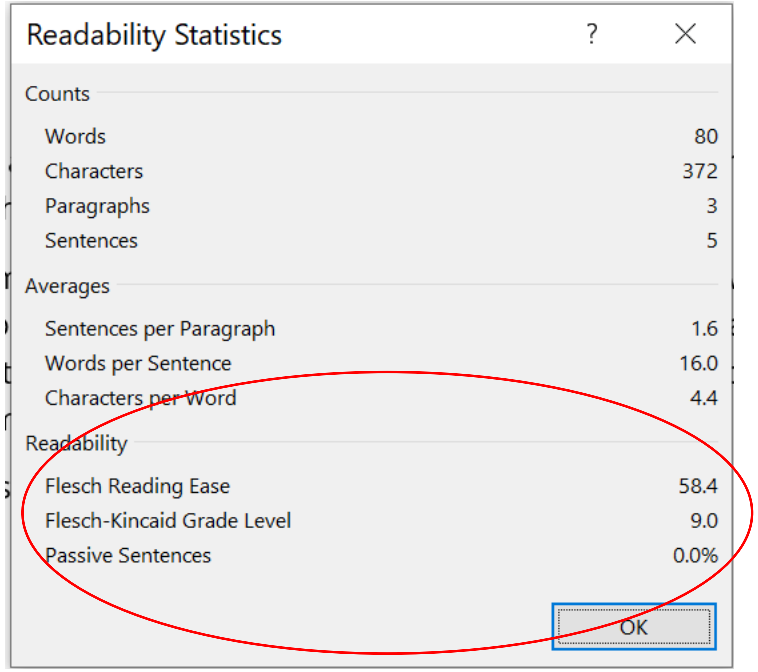
#9: Use Mental Nods

Use words, phrases and images that connect with your donor:

- Statements they will agree with
- Acknowledgement of their personal experience with the issue
- Statements that validate their images of themselves as a good person, a community leader, a savvy investor, a change-maker, etc.

#10: Avoid the Curse of Knowledge

- Remove the jargon. Be human. Write like you talk.
- Remember: Your audience isn't your faculty.
- Don't turn a case into a homework assignment for donors!
  - Only include the MOST important and compelling information
  - Check readability statistics and keep the writing at a 9th grade reading level or lower; or a 55 reading ease or higher


Readability Statistics

Counts	
Words	80
Characters	372
Paragraphs	3
Sentences	5
Averages	
Sentences per Paragraph	1.6
Words per Sentence	16.0
Characters per Word	4.4
Readability	
Flesch Reading Ease	58.4
Flesch-Kincaid Grade Level	9.0
Passive Sentences	0.0%

OK

This isn't about patronizing donors or "dumbing down" content. It is about respecting our donors' time and their intelligence and ensuring our cases have the emotional resonance that will get donors to take the next step.

10 Tips for Effective Case Writing

1. Start With the Donor and Work Backward
2. Lead With Your Offer
3. Answer the 3 Essential Questions (Why us? Why now? Why you?)
4. Give the Donor a Big Job to Do
5. Focus on Impact
6. Make an Emotional Connection
7. Speak Directly to Your Donors
8. Reflect their Best Selves
9. Use Mental Nods
10. Avoid the Curse of Knowledge

Case Format

1. HEADING & THE BIG BOLD VISION (i.e. “The end of – insert disease – ”)
   - Define the enemy (disease, health inequities, etc.).
   - Convey the impact of the issue on real people (instead of stats, think emotional stories).
   - Consider adding a call-out sidebar with a story that can be told in a couple sentences or a quote.
   - Set the big, bold vision (i.e., end of a disease) and ask for a commitment right away – invite the donor to help us achieve that vision.
2. UW MEDICINE / WHY US?
   - What are we doing that’s so uniquely wonderful ? (Need help? Pretend the project, program, idea disappeared tonight. What will the world lose?)
3. THE URGENCY / WHY NOW?
   - What’s the big hurry? What changed? Why is this URGENT?
4. AN URGENT PHILANTHROPIC OPPORTUNITY / WHY YOU?
   - Explain the opportunity:
   - Give the donor a big job to do: We’re at point A, we need them to get to Point B (our big, bold vision)
   - Give them a purpose: What is at stake for people in our community if they don’t give?
   - Frame specific giving opportunities within the context of the big, bold vision (how will each investment get us closer to Point B)
5. JOIN US IN THIS BIG BOLD VISION (i.e., “Help us end cancer”)
   - Call to action: How they are needed to reach our big bold vision.
   - Include contact person, email and phone.
   - Thank them for their consideration of the opportunity and for being an amazing human (i.e., for their “resolve,” “leadership,” “commitment to improving lives,” etc.)

Q&A

1. **Should I be worried about donor-centric language giving donors too much power?**
   Probably not. The goal of the case is to pique the interest of qualified prospects – to help them see how they could achieve their goals through their philanthropic support of our work. But you and your faculty ultimately establish appropriate boundaries and the rules of engagement.

2. **Being a "partner" is really important to my donors. Can I use that word?**
   Sure, "partner" could be an effective mental nod for your donors. It's always a good idea to use words and phrases that will motivate your donors. We will work with you to incorporate your knowledge of your donors with best practices in fundraising copy writing.

3. **My donors like scientific facts and want to know all the details.**
   Great! Include the details in an appendix. They don't belong in the case itself as scientific data and facts reduce emotional connection and undermine the effectiveness of the case.

4. **How much should I write this myself vs. having the communications team write it?**
   That depends on your comfort level with copy writing. If your comfort level is high, go ahead and write a first draft that we can then edit. If your comfort level is low, please collect all the information for each section of the case (in bullets is fine) and send it to your communications team liaison.

Q&A

5. **My faculty doesn't like the case and has a lot of edits. What should I do?**
   This is likely to happen, but we may be able to reduce the frequency by explaining the following to faculty BEFORE we write a case: 1) what a case is and isn't (slide 4 in this deck), and; 2) roles of each party (FLF- first draft/coordination; faculty- provide info and fact checking; comms- copy writing, editing, design). If a faculty member has significant concerns after a case is written:
   - Consider their feedback objectively and evaluate what makes sense to change and what doesn't.
   - Ensure your faculty member understands the purpose of the case.
   - Include additional information that doesn't fit in the case in an appendix.
6. **What questions should I send faculty?**
   Ask your faculty the three essential questions (slide 9 in this deck) and to define the big bold vision. Also ask where we are now in relation to that vision and how the funding requests will help us get there. Eleanor has a recommend list of questions.
7. **We've been very successful. Why change cases now?**
   Because we can be even more successful. Let's make sure the time and energy that you, our faculty and the communications team invest in a case is time well spent.