Preparing your Case for Support – a brief guide

**What is a Case for Support and why do we need one?**

The Case for Support is a compelling document (normally of about 6 pages plus any appendices) that explains why your charity/CIC/group deserves to be funded. It will form the basis of funding applications and as such needs to be both factual and persuasive!

The idea is to create a document that answers most of the questions you may be asked by a potential funder. The process is often useful in itself as it will prompt thought and discussion about important issues, and is a great opportunity to clarify your objectives, priorities and forward plans. It also tends to reveal the weaknesses in your Case, or how it can be improved (e.g. are you able to evidence the need for your work? The impact it has on your beneficiaries?)

Once you have a Case for Support in place, you should be able to cut and paste or -more usually - adapt sections from it for funding applications, saving time and effort. You may find that each time you do so you will refine and improve the way you explain and describe your work, and can update the Case for Support as you go along. In this way it’s very much a living document that changes and grows with your organisation.

**What needs to be in it?**

You may find the following headings (and the notes in brackets) useful as a guide to drafting your Case. You don’t have to put them in this order but do make sure that there is a logical flow from start to finish and that the end result is coherent.

1. **The organisation** (full name and legal form, background – where, when and why you were established - your mission or aim, key objectives, key achievements – all very briefly!)
2. **The need for your work** (what are the issues you are aiming to address? What evidence do you have that this need exists? You may wish to include anecdotal evidence such as your experience of working with or consulting the beneficiary group, and where possible, ‘hard’ evidence such as stats or research).
3. **Beneficiaries** (who are they? Age/gender/ethnicity? What problems/issues do they face?)
4. **Activities** (what do you do to achieve your aims? Describe your services or projects. When and where do they happen?)
5. **Outcomes** (what changes do you expect to occur in the lives of your beneficiaries as a result of the services/activities you provide? These are sometimes expressed as 4/5 bullet point statements of what success would look like e.g. ‘older people will be less isolated, with improved health and wellbeing’. Remember you may at some point need to measure these so make them achievable).
6. **Impact** (what benefits or changes have these activities resulted in for your beneficiaries to date? How do you know this? Use numbers, case study examples, quotes, the results of any evaluations you have done).
7. **Achievements** (what has your organisation done or achieved that you are proud of? Could be over a short period such as a year, or longer – e.g. ‘since the charity was established we have….’ This section demonstrates your track record. Bullet points work well).
8. **Future plans** (Over the next xxx we plan to…could be a mix of quantitative and qualitative information e.g. engage xx young people, launch xx new projects, grow the organisation, achieve charitable status…).
9. **Governance, management and staffing** (How is your organisation governed? If you have Trustees or a Committee, how many are there? How often do they meet? What skills do they bring? How many staff do you have? How is the team structured? How many volunteers? If you need to confirm safeguarding arrangements such as DBS checks you can do so here).
10. **Links and partnerships** (Who else do you work with to achieve the desired outcomes for your beneficiaries? How do you work with them/what’s their role in your work? You could include statutory organisations such as Social Services or Frome Town Council here as well as other local organisations).
11. **Costs and funding** (Use this section to summarise your financial position and then to outline your funding need. You could begin by stating the position at the end of the last financial year – total income, expenditure, and any surplus or deficit. State the level of any reserves you hold. How much do you need to operate over the next year, and how much of that have you secured? From which sources? How much do you still need to raise and for what? What is your strategy/plan for raising that money – e.g. have you applied to anyone else and/or are you waiting for a decision?)

**Useful appendices**

The following are useful to have as appendices, again to use when you want or need to.

**A budget** – this is essential, not least because many funders will ask for it. You should have a budget for the current financial year (and possibly the next, depending on which stage of the year it is) showing income (both secured and anticipated) and expenditure (anticipated). Don’t worry too much if it shows a shortfall – this just shows that you need more money! It’s a good idea to have a budget for the organisation as a whole, with ‘summary’ headings. You may also have budgets for different projects within your overall financial plan.

**Case studies** – 4/5 lines max in order to take up the least space in an application. Don’t use real names (or just an initial) and make sure you include the reason(s) the person needed help and how your organisation helped them.

**Quotes** – from beneficiaries (and/or their families) about their experience of your organisation. Often you will have these, perhaps in an email or a letter, but it’s fine to ask people too. Most people will be glad to help.

**Quotes** – from local partners about their experience of working with you.

**Photographs** – are also useful if your work lends itself to them. Often you won’t have the opportunity to use them (for an example if the application is online or via a form) however in a ‘freestyle’ application they can really help to bring your Case to life.

**Finally….**

Don’t be daunted by any of the above! The Case for Support doesn’t have to be War and Peace – in fact most of the sections should be covered in just a few paragraphs. The trick is to make what you say count. No one knows your charity/organisation or your work better than you, so write with passion and conviction, and remember that a good Case is always a work in progress.

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