

As a result of our Money Talks survey in late 2017, we identified that there were a [range of issues at play](#) when it comes to artists and finances. Some are more systemic (eg the relationship between [artists and venues](#)) and others are knowledge or skills based. In an attempt to help with the latter, Theatre Bristol has commissioned these new help sheets (Dec 2018), written by Emily Williams and Carrie Rhys-Davies, on four hot topics:



- ways to calculate how much your work costs
- understanding financial deals
- understanding fundraising options
- building a case for support

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Building a Case for Support

A helpsheet for artists by Carrie Rhys-Davies

This helpsheet is divided into two sections: the first is about the whys and wherefores of a Case for Support, and the second suggests a five-part framework to help you build your own Case for Support, along with prompts and tips to get you thinking. It's based on my own experience of making Cases for Support when developing funding applications as a producer and in collaboration with fundraisers, and also draws on lots of wisdom that's out there in the arts fundraising community, referenced throughout with hyperlinks and also available in the resources section at the end of this helpsheet. I hope that this might help make the task of sitting down to create your Case for Support feel not only eminently manageable, but also satisfying in its own right, resulting in a unique, inspiring and persuasive document that you can stand behind with pleasure and pride.

(A note on language: the words donor/funder/investor and funding/support/investment are used interchangeably.)

SECTION 1: About Cases for Support

What is a Case for Support and why might I need one?

A Case for Support (C4S) is the foundation of any approach to a potential investor. Effective fundraising is all about building and maintaining relationships, and what you're doing with a Case for Support is reaching out your hand to a funder, not so much to see if they put any money in it, but rather to see if they take hold of it. Different funders have a multitude of different needs when it comes to approaches, but whether a Case for Support is all that's required, or the starting point for a more involved application process, in [the words of Joanna Ridout](#), it should be a "powerful primer, offering an inspiring picture that illustrates [your work's] unique character, power, its instrumental impact as well as its intrinsic qualities."

Things a strong Case for Support does

It makes a *well-evidenced argument* for why you deserve funds

It invites investors go on a *creative journey* with you

It draws the reader in, telling your *unique story* in the way only you can

It articulates the *value* of what you do and how you do it

It makes donors *care* about you

It lays the foundations for *meaningful investment* and a *sustainable relationship* with a funder

It uses the ART

Tip: [As Ridout writes elsewhere](#) - you might find it helpful to think about how you build relationships and partnerships throughout your work – what does it take to develop those meaningful connections with your collaborators, audiences, communities, etc.? What do you value about the way you relate to each other and how might that inform how you approach your fundraising activities?

When should I build my Case for Support?

In an ideal world, you'll have the vast majority of your C4S solidly in place *before* you start researching potential funders. This way, it should be straightforward to cross refer what you're about with what potential funders are interested in supporting and therefore spot matches fairly easily. The danger in not having your C4S up and running before you start identifying tempting-looking pots of money is that you find yourself formulating your company's raison d'être especially to fit with what a particular funder is looking for – which obviously isn't good either for you or them in the long-term.

The good news is that once you've built your C4S, it's a kind of home for life, as it were: you won't have to build another one any time soon. Like any building, however, it will require ongoing maintenance and improvements to ensure that it's still inhabitable and working for you. In short: a Case for Support needs to be a living document – one that grows and shifts as you and your work grow and shift – so that it's always a true reflection of what you're about, where you're at, where you're going, how you're going to get there – and, fundamentally, *why* you're worth supporting.

Tip: *Have a think about where on your laptop or PC you might want to save your C4S. On an external hard-drive? What might it be to have a link to it on your desktop? Or pinned to your taskbar? How might your relationship with it change if you printed it out and [stuck it on the wall in front of you](#)...?*

How long should my Case for Support be?

A Case for Support should be concise, clear and specific, and it should be possible to make a compelling argument on 1 side of A4 – 2 at the most. Remember – it needs to be both an *external* and *internal* document: standalone and useable in its own right *and* your go-to starter-document for a more elaborate application.

Tip: *If you're visually minded, then you might find it helpful to colour code your basic C4S, for example highlighting sections that you can either expand on or scale back, depending on what sort of donor you're approaching. For example, you might have one colour for bits that can be elaborated on if you're approaching a funder with an explicit interest in supporting work with young people, and another colour for bits that can be expanded on if you're approaching a funder who supports work in a particular geographic area.*

What do I need to build a Case for Support?

Raw material

The good news is that most of what you need to build your Case for Support probably already exists in one form or another. Before you start, you might find it helpful to spend a few minutes gathering together information about you and your work, perhaps even reading through it so it's fresh in your mind. The sort of things that might be useful are: memorandum of association and articles of association (if you're a company), annual reports, business plans, evaluations from recent projects, reports, reviews,

audience and participant feedback, collaborators' testimonials, box office analysis, your favourite images or footage.

Other people

The ideal Case for Support is one that everyone in a company or organisation can stand behind (and communicate externally) as an expression of organisational identity. And so it makes sense that they are all involved in building it. If you're an individual artist, it might be that you and you alone are the best and only person who can write it. But it might be that you have colleagues, collaborators, advisors, or even a board of trustees, who could all be part of the process. How might building and maintaining the C4S be something your whole team can be involved in?

Tip: Building your C4S might highlight some gaps in the information you have about what you do, your understanding of the impact it's having or the context in which you're working, for example. Consider this an opportunity to reflect on how you might be able to build capturing this sort of information into how you manage and make your work.

Where can I find examples of good Cases for Support?

Unfortunately, there aren't many out there in webland. One exception is [the living Case for Support for touring theatre](#) that Twine has set up online, which encourages contributions from industry professionals, academics and audience members. Whilst not extensive, it's worth checking out if you're in that field, and even if you're not you may find it a helpful reference point. And whilst it's understandable that a lot of people might be reluctant to share the likes of funding applications, it's always, always worth asking.

Tip: Before you start, and perhaps especially if you're a solo or independent artist, you might find it helpful to have a think about whom you can test your C4S out on, so you can see how it's working. You could also consider approaching one or two other artists to see if they might be interested in building their C4S alongside you, so you have peer support through the process.

SECTION 2: How to build a Case for Support

Below is a suggested framework for how to build your C4S. There are five sections and you might find it helpful to work through them in order, or you might find that it works well for you to weave between them as you research and build your own C4S. The names I've given the sections are those that I've felt are most helpful for this helpsheet, but you should have a think about what sort of section titles (if any) might be of most use to you. Basically – use the framework however feels most helpful, and if you discover ways in or techniques that you think others might benefit from, please do share them with the TB community. This too is a living document!

1. The Big Picture

Any individual or organisation looking for investment first and foremost needs to be really clear and articulate about its purpose and mission. If you don't know or are a bit vague on what you're about, then you can't expect a potential funder to be any clearer. So the first part of your C4S needs to paint the big picture and answer the big questions: Who are you? What do you do and why? This is an opportunity to inspire potential funders with your/your company's story. It's also an invitation to donors to come with you on your journey, so tell them - where have you been, where are you now, and, most importantly, where are you going? What is your vision for your work?

Your artistic identity should come through loud and clear in the section, so have a think about what it is that make you/your company unique and how you might use the art to illustrate this.

A note about language: I've read lots of draft funding applications and had the sense that their author is sometimes using language they feel they 'should' be using – a kind of 'fundraising speak' that mutes or – worse - conceals what makes them, them. [As Tanuja Amarasuriya says](#), there is no right or wrong language for talking about your work (although, as with everything, jargon should be avoided...); there's just the language you feel best expresses and represents it.

This section is also good place to include brief details of any nominations, awards or accolades you have received.

Tip: [Tanuja's Articulating Your Practice worksheet](#) created for Theatre Bristol includes lots of REALLY helpful exercises to get you communicating clearly about you and your work, including ways of testing stuff out to find out what other people are actually understanding from the words you're using.

2. Focusing In

This is the place to describe what you need the money for. What are your aims for your current project/activity, and what are you *actually going to do* in order to achieve them? This section should give sufficient relevant detail to enable the reader to imagine your project in action. Try to answer all the What, Where, When and Who questions and be as specific as you can. This is also the place to answer the How many? questions. Some of these you might know the answers to (for instance, you're going to work with three primary schools and run five workshops in each); some might be targets (you're going to present a show in a community centre, aiming to reach 150 people from the surrounding villages). Your description of your activity should give a clear sense of the scale and reach of what you're planning.

[A note about knowns and unknowns](#): often you'll be writing a Case for Support for a project that's at a very early stage of development. In these circumstances, you might find it helpful to a) think about what you actually DO know about what you're doing, and b) be really clear about what you DON'T yet know. You might also find it helpful to think of NOT knowing something as an opportunity to craft a really neat question (or questions) that you want to try to answer through carrying out your work.

Tip: Check out [Simon Day's Unofficial Guide to Applying to the Arts Council](#) for some great advice on how to develop project aims that are really true to you and your work and also really useful. And remember to check back: do your aims for your current project/activity clearly feed into your mission and long-term vision as articulated in section 1? If not, look again, as this is an important part of creating a sense of your journey.

3. Backing it up

If your Case for Support is going to be convincing, it will need some compelling evidence to back it up. This is where you get to prove unequivocally that you're a good bet – that the funder's money will be well spent because you've got a track record and can deliver. It's time for statistics and quotes! Try to get a balanced mix of both quantitative data (e.g. how many people have attended your workshops, how many venues you've toured to, etc.) and qualitative data, which evidences the impact your work has had - this is where all those testimonials you've diligently sought from collaborators and participants and feedback you've gathered from audiences, other artists, partners, funders, commissioners, venues, etc., plus any press coverage, really come into their own.

Tip: *All your evidence should be easy-to-understand and meaningfully contribute to your argument. If you're having trouble choosing which statistics and quotes to use, check them against the purpose and aims you've written for parts one and two. Ranking them according to relevance might help you identify a spread of data from a range of sources that's really specific to what you're about.*

4. Why they should care

This is the place to really nail what the *need* for your work is. Why does your vision matter? What are the benefits for the people you serve? What would be the gap if you didn't do what you do? More than anything, funders will be looking to see that there are values you have in common and that you're looking to have the same kind of impact as them. So tell them how your work can help them meet their needs.

A note on researching investors: There's usually plenty of information about funders online (their own websites, guidelines, annual reports, charity commission website entries and funding records), but [don't be afraid to pick up the phone](#) to find out how you can best give them the information they need in a way that makes sense to them. Fundraising is all about relationships, after all, so what better place to start than a conversation?

This can also be a good place to include some key contextual info - additional details that help 'make it real' for the reader: where do you and your work fit in, how and why? Perhaps some key demographics about the communities you're working with might clinch a point; maybe information about a local population's wealth or employment status might support your case; or perhaps some key statistics about health or education in the areas you reach might help highlight the need for what you're doing.

Tip: *Remember that there's going to be a real-life human being reading your C4S, so [don't underestimate the power of an emotional connection](#) with what you do. When you're testing out your draft C4S on other people, you might find it helpful to ask what it's making them feel. If you're struggling with this, try asking yourself what tends to make you form an emotional connection with things that you read and borrow from that.*

5. Making the Ask

Ask for the money! How much is it going to cost to realise your vision, to deliver the activity you describe? If you're a larger operation, you might want to include info about much your organisation costs to run. Where's investment most needed and why? Most funders won't be looking for a quick win; they'll want an idea of what sort of impact their money will have over time. So, how does investment from them at this point enable you to get to where you want to go next, and how does that chime with their agenda?

And make sure you do *actually* ask for the money! You'd be surprised at how often this is left implicit, and as such a little unclear.

Tip: *Now's a good time to work through what you've written and see how donor-focused it is. Think about how a funder might respond differently to reading ["Your donation will help us do xxx"](#) and ["Your donation will do xxx"](#).*

Some thank yous, and resources and links you might find helpful:

This help sheet draws on the wise words of those who've gone before, in particular thanks to:

- Tanuja Amarasuriya, whose [Articulating Your Practice](#) helpsheet is super helpful and super practical on all things 'talking about your work'
- Simon Day, whose [Applying to the Arts Council: An Unofficial Guide](#) is still a really valuable as primer on applying for funding, even though Grants for Arts no longer exist
- Laura Greenfield, for [her training video](#) on creating a case for support
- Joanna Ridout, who has written some excellent pieces for Arts Professional about arts fundraising, including on [Building a Stronger Case for Support](#) and [Getting More from Trusts and Foundations](#)
- Wonderbird, for [this short piece](#) on telling your story and getting your case heard

Also:

The ACE-funded [Arts Fundraising & Philanthropy Programme](#) is dedicated to upskilling the sector and has a wealth of really valuable information available through its [Ideas & Knowledge](#) section. Particularly useful is [Culture Hive](#), where you can search by key words for articles, reports, case studies, guidelines and more on virtually any aspect of fundraising, including [this article](#), which looks at using the 'causes' model of storytelling to create a Case for Support – a great alternative perspective. If you're in the small-scale touring theatre game, you may find [the living Case for Support created by Twine](#) helpful. And if you want to teach yourself more about fundraising, check out the courses available through the [Arts Fundraising & Philanthropy Programme](#) and [Cause4Advance](#).