Chapter Four: Telling Your Story Case and Impact Statements or “…So A Kid Walks Into a Health Rocks Program and…”

In This Chapter

- Making the case for annual giving
- The role of impact statement—what they are, how to use them
- Telling your story throughout the year: appeals, website, at events
- Materials to develop—options for ways to do this

Steps included:

Step 1—Develop Your Overall Case for Support
Step 2—Create Your Impact Statements
Step 3—Test Your Impact Statements
Step 4—Tell Your Story Many Ways
Step 5—Create Materials
Overview

Building the case for your annual giving program works like building a strong case for anything else you do. But because we often are “selling” the wrong things in a building campaign or endowment effort, we come to the process of imagining the Annual Giving case with misconceptions. Often, building campaigns or endowment efforts will focus on the naming opportunities available, the spaces to be built or renovated, the opportunity to increase cash flow or provide new positions to the program. While these are all wonderful outcomes of a campaign, and may feel really exciting to us “on the inside” of an organization, they are not an inspiring reason to give because none of these focus on the change that will happen in the world through the gift. All great cases for support should do that—including the annual giving case!

Maxim #1: The Case for Annual Giving is NOT “Operating Support” or “Budget Relief”

Expunge those ideas from your writing and from your brain right now. Sure, that’s what you’ll do with the money, but who cares? Or, better: who is inspired by that? “Oh you need pencils and prizes and construction paper? Wow. Sign me up.” The better question is what you will DO with the pencils and prizes...

Telling stories—about our “pencils and prizes”—is at the heart of every aspect of our work. It’s what our program facilitators do in developing kids’ own stories about themselves. It’s what our staff, our volunteers, our donors understand about who we are and what we do. Told well, stories inspire us to action, to make the best better. Storytelling is in the fabric of who we are.

Maxim #2: Great Stories Have a Beginning...

Great stories start with characters; for your great story, it starts with a child who lives somewhere, believes things, does things, and experiences things. Great stories need to be imaginable, believable, and tangible.

As you craft your own case for annual giving—your story—start at the beginning. What is life like for the kids you serve? What does she see each day? What is home like? What is his experience at school? What does she believe about the world? What does he want to be when he grows up?

Maxim #3: Great Stories Have a Middle...

Great stories hook us in with an exciting plot; the kid in our story faces challenges, issues or adversity. There are different paths he can take in our story, but with the Health Rocks program, our story tells about what he experiences, what he comes to believe, what he can do.

As you continue to build your case for annual giving, tell a compelling story of what you do. What happens at the Health Rocks program? What does this child experience when she walks in the door? What is she learning? What is she dreaming about now? Sometimes, this is the only part of the story we tell in our appeals, through our events or face-to-face with our donors: “Please support our Health Rocks Program. Here’s what this program is…” or “Our kids have the chance to learn healthy decision making habits through our Health Rocks! program; please give to help us serve more kids.” We must tell this middle part of the story—what we do—but it can’t be the only part of the story we tell.
Maxim #4: Great Stories Have an End.

And it needs to come at the end. If a story begins with the “hero conquering the beast”—the big finish—why bother reading the rest? We know it all comes out OK. Your great story needs to make a journey with the kid, from his life before 4-H through his experience of Health Rocks to what her life will be like after this program.

The case for annual giving ends with outcomes, with what you achieve. To truly inspire increased giving—whether it is leadership giving at the $1,000 or $10,000 level, or from a $25 gift to a $250 gift—this story of what you achieve needs to connect back to the whole community. It is not enough to just change one child’s life, or even 1,000 individual kids’ lives; how is it changing their lives changing the whole community?

Statistics and hard data are important. But remember that they more important to some people than to others. To assemble your outcomes stories you should:

1. Access the information that the 4-H Health Rocks program has on the impact of this program network-wide. You may not have been delivering these programs for a long time, but others have. The advantage of being a part of a national network is those national resources.

2. Work closely with your evaluation team to be reporting on the approach you will be using, the data you will be tracking and when you’ll be able to start reporting back on it. What a terrific reason for a “next step” with your potential donors and champions!

3. Make a deliberate effort to keep in touch with the youth you served the longest as they move on. Being able to tell these outcomes stories are terrifically powerful to some of your donors. As well, the youth leaders in your program are a fantastic, inspirational example that few other organizations can boast.

Step-by-Step Actions

Sharing the case for supporting your Annual Giving Program is going to take many forms. Perhaps you first need a strong story to convince a community champion to step up their support of—and involvement in—your efforts.

You certainly will need inspiring talking points for your one-on-one visits with leadership donors. You’ve probably got mail and email appeals planned that need letters or messages written. And you’ve got a variety of events where you’ll be sharing your story verbally, through pictures or videos, first-person testimonials and in the written pieces you share before, during and after the event.

We don’t have long-term statistics on the impact of our programming. We just started tracking results through this program; what are our options for telling this part of the story?
By developing an overall case for support for the annual giving program first, you’ll ensure that you send consistent, integrated, and powerful messages throughout the year—and save yourself the anxiety of “re-creating the wheel” each time you need to communicate, “Why give?” to your potential donors. Like a grant template or a master proposal in the restricted giving area, an overall case for support is an inventory of language that you can turn to throughout the year as you build your event talking points, update your website, write an appeal, etc... It also ensures that your quality “thinking time” can be spent tailoring and personalizing the case for your top donors, rather than in creating and re-creating your core messages all year long.

Step One—Develop Your Overall Case for Support

Your inventory of language should include:

- An opening hook that grabs the reader or listener about why 4-H and Health Rocks exists, what this program achieves.

- Your story of “before”, “during” and “after” Health Rocks: these can be taking from real kids you have served, or it can be a composite story of the youth in your community.

- The impact that investment will have—why is philanthropy needed to achieve these outcomes versus school district funding or government support alone?

- Your unique ability to achieve the impact you are describing: this is not a call to belittle other organizations and the work they do, but rather to proudly and confidently explain why “Health Rocks!”

- Responses to common myths or misperceptions donors have of your organization that might include:
  - You don’t need philanthropy because (you’re publicly funded, have an endowment, have program fees, have United Way grants, etc...),
  - Small gifts don’t matter,
  - You don’t impact (my community, kids in my area, all kids, etc...)
  - Others need the money more, not “basic services”
  - You’re not financially prudent, well-managed
  - You’re not a “$1,000” organization, a “player” in the community
  - Anything else?

- Testimonials from lots of communities: kids, youth leadership, their parents, educators, clergy, community leaders, business leaders, government leaders...

- Statistics on “before”, “during” and “after: what does life look like for kids in your community? What trends are you looking to change? What statistics do you have on program effectiveness and delivery? What outcomes statistics can you point to that speak to what you achieve?

- Visuals that illustrate your point that can include: photos, videos or podcasts, drawings, sculptures, “creations” from your program

- A clear call to action—why support us and why now
To get starting in creating the overall case for support, gather ideas from your trusted advisors.

- Meet with the program team—youth and adults—who have been involved before and discuss the “before, during, and after” story and your impact on the community. Get their ideas. Test their assumptions about why you do what you do in the program areas.

- Meet with your key volunteers and champions to share the team’s ideas and seek their input as well.

Draft It. Block off a time when you do your best creative work and consider working out of the office, if you are likely to be interrupted.

- Give yourself permission to leave behind the jargon, the assumptions about the way you’ve always told the story and start fresh. Give yourself permission to really tell a story.

- What is the future you imagine for the kids you serve? What is the community of the future that you envision? What would it look like? What would be happening? What would not be happening?

- WRITER’S TIP: After you’ve gotten your thoughts out, then go back to the beginning and craft an opening hook or that “30 Second Elevator Speech”. That’s much more difficult to do at the beginning of the writing process and may lead to writer’s block.

- Your hook might be a short story about a child you’ve served, a reaction from a parent or a provocative statistic from your community.

Enhance It.

- Once you have the major building blocks of the story written, then identify and compile testimonials, statistics and visuals that can be used as the “back story” for your case for support.

- Remember to provide concrete data about the problems you are addressing and the outcomes you are seeking;

- Align your language with national messages

Step Two—Create Your Impact Statements

After your overall case for support, you will use your impact statements most often, verbally or in writing to inspire leadership giving. Impact “statement” is a bit of a misnomer; you are not trying to craft just a single sentence that speaks to giving a $1,000, $2,500, etc… gift. These one or two paragraph mini-stories speak to the specific impacts and outcomes of giving at the leadership level to your program.

You should develop these from your overall case for support and craft one for each of these leadership-giving levels: $1,000, $2,500, $5,000, $10,000 and $25,000. If you are just getting started and you’ve based your plans in growth in the $500 area, include an impact statement for that level too. If you don’t have anyone projected to give at the $25,000 level, you can set that aside for the moment, but be sure you cover at least the $10,000 level. And, consider that while no one may be there now, perhaps it is just because they haven’t been inspired to step up to that level yet…
1. Your impact statement at each giving level should answer these four questions:

- What will the gift support?
- What difference will this make in the lives of the youth your program serves?
- What are the outcomes a donor can expect from this gift or how will this make someone else’s life better (the community better, the state, society better)?
- Why should I, the donor, increase my gift?

The last question is particularly important. As you develop your impact statements, tie the gift level not only to specific programs or services but also to bigger and bigger outcomes that your programs achieve. You want to make the examples included in your impact statements tangible and link them to specific impacts and outcomes. As you move up the giving levels, the impact envisioned should get larger, more significant and more appealing thus giving the donor reasons not only to give, but to give more.

As you give your prospective donors a sense of the kinds of things their gifts will help accomplish or support, don’t feel that these must be a dollar-by-dollar accounting from your balance sheet. Your impact statements should not be a catalogue of what gifts will “buy”. This is philanthropy, not shopping!

2. Identify your core programs or program areas and the impact you seek to have through that program. Why do you deliver the programs you do? What do you want the kids in your program to believe about themselves, understand about the world, accomplish in your community because of your program.

**Bonus points!** If you want to get extra fancy with your impact statements, create a set of five for each of your core programs and use them to illustrate the graduated impact that this program has with increased investment. For example: a $1,000, $2,500, $5,000, $10,000 and $25,000 impact statement on all the things your Healthy Living Initiatives accomplishes at different ages and with different populations...

3. As you write, check your language for “social worker speak”, 4-H jargon or the language of youth development professionals. Nothing wrong at all with being literate in your field but remember that the rest of us aren’t!

4. Seek out stories that illustrate your programs and their impact. It’s great if you have the stories of real kids—leaving out identifying information—but it’s also fine to use a composite story of “a youth” in your programs.

5. Format your impact statement like this:

- Start with a story of a child before Health Rocks
- Then share what Health Rocks does to serve this kid
- Then share what she experiences in your program—or include first-person narrative of what was experienced
- Explain why you deliver the programming you do
- Close with what the donor’s gift can help accomplish—including your outcomes stories at this point.
Kayla barely made eye contact with the leader of her Health Rocks! group when she entered on the first day. Her shoulders were slumped and she seemed to disappear into her clothes. The youth leader of Kayla’s group noticed that when they broke into small groups for team work, Kayla was often picked last, or included least often—even though she shared great ideas with the leader.

Health Rocks! gives elementary and middle school age boys and girls hands-on contact with the tools to deal with peer pressure—the pressure to experiment with drugs or alcohol, to engage in risky behavior, to “give in” to what’s perceived as “cool”. Research shows that when kids are armed not only with the facts about the effects of smoking, drugs and alcohol on their bodies, but also the tools and ability to deal with and change their peer groups, the ability to not only live a healthy life—but have a successful social and academic career—increases dramatically.

Health Rocks! helps kids increase confidence and skills. This was certainly true for Kayla… In her Health Rocks! program, Kayla showed herself to have natural talent in team building, grasped the core messages of Health Rocks! quickly and became a leader in her classroom in setting a positive tone. These are all traits that will help her face the challenges of being a teenager. And they all came from her experience with Health Rocks!

Through Health Rocks! and the intensive, age-appropriate programs we offer at 4-H, we are helping kids to tap into their natural leadership abilities and lead healthy lifestyles. Your gift of $5,000 will help ensure that girls like Kayla turn into young women who may lead our program in the future—and will certainly be a leader in her community for years to come.

Step Three—Test Your Impact Statements

1. Start Inside. As you start sharing your first draft of your case for support with staff and volunteers, you want to be asking yourselves these questions:
   - Do people listen well when we speak about our program and our work? When we share the case?
   - Do we know our audience, what they value, how they listen? Have we captured what shared values their gifts will support?
   - Can the people we are trying to persuade to act on our behalf, articulate back to us who we are and where we are going? Do they “get us?”
   - Is there a call to action? Is it clear?
   - Are we jargon free, clear, compelling, urgent?
   - Does everyone explain our mission and work, and the case for giving, the same way? Can everyone describe who we are and what we achieve in 30 seconds or less?
2. **Test It.** As you look to make face-to-face contact with potential donors, asking them for their advice on your new (or revamped) case for support or impact statements is a great reason for a visit. Take it on the road, ask questions, and seek reactions from others.

Rather than changing direction or asking whether others think these are the right programs to be doing, you are seeking to test the resonance and relevance of the case and how you have articulated with leaders you trust.

- Invite discussion by a coalition of volunteer and donor leaders; begin with your trusted insiders—but don’t create an “echo chamber” with only people who agree with you 100%. Seek out big thinkers, strategic visionaries and philanthropic-minded individuals.

- You could also consider including community leaders who are invested in the program’s successful future as well as others who support other youth development programs in your community.

3. **Re-Draft It.** Tweak your case or impact statements and begin sharing it with a wider group within and outside the program.

- Use the draft to engage top donors, potential donors, potential volunteers, and community partners and potential partners.

- Testing your case and impact statement is very similar to testing your vision. There are tools and resources for how to host Vision Meetings—or Case for Support Meeting, in this instance—available on the Fundraising Toolkit.

4. **“Finalize” the Case.** You don’t ever want to stop tinkering, freshening, adding to the case for support or the impact statements but you do want to land on an inventory of language that will form the basis of your communications throughout your annual giving program fairly early in the year. After sharing it with trusted insiders, consider this language to be your final draft for the year—unless subsequent conversations with top level potential donors leads you to think that you’re off base in some areas.

**Step Four—Tell Your Story Many Ways**

1. You’ll weave this step throughout your action plan for your annual giving program. Remember to include a step for planning your message for your:
   - Mail appeals (email appeals, phonathons)
   - Website
   - At all of your events

2. The other ways that you’ll be sharing your story—that takes some action planning—is the storytelling that your team and volunteers will do as your ambassadors in the community. Whether they are soliciting for the annual giving program or not (and everyone is—directly or indirectly every time they tell your story), making education and development in this area a top priority will pay off!
To get you started, here are some techniques and approaches to consider in doing staff and volunteer development in this area:

- Ice-breakers or meeting openers:
  - “What are the core Health Rocks values from your perspective?”
  - “How does a 4-H kid behave? How does a 4-H volunteer group behave?”
- In meeting work:
  - Brainstorm and share each other’s 30 second elevator speech
  - Challenge small groups to develop a “commercial” for Health Rocks targeted at donors
  - Split the group in thirds—as one part to tell the “Before” story, the next to tell the “During” story, and the last to tell the “After” story of Health Rocks
- After each of these, debrief and discuss what worked as well as what additional information is needed to become more educated in telling your story widely in the community.

Step Five—Create Materials

1. “To brochure or not to brochure…That is the question.” OK. It’s a question. While you want all of your annual giving materials to be professional, and engaging, creating your annual giving materials are unlike a capital campaign case statement that you’ll want to live with for several years. Ideally you have a variety of images, language, testimonials, etc… (see Step One!), that you can drop into a desktop published template that fits your program. But do you really need them in a brochure?

   Keep in mind that more and more donors are turned off by “high gloss” (even in capital campaign materials). If your materials look like they could be changed, the testing, questioning and engaging of your donors that you do will have more credibility. Who is going to give you an honest reaction to a glossy, four-color brochure? Clearly you’re NOT going to be changing it anytime soon…

2. The same goes for your impact statements. Doubly-so, in fact, because then if you are reaching out to a donor whom you want to ask for $25,000 who is deeply devoted to the leadership development aspect of your Health Rocks program, you can pick up the impact statement that you initially created at the $1,000 level, for example, tweak it and turn it into a $25,000 reason to give. Voila!
3. You must, must, must have a presence on your website for donors that goes beyond your “Give Now” link or button. (But make sure you’ve got one of those too!) Integrate your impact statements, stories, testimonials and images throughout your website. Studies show that 85% (yes, 85%) of potential donors will visit your website for research purposes before making a gift off-line.

4. And of course, you’ll have this wonderful, robust, well-developed inventory of language that you can turn into proposals to foundations or corporations. As well, you can use this language to craft proposals to individuals for top-level gifts.

Summary of Key Points

Start by telling a story. A real story with a beginning a middle and an end. Don’t tell the “happy ending” up-front but build suspense over the course of your story. This magnifies the impact of the programs you provide and the outcomes you achieve.

Include many different voices in your story—testimonials from kids, from program facilitators, from educators and leaders in your community about the impact of what you achieve.

Make a plan to integrate your core messages throughout your annual giving program. The more effort you put in up-front to create a robust inventory of language, the easier the rest of the year will be as you tap into that case for support for lots of purposes.

Tools, Templates and Samples

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