

# Nonprofit Notes



➤ Building a Case Statement ➤ Smart Tech for Nonprofits

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## SUMMER ISSUE 2023

Nonprofits in the United States alone account for 5-10 percent of the country's economy and about 10 percent of U.S. employment (via Stanford Social Innovation Review). Nonprofit services remain in high demand and organizations continue to be challenged to do more with less.

Pushing through these obstacles together has been inspiring to witness - the nonprofit sector continues to embrace the challenges and is a driving force as they guide our communities through the new normal.

There is still a lot of work to do and you need a partner with a proactive approach to your organization's short- and long-term needs – all while never losing sight of your mission statement. At Davis & Hodgdon CPAs we approach your audit and accounting work always focused on your mission and strategic plan.



## Boost Fundraising Efforts with a Strong Case Statement

A strong case statement is critical for any major fundraising campaign, whether you plan to approach foundations, individuals, or corporate donors.

The main focus should be on the problem you are solving, your goal and the expected results. A good case statement is fluid and versatile, lending itself to various uses and - in the early stages - to key stakeholder feedback.

In many organizations those stakeholders are your active and engaged donors. If they take ownership of your mission, they may help you raise a good portion of the funds from other sources.

The best statements begin with a compelling story. The goal is to have the reader feel emotionally invested in your organization and cause by using storytelling to establish a personal connection.

Then, move on to a strong summary paragraph expressing the key need you seek to meet, why your organization is the right one to do so, and what your plan of action entails.

Create visual emphasis with charts, graphs, or maps demonstrating growth.

The writing is strong enough if it conveys a passionate sense of urgency and conviction that your work matters. This paragraph is often written last, after the rest of the paper has been developed.

The heart of the case statement is just what the name implies: making the case for support. Why now? What are key challenges facing your constituents? What is the demand for your services?

It's important to note that a strong, effective case statement is well-worth the effort it takes to create it. It can (and should) be used as the basis for your campaign materials and communications, including proposals, grants, brochures, a website and social media, and mailings. You also have the opportunity to report your program successes on page two of the 990 (sections 4a, 4b, 4c), so you should capitalize on that opportunity by using your case statement within the space allotted. Many 3rd parties refer to a nonprofit's 990 so it can be advantageous to include this information.

# Best Practices: Nonprofit Organizations Using Smart Technology

Nonprofits are using “smart tech” technology to shape everything from how they communicate to how they fulfill their missions with greater efficiency and effectiveness than ever before.

The use of smart tech could empower nonprofits to transition from a mindset that is dominated by stressful, time-consuming busy work to one in which they have the time to plan and strategize.

“At many nonprofits, smart tech is becoming integrated into internal workflows, fundraising, communications, finance operations, and service delivery efforts, freeing up staff to focus on deeper societal changes that need to be made.”  
(*Harvard Business Review*, 12/2021)

## Engagement

Digital engagement is reshaping the way nonprofits deliver services and communicate with a larger audience for greater impact. Now, more than ever before, nonprofits are turning to engagement platforms such as CommUnity, Breezio, Hivebrite, Thrive, and Mobilize to expand their reach and serve a larger audience for greater impact.

These tools can help facilitate a more personal experience for supporters and create a more comprehensive feeling of community for them – think discussion forums, event calendars, and online groups. They can also provide value to supporters through easy access to exclusive resources that are available through the organization.

More personalized digital communication methods also increase the ability of nonprofits to provide specific, relevant support to their constituents, allowing them to get the help they need faster and more efficiently.

## Fundraising

The ability to fundraise using online platforms has empowered organizations to reach a larger audience and encourage existing donors to give more. User-friendly platforms such as Fundraise-Up, Donately, Qgiv, and Donorbox enable many organizations to reach their fundraising goals much faster than ever before.



## Financial Management

Technology has the ability to reduce operating costs and improve a nonprofit’s financial management processes in many ways:

- Better data collection
- Improved financial analysis
- Streamlined reporting
- Improved cash flow management
- More informed strategic planning
- Better able to meet compliance requirements

For more information about best practices and how your organization could better use technology to achieve your mission goals reach out to Davis & Hodgdon CPAs today.



Questions? Concerns? With offices in Rutland and Williston Davis & Hodgdon CPAs has served Vermonters and beyond for more than 30 years through expert staff, high-end technology, and unparalleled efficiency. Our mission as your accountant is to provide the financial peace of mind for yourself, your business, your children, and future generations. Visit <https://www.dh-cpa.com/contact-us> to schedule a strategy session with one of our tax experts.