

# Writing the Case for Support:

## Are You Ready to Make Your Case to Donors?

**A preliminary case document is a key starting point in the discussion of impact and relevance |** Experience demonstrates that the preliminary stages of campaign planning significantly impact the ultimate outcome of a campaign. Take the time and put in the thought to do things right at the beginning and you'll be positioned for success throughout the campaign.

One of the first concrete steps organizations should undertake as they prepare for a campaign is to develop their case for support. For many the preliminary case statement is the first time they have articulated in one place their vision for the future of the organization.

A preliminary case puts on paper – in compelling and coherent language – why gifts will make a difference, more for our region or world, than for the individual institution. And it is much more than a document.

A preliminary case is the “*first draft for the future*” for the next era for your organization. Put simply, a good preliminary case is all about a unified vision for the future.

We deliberately use the word “preliminary” to describe the case for support. *This is a preliminary document and should be treated as such until the vision and components put forth in the case are tested with donors and refined based upon their feedback.* Often, however, organizations lack clarity and unity in their vision for the future, many without even realizing it until they begin to put pen to paper to develop their case for support.

Preliminary case development should not be a replacement for good, sound, advance strategic planning. In fact, the best case statements are the ones that derive directly from a good strategic plan and from a vision for the organization that the president and his or her team believe will make a major difference. Research conducted by the Lilly School of Philanthropy and JGA in 2013 confirms the critical role of vision (see “Are you Million Dollar Gift Ready?”).

Writing a case statement requires that organizations be able to link their strategic goals to the project and articulate how they will come together to make the world a better place.

Organizations must go beyond “We need a science building,” to be able to show the details of how the building will be used, what will be in it, who will use it, and *what difference it will make in the future of the organization, those you serve, the community, and the world.*

Transformative gifts are the ones in which the donor is trying change the world or the region – something bigger than the organization. Donors make a gift to the organization, but use the organization as a vehicle by which they can change the world. The most successful case statements we have observed utilize this perspective.

More than just facts, figures and renderings, a case statement must also humanize the goal. To be effective, a preliminary case statement must reach *both the heart and the head.*

**So how do you know if you're truly ready to create a preliminary case for support?** Here are five key indicators:

1. Does your organization **have a clear vision** for what it wishes to accomplish in the future?
2. Do the board chair and the CEO/President agree on the **top two or three goals** that have to be accomplished in the next five years? Is there buy-in from the Board? The Chief of Advancement? If you were to achieve immediate funding of the key components described in the document, would your board and staff agree these are the most important to do?
3. Can you show – in a 1- to 2-page format – what the **fiscal implications** are of the proposed campaign?
4. Can you clearly illustrate **what will be different** as a result?
5. If your preliminary case describes a facility, can you **show renderings, floor plans, and describe what will happen inside** that facility? And do you have solid, sensible estimates of cost?

This is not exhaustive but these do get to key questions you'd better be able to answer. And more importantly, questions that experienced and savvy prospective readers of your preliminary case will ask.

Sometimes, you will find as you engage your leadership team in dialogue on these issues that there is not clarity. At that point, you need to be authentic and take a step back to do additional preparation and analysis to achieve clarity. You cannot write a case that shows there is still internal disagreement about what you hope to achieve with the campaign.

If you take the time to prepare this preliminary document with care, you end up with a case that facilitates much deeper conversations with your donors about the future of your organization and their role in making that vision a reality.