



JGA Presidents Alert
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Making the Case for Support:

What resonates with your current and prospective donors?

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Experience demonstrates that the preliminary stages of campaign planning significantly impact the ultimate outcome of a campaign. We still tell clients an old tailoring expression: “measure twice and cut once.” When our clients take the time and put in extra thought at the beginning, they are not only more successful in dollars raised, but also have fewer delays or problems.

One of the first steps colleges should undertake as they prepare for a campaign is to develop their case for support. For many, the case statement is the first time they have articulated their vision for the future of the college. For some of them, it’s also the first time they’ve thought about motivating others off of the campus to invest in that vision.

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

At this stage, we should tell you that we use a modified term. We use the term “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, usually in a feasibility study, 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 institution that the president and his or her team believe will make a major difference. Research conducted by the IU Lilly Family School of Philanthropy and JGA in 2013 confirms the critical role of vision (see “[Are you Million Dollar Ready?](#)”).

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

For example, 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 institution, the students, the community, and the world.*

Transformative gifts are made by donors trying to change the world or the region—something bigger than the institution. Donors make a gift to the institution, but use the institution as a vehicle by which they can change the world. The most successful case statements we have observed utilize this perspective. They help potential donors see ways they can make great changes happen— or good things continue.

More than just facts, figures and renderings, a case statement must also humanize the goal. To be effective, a case statement must reach *both the heart and the head*. The best ones combine qualitative and quantitative elements.

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

1. Does the college 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 an exhaustive list, but these five do get to key questions you’d better be able to answer. And more importantly, these are questions that experienced and savvy prospective readers of your preliminary case and experienced donors 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 institution and their role in making that vision a reality.

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