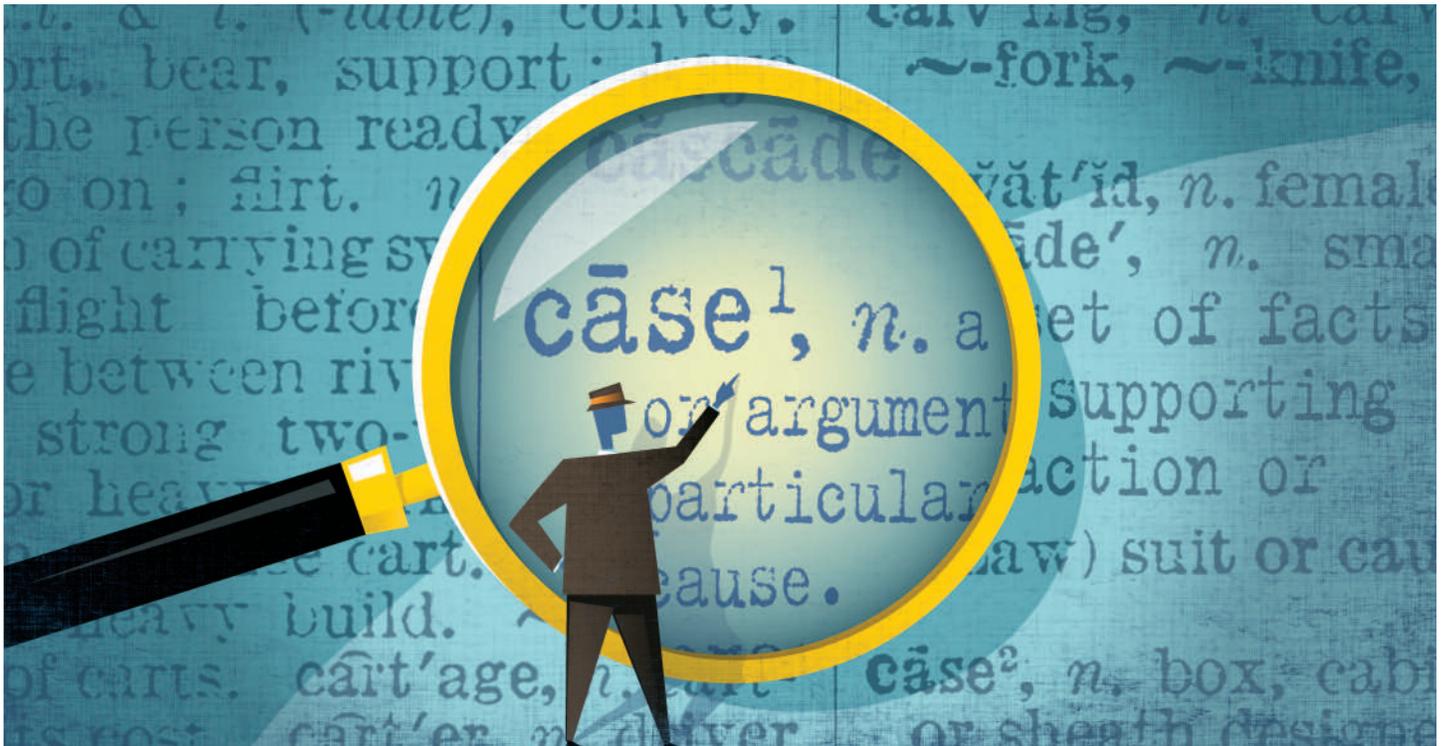


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## The Case Issue

In our work with non-profits, we hear a familiar refrain: "We need a Case!" "What's our Case?" "If only we had a Case!"

Most non-profits know they need a Case for Support because it helps them work smarter and get better results. But we've realized over the years that there seems to be many variations on the theme of a Case, from a one-page mission statement to a wish list of spending priorities. So what really is a Case?

For us, a Case is essentially a compelling description of what your organization does, where it wants to go and how it will

get there. I always say that if you have good prospects and a good Case, you can raise money. So why are good Cases so hard to come by?

I think they're difficult for three reasons. *One:* many organizations lack a solid, openly-stated and agreed-upon vision of who they are and where they're headed. *Two:* creating a Case can be a tough journey, especially when the destination or vision has not been fully determined and agreed-upon. And *three:* ambiguity around the word "case" can result in confusion at best, and at worst a missed opportunity to make the most of this vital tool.

In this issue, we'll explore the concept of the Case for Support and hear from some

experienced fundraisers on what it is, how to create it, how to best use it and much more. Our goal is to answer some of the big questions, clear up some confusion and paint a more complete picture of this essential and foundational tool that will strengthen the good work you do every day.

Enjoy all the best that spring has to offer!

Marnie Spears  
President and CEO

KCI >>



If you look up the word “case” in the dictionary, you will see it defined as a set of facts or arguments supporting a particular action or cause. In French, we use the word *argumentaire*, evoking a line of reasoning that persuades.

As illustrated by these definitions, we see the origins of the word related to our work as fundraisers – that charities need to make the “case” for supporting them. And while all of this is helpful, one big question still remains.

What exactly is a Case?

There is a tendency to throw around the word “Case” to mean a great number of things. One of the most pressing challenges with how the Case is being thought of and developed in many organizations

is the tendency to think of it through the lens of a written document that serves as the source for all communications and solicitation activities. Too narrow, this definition doesn’t encompass all the elements required to create a Case for Support, starting first with the organizational vision and the fundraising priorities.

You absolutely need words to describe your value and vision. But it’s tough to put words around value and vision when they’re contested, evolving, stale or absent altogether. When we struggle with creating the final Case document, it’s usually because we lack the necessary inputs: mission, vision, fundraising priorities, and investment opportunities.

Before they give, donors need the an-

swers to many questions. Who are you? Where are you going? What have you accomplished? Why should I support you? What impact will my gift have? For Ted Garrard, President and CEO, SickKids Foundation, the Case must answer all of these questions. “Donors will always need to understand your mission, vision, milestones, impact, strategy, leadership, needs and priorities, both on an overarching basis and related to your specific priorities. These are the attributes of any Case for Support. And so, in every document we prepare for donors, we speak about these things.”

The value and vision of the organization need to be understood and agreed-upon in order to raise money. People won’t give, at least in significant amounts, to a mission without specific spending plans.

Nor will they give to a spending plan without a mission or vision to guide it. These two elements provide the foundation for your Case for Support.

At United Way Toronto, Case development starts by setting organizational priorities and then determining the investment opportunities for donors to support those priorities. “To create our Case, we first set our priorities - Support a strong, responsive community services sector, Create youth success, and Build strong neighborhoods,” says Susan McIsaac, President and CEO. “The product development team then goes underneath each priority and comes up with the products or “investment opportunities” that donors can fund, which could be anything from a program to a physical space.” It is only then that the communications team puts together the external-facing communications to create and articulate the key messages around the priorities. And rather than one source document, the team creates multiple documents based on specific Case angles and messages as well as audience.

The concept of multiple Cases is something that Bill Bean, President and CEO of the QEII Health Sciences Centre Foundation in Halifax agrees with wholeheartedly. “We used to do an annual organizational Case for Support and then realized that this was something we were doing for ourselves that ultimately didn’t really serve the needs of our donors, patients and programs. We now have six campaigns, each with its own Case that is specific to each project.” Bean goes on to say that each priority is tied to the vision and mission of the health centre and that the Case for each was developed along with the QEII to determine the impact on many levels and dimensions.

*“Donors will always need to understand your mission, vision, milestones, impact, strategy, leadership, needs and priorities, both on an overarching basis and related to your specific priorities.”*

### Developing the Case

Simon Sinek, author of the book *Start with Why*, refers to Martin Luther King where he gave the ‘I have a dream’ speech, rather than ‘I have a plan’ speech, something that Bill Bean believes is critical to keep in mind when developing the Case for Support.

“In initiating the Case statement process, we would always find ourselves focusing on the process and who should be involved,” notes Bill Bean. “And while both are important, we have found that the power of the process is unlocked when we are able to tap into the ‘why’ of the projects and priorities for which we will be raising funds. Tapping into the ‘why’ is where we find moments of brilliance and inspiration that ultimately speak to the reason that donors want to give.”

And like so many things, the process is as critical as the outcome when it comes to Case development – for a variety of reasons. “The process we undertook was just as important as the product,” says Cathy Daminato, Vice President Advancement at Simon Fraser University, speak-

### What is a Case?

Is it your fundraising priorities? Or the internal source document that answers all questions about what you are trying to achieve and how donors can help? Or is it the external facing messaging that inspires donors to make contributions?

The answer is all of the above...and more.

A potential pitfall when thinking about and approaching the development of your Case is not fully comprehending that it’s impossible to create a “Case for Support” unless the organizational vision and strategy have been determined and

the fundraising priorities have been identified. Only then can you put the words down on paper that will serve to convince donors about the need, value and wisdom of supporting you.

A Case for Support is the entirety of your mission/vision as an organization, the definition of the fundraising priorities for which you will be seeking funds as well as the specific vehicles through which donors can make gifts. Once all these elements have been fully defined and described, the final piece of the puzzle is to create the words and messaging that will inspire donors to make their gifts.

Establish  
Vision /  
Organizational  
Strategy

Determine  
Fundraising  
Priorities

Create  
Investment  
Opportunities /  
Vehicles

Animate  
through Words,  
Messages

ing of the work they did to create the Case for their *Power of Engagement* campaign. "All along, we showed people what we were trying to do and engaged them so they felt it was *their* fundraising campaign." The outcome can be unifying as it pulls out fundamental disagreements and builds consensus and excitement within the organization.

According to Susan Horvath, Vice President, Leadership Philanthropy at the Canadian Cancer Society, creating the Case can be critical for internal education, helping internal stakeholders understand what fundraising is all about. "As we were undertaking the Case development process for our upcoming campaign, we had the chance to have conversations with the mission staff, many of whom thought the campaign was about fundraising," says Horvath. "This process enabled us to create an understanding that this campaign is actually about mission. The money we raise will let us deliver on our mission and we needed them to help us determine the opportunities for donors to help achieve that mission." For particular projects or for small organ-

## Why is the Case Important?

- Can be the most important document a non-profit creates
- Creates a shared understanding of vision and priorities
- Ensures a clear, consistent, pre-approved message across all communication
- Aligns fundraising with vision and priorities of institutional leadership
- Aligns fundraising with institutional branding and communications
- Extends brand and strategy into tangible projects needed to achieve the vision
- Packages projects for funding and naming as appropriate

izations, the priority setting and Case development processes can be a matter of weeks. But if you're a complex organization, it's going to be a complex process. In the instance of many universities, large arts organizations and major research and teaching hospitals, this process can stretch over many months. And it is a process that needs to be revisited regularly. In the case of SickKids, Garrard says that they revisit their fundraising priorities annually. "We revisit our fundraising priorities and Cases every year, asking whether we are able to close off priorities

because they've been funded or if we have new priorities. As a result, we are constantly retiring and refreshing and every time a new priority is agreed upon, a new Case for Support is put together."

### Articulating Your Case

While it's critical to acknowledge that the Case must be defined as more than words, the importance of the words and messaging can't be overlooked. Non-profits don't generally make things. Your product is your value (relevance, credibil-



ity, impact) and your vision (what you hope to achieve). And your sole lifeblood is funding freely given by donors, foundations and governments.

So while a core activity of every charity needs to be inspiring donors to give, they can't always be present to witness your actions and impact in the same way they could experience a product or service benefiting them. They can't know your vision unless you tell them. So words must stand in for actions, testify to impact and describe hopes for the future. To attract donations, you need to communicate your value and vision every chance you get through the spoken and written word.

But donors will be less likely to give to you if your words fall flat and fail to create excitement. All charities are doing great things. How can you get a donor to connect with yours in particular and convince them of the need, value and wisdom of supporting you? One key is how well you articulate your Case.

It is such a specific skill set to be able to tackle the written aspect of developing the Case. The writer's task is to synthesize and distil the raw materials: the personalities, passion, experience and direction of the organization and to ultimately package your needs into a saleable, inspiring and compelling format. This is a not easy process, no matter the size of concern. Top of mind for the writer is to be the advocate of the reader and potential donor. This helps steer clear of internal jargon about internal structures and concerns. The writer must always be asking: What matters to donors? What inspires?

For many fundraisers and development communicators, the final Case document is the well-thumbed resource ever-pres-

*All charities are doing great things. How can you get a donor to connect with yours in particular and convince them of the need, value and wisdom of supporting you.*

ent on their desktop, always ready to offer up a word, phrase or paragraph on anything you need to talk about, always perfectly reflecting your organization's goals and voice, giving you the confidence to speak or write on behalf of your organization without getting approval from the president for every sentence.

### Asking the right questions

Questions play a major part in creating a Case. Questions extract ideas, stories, not to mention the most interesting words from your most passionate supporters. So which are the best questions to ask, given that your Case writer will have limited time with each contributor? The answer is the open-ended question. These are basic, often banal questions that make no assumption about the responder or the response and are meant to draw out ideas, information, perspectives and stories. For example:

- What words come to mind when thinking about this organization? Why is it unique?
- What has it accomplished? What are its greatest barriers? Where is it going?
- Can you talk about the outcomes and impact of spending within each funding priority?

A Case provides all the answers for all your target markets in written form. The fundraisers, who are your everyday communicators, can pick and choose the messages they need for each situation, not only written words for brochures or the website, but also spoken words for presenting, meeting, and building relationships.

### Don't Forget the Stories

As much as cool reasoning and a rational business case are necessary, science tells us that we humans make about 70% of our decisions from emotional cues. So your Case, your line of reasoning, your argument: it also has to be pretty compelling on a human level.

- Why do you work here? What are you hoping to accomplish in your work?
- What or who inspires and motivates you every day? What discourages you?
- Can you tell me a story about ... An event that motivated you? A personal success? A barrier?
- Why do you give to the organization?
- What are your goals as a donor in general?
- What would you say to motivate others to give?
- To draw out a story, sometimes it's as simple as asking: What happened next?

These are only a few of the many questions that will shape your Case. Try a few and you'll be surprised by the incredible variation of interesting and eloquent answers you receive.

Stories are a hugely powerful way of educating, engaging and driving action. Ancient as the human race, stories have always helped us connect with each other by linking ideas to emotions and simplifying the complex. They create a visual for the audience, making a topic dramatic and memorable.

But further, if the story is truly universal, readers or listeners start to live the protagonist's challenges, rail against her hardships, cheer her wins and mourn her losses. We want to step into the story, alter it, make it our own and invite others to share it with us. Non-profits always have many fascinating stories to tell, from how micro-credit provides a living to an

African seamstress, to how a Canadian surgeon can perform miraculous operations thanks to robotic surgery, to a donor's emotional meeting with a promising student. The Case writer should try to draw out stories in every interview. Some organizations also hold special sessions for staff, volunteers and donors to share stories, both to inspire each other and to capture stories for fundraisers to use.

Another question people have is whether fundraising messaging should dovetail completely with the organization's brand. All fundraisers we spoke with for this issue agreed that it must. In the case of foundations that are structurally separate, donors do not see you as distinct

from the organization, and it doesn't help your cause to confuse them with a distinction. In the case of a campaign, there should be no gulf between campaign name and tagline and the organization's voice, messages, look and feel. In fact, they should be so aligned that you wouldn't mind the campaign brand taking over and standing in for the brand during the campaign – because it often does!

In the end, the Case isn't just the words on the page. It's what has gone into these words: discussion, brokering, consensus, excitement. And ultimately, it's how you use these words to inspire donors and volunteers that counts. >>

## From the Writer's Point of View

If you already have words to describe your mission, accomplishments, impact, vision and spending priorities, you have the basis for a Case. But the written word alone isn't enough to create an inspirational Case. You need conversation with real people: both inside and external to your organization. Through interviews and group sessions, the personality of the organization and the urgency of your needs emerge. A good writer will be able to reflect this emotion in the writing.

Your writer, and others on your team if you can spare the time, should talk with people on the inside (fundraisers, institutional communicators, program leaders, executives) as well as the outside (donors,

volunteers, beneficiaries). "We went external and got 20 national and international researchers around the table to weigh in on the big ideas to really change cancer and to begin to see what the pillars of our Case should be," says Susan Horvath of the Canadian Cancer Society.

When choosing which people to speak with, gravitate towards:

- The people who speak passionately and eloquently about your mission (use their words)
- The people in contact with your ultimate community impact (tell their stories)
- The leaders (weave in their vision)

- The stakeholders and approvers (involve them and address their concerns)

How many people should you speak with? The answer is: As many as you can afford. Of course the more people you consult, the more time it takes the writer to both speak with them and fold their input into the final product. In the end, you can create a Case with 4 interviews, or 24. But for big organizations at least, since the process can be useful and rallying, involve as many as you need to. We often say that if you don't have all the right people involved in the process, you'll spend more time later addressing their concerns.

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FORWARD THINKING