



## *Invest in an Inclusive Process*

### Who Should Write the Case for Support?

One of the earliest steps in preparing to raise money is to research and write a case for support. Unfortunately, not everyone knows what a case for support looks like or what it should contain. We can honestly state that the concept of the case for support is probably the least understood, and one of the greatest opportunities left unrealized.

Every industry seems to create and use its own jargon. The “Case for Support” is a prime example in the fund-raising industry — several simple and commonly used words. Some may innocently use the terms Case, Case Statement, Case for Financial Support, and even Business Plan interchangeably. But do all these mean the same thing?

As a firm we have always subscribed to Harold (Sy) Seymour’s classic definition (*Designs for Fund Raising*): *It tells all that needs to be told, answers all the important questions, reviews the arguments for support, explains the proposed plan for raising the money, and shows how gifts may be made, and who the people are who vouch for the project, and who will give it leadership and direction.*

Clearly, Mr. Seymour’s definition could not have presaged today’s communication via eMail, SMS text, Facebook and twitter. But what we too often lose sight of in our fast-paced society is the differ-

## *A Solid Organization and a Worthwhile Project*

### We Don’t Need a Strategic Plan . . . Just a Good Case!

Most development professionals can probably count on one hand the number of times a donor asked for the organization’s strategic plan. Rarely is anyone interested in seeing a detailed planning document — they just want a summary, or the elevator speech. So who needs a strategic plan?

Some may believe all that is required are the carefully crafted and compelling words from a fund-raising brochure or one-page brief — words that are so moving that the local philanthropist reaches an enlightened understanding about the value of your organization. How many times have you been asked for just the “elevator speech?” So, we repeat: who needs a strategic plan? Well, if you want a clear and concise appeal . . . ***you need a long-term plan for the organization.***

Our firm is often charged with developing a client’s preliminary case to set the stage for a campaign planning study. On occasion, this seemingly simple task can run into significant challenges. The preliminary case and its intended use requires a concise document of a few pages, one that presents a clear picture of the organization and its plan for growth and improvement. What could possibly be so difficult about that? Especially if the organization is considering major advancement that requires a major gifts fund-raising campaign, right?

**If you set out to develop a case statement before the strategic plan has been forged, your fund-raising success will only arrive through sheer luck.**

Crafting a preliminary case will be a challenging and difficult task if the organization lacks a strategic plan. If you set out to develop a case statement before the strategic plan has been forged, your fund-raising success will only arrive through sheer luck.

Goettler Associates prides itself on helping clients pursue and achieve challenging goals. And where our firm has been most successful

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## Your Case should include a Profile of the Institution

In today's fast and faster pace, we often lose sight of what should be included in the case for support. The preparation of your case for support should begin by creating a clear and factual profile of your organization. The accumulation and centralization of information is often the first vital step of positioning your organization. The following list will prove useful:

- **Institutional mission**

Role in society, philosophy or purpose, population(s) served, geographic area(s) served, specific programs and services and fees charged (if any), governance structure, and leadership

- **Record of accomplishment**

Brief history of organization, service growth and statistics demonstrating success, physical facilities and improvements in environment, current financial position, and growth in annual operations, sources of revenue and total net assets, explanation of any deficits, accreditations and accomplishments of the professional staff, organizational awards

- **Directions for the future**

Distinctive competencies and services that must endure, changes in operating environment and demands for service, further quantification of the community's "need" for services

- **Development objectives and plan of action**

Master planning, and other detailed research supporting goals.

## Who Should Write the Case for Support?

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ence between methods of communicating our vital message, and the process of determining the right message.

We believe that when organizations invest in a careful, deliberate and inclusive process of developing their case for support, they will not only be able to *tell all that needs to be told* but also able to *answer the important questions*, even in a twitter message.

The process of developing a case for support should first and foremost be a team sport. While responsibility for coordinating the process should be a development function, no one person should be solely responsible to draft the case document. Rather, the opportunity for involvement of internal and external stakeholders should be realized. Adopting the approach of collective wisdom will produce a better result, and will build a broader consensus for the end product.

The earliest form of the case should be a working document that welcomes frequent review and revision, is shared with key internal and external stakeholders for review and revision, and will be improved as a result of their interest, knowledge and perspective. A better, more refined document will result.

In this way, the task of producing an organization's case for support is truly a collective effort of staff, board and donors. This path to case construction is in stark contrast to the all too often belief that a case is best produced by a skilled copywriter or marketing staff person working in quiet isolation.

Naturally, the case process will move from research to presenting and stating your case. However, the case process is never complete. It is a continuous effort to communicate a message that you want people to remember, and then internalize into their own words. Each time a donor grabs hold of your story and then personally advocates with conviction for your organization to his or her peers, your case is being rewritten by another member of the team. The process of converting outsiders into strong advocates expands the number of people developing your case and improves the organization's message again and again.

How your message is finally packaged will depend on the size and breadth of your donor constituency. In a major gift effort the final form of your case may simply be the spoken word and personal testimony of one donor advocating the support of your organization to a peer.

In the end, a deliberate and inclusive process of developing your case for support will better serve your organization's fund-raising goals than by simply embarking on a quest to produce a glossy full-color brochure.



## We don't need a Strategic Plan . . . Just a Case Statement!

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is when a client's leaders were able to clearly articulate their future direction. Today's fast-paced and increasingly competitive nonprofit marketplace requires a plan — a strategic plan.

Let's be clear. We're not talking about the planning that most undertake as a matter of budgeting and normal operations, or a development plan predicting a five percent growth based on last year's activities and tasks. We mean a plan established through focused research, deliberate discussions and entrepreneurial thinking.

By necessity, an organization's leadership must continuously work to design its own future. To do so, staff and volunteer leaders must understand the external environment, the opportunities presented by that environment, and the organization's internal capabilities and constraints. Entrepreneurial planning must look at forces outside the organization's immediate control as well.

If your organization has not completed a careful planning process in recent memory, then it is incumbent upon the development function to challenge its leaders to re-engage. Our experience shows this work will be richly rewarded, especially if it is conducted in an inclusive manner. By asking your board members and other stakeholders to participate in elements of your planning, you will build their level of involvement in your organization's future.

### Ask fund-raising counsel to lead an inclusive development planning process that formally involves your external stakeholders in assessing the future.

Certainly, it's best if this thinking and these decisions are recorded in written form — most typically called a strategic plan — but don't let the burden of a title stop you from asking important questions of donors and involving them in these vital decisions.

Let's face it, very few people will ever ask to see your final strategic plan. Yet they do want to know that you, as an organization, have a clear sense of who you are, what your unique competencies are, and how these will impact the future.

The simple act of providing clear and concise answers to your most generous donors about the future direction or your organization will have a powerful and positive affect on their decision to philanthropically invest.

Once you do that, you will raise more money.

### *The Goettler Series*

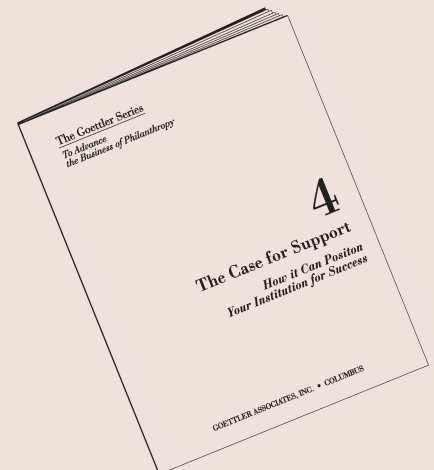
## **The Case for Support**

*How it Can Position*

*Your Institution for Success*

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The fourth volume in our acclaimed Goettler Series explains all those unanswered questions about how to position your institution in the philanthropic marketplace.



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## Goal Getter

# Ohio State Bar Association's Moyer Legacy Fund Reaches Goal

At the time of his unexpected death in April 2010, Thomas J. Moyer served as Chief Justice of the Ohio Supreme Court for nearly 24 years — the longest tenure of any sitting chief justice. In response, members of the Ohio State Bar Association discussed an initiative to raise funds in support of a lasting legacy that would embody the indomitable spirit of Thomas J. Moyer.

Collaboration quickly developed involving the Ohio State Bar Foundation, The Ohio State University Moritz College of Law, and the Ohio Judicial Conference, to establish a fund in support of legal education through state-wide fellowships and a named professorship at the OSU Moritz College of Law.

Fellowships will be awarded to students and graduates who embrace Chief Justice Moyer's dedication to integrity, fairness, open-mindedness, intellectual acumen, ethics, creativity, and decisiveness.

Goettler Associates was enlisted by the Committee to plan and implement a \$1.3 million fund-raising campaign to establish an initial corpus for the fund. As a new venture, with no existing staff, structure, or prior fund-raising results, leadership and financial support was sought from the Committee members, and the governing boards of the Bar Association and Foundation.

The Legacy Fund Committee, OSBA and Foundation Boards collectively contributed more than \$200,000 in support of the campaign. This demonstration of "family" support was a key factor in organizing the campaign. The next phase employed a law firm/legal community strategy that enlisted Metro Chairs for each of five metropolitan areas across the state. Ohio is home to several large law firms, and fund-raising counsel followed advice to contact these major firms at their headquarters. The Metro Chair approach was a success; and the law firm phase secured more than \$700,000 toward the \$1.3 million goal.

The final component of the campaign included financial appeals to businesses, corporations, and friends of Chief Justice Moyer from across the state of Ohio. With strong leadership from the Ohio Business Roundtable as well as The Columbus Partnership, a number of corporations pledged gifts to the campaign.

During a remarkable week in December, 2011, the Ohio Supreme Court held a ceremony to rename their home building in honor of Chief Justice Moyer. The Moyer Legacy Fund also held its second gala event and announced the \$1.3 million initial goal had been secured. Congratulations to Barbara Howard, Steve Stover, Alison Belfrage and the members of the Moyer Legacy Fund for their impressive campaign victory. Goettler Associates, Inc. is honored to have served as their fund-raising counsel. Additional project information is available at [www.goettler.com](http://www.goettler.com).