

## IN THE TOOLBOX

## Your Case for Support: Useless Until It's Used



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You've heard that a well-crafted case statement is essential for any organization that raises funds. Many experts provide helpful "how-to's" on researching and writing these documents, which serve as seminal pieces for guiding communications and motivating volunteers. But even the most beautifully written case statement is useless until it's used. Research and writing are important, but it's the roll-out that's key.

That may seem intuitive at face value, but consider the implications. If it is to have value, your case statement cannot be corralled in the development office – it's about your organization as a whole, and must be adopted wholesale. That means it's vital that you help your organization's leaders translate this vision off the written page and put it into practice in a wide variety of organizational areas:

### **Volunteer Training:**

Ownership of the case message is vital. Begin at the top, involving board members in multiple in-depth discussions about the case and its implications for the future. In these discussions, your chief executive has a tricky role: his or her buy-in must be evident yet restrained. Remember, people support what

they help create; a proselytizing president can short-circuit the honest push-and-pull discussion that it takes to build ownership. Eventually, the case should become part of the orientation for all new employees and volunteers, ensuring that the message endures and percolates outward.

**Fundraising and Sponsorship:** Messages connect when they are reinforced from multiple directions. Whether or not your case is to support an imminent campaign, think through all the communications your donors receive. How can your case perspective be appropriately incorporated into all of them? Might this new formulation of your message be attractive to previously unreachable donor prospects? One professional development organization I worked with in the past had minimal philanthropic history but, through a well developed case statement, was able to articulate a new, more socially relevant view of itself. It gained the confidence to win an unprecedented, multi-year grant from a major local foundation.

**External Relations:** The impact of your case need not be limited to donors; ideally the positioning should inform external

messages to all audiences. That means involving your marketing and program colleagues in both developing and rolling out the case. Be creative and enterprising in considering the channels for your message. If you have a major public event, of course the case message should be woven into the emcee's remarks. But don't stop there: let all your speakers know about how this event fits into your organization's mission. Often, echoes of your message will find its way into their presentations.

### **Program and Organizational**

**Development:** Generally, case statements are written in response to a new strategic vision for the organization. However, it can also work in the reverse. A compelling case can loosen calcified approaches and even influence structural change. Try this: at your board's next strategic planning retreat, ask leaders to explore how the organization could more fully implement the vision embodied in your new case statement. Give them free rein to imagine what it would take. New, energizing ideas are bound to arise. At a minimum, such an exercise forces leaders to think through – and own – all the implications of your case.

### **Remember the Three R's of Case**

**Statements:** **R**esearch your case through conversations with lots of people – everyone from leadership to new constituents. Follow that up with inspired **w**riting – let yourself go and capture your organization's vision in heroic, poetic fashion. But also carefully plan the all-important **r**oll-out. Because a case statement is useless until it gets used. ■

*For tips about how to write a compelling case statement, visit the Greater Chicago Nonprofit Gateway at <http://gateway.northpark.edu/>.*