

Ter Molen Watkins & Brandt<sub>LLC</sub>

*Strategies. Solutions. Success.*

*A Guide to Writing Your*

# CASE *for* SUPPORT

INCLUDES GUIDELINES & A SAMPLE CASE STATEMENT

**WHITE PAPER**

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# DRAFTING *your* CASE




## *What is a case for support, and why do you need one?*

The case for support will help to tell your story, clarifying for everyone what you do now and what you will be able to do in the future with the necessary financial support.

Different fundraising operations have different definitions as to what formally constitutes a “campaign case statement.” For some, it is an encyclopedic collection of all information pertaining to the campaign, compiled in one or more binders, and serving as a centralized reference for all campaign workers. For others, it is the universal campaign brochure, serving as the essential communications tool for all solicitors and prospective donors throughout the entire fund drive. And still for others, it is simply the fundamental logic of the enterprise.

There is no doubt that this core logic must be carefully thought through, and effectively communicated. Obviously, too, it must be supported by the institution’s strategic plan. If the logic holds, then the institution has the ability, and even the right, to ask its constituents to help support it.

# What QUESTIONS *should you* ASK?



*When preparing to write your case statement, you should ask yourself the following questions:*

## 1. Who are we?

When was this institution established, and by whom? What is our mission? What are the crucial elements of our history?

## 2. What do we do?

What is our core product? What are some validating statistics and accomplishments that improve our standing?

## 3. Why are we important, and to whom?

How are we unique? What niche(s) do we fill? How is the world (country/region/neighborhood) different because we are here?

## 4. What is our vision for the future?

What do we hope to become? How will this help us better carry out our mission? How will we then compare against our competition?

## 5. How do we plan to achieve that?

What are the steps our institution will take in advancing itself toward this vision? What is our strategy?

## 6. What do we need in order to succeed?

What specifically must we get that we do not have - buildings, professionals, program recipients (numbers/diversity)? What is our “reach”? How much will it cost us to secure these needed additions and enhancements?

## 7. How will we get it/them?

Will we build, renovate or acquire facilities? Will we “grow our own” experts from within or recruit them from outside the institution? Will we recruit them - raise/reduce barriers to entry? Will we market ourselves in new ways?

## 8. When we do, what difference will this make?

After we have succeeded at all of this, who will benefit, and how? Will the impact of our change justify the effort and the cost of our plans?

# DELIVERING *the* MESSAGE



## *What should the final product look like?*

There likely will be two versions of your case - a short version that you can share with those trying to understand it for the first time, and a longer one that you will use to fully support your path of logic.

The document can change over time, reflecting alterations to the plan and responding to the realities of the larger environment. The fundamental purposes of the case for support are to make sure that you remain true to the same case throughout the entire campaign and in all of your communications, and to organize your collection of plans and documentation so that it is available and ready at any time. This should be the one document that holds all your other communications to the same purpose, be they brochures, speeches, letters, proposals, or personal solicitations.

Above all else, your case statement must be “readable,” meaning that it must first of all be short and attractive, to induce the reader to even take on the task, and then it must be engaging enough to keep the reader going to the end. It must be well-written, using language and terminology that is easily understood by the lay person - no jargon allowed! Make it brief, with short paragraphs and headers, and be prepared to provide additional information as needed. Make sure you have some quality images included to illustrate your case.

A good test for the quality of your case statement is whether you would use it to recruit highly desirable new Board members. If it can help them understand what your institution is actually all about, and where it needs to go through their participation in the governance process, then it is worthy for use in fundraising.



**Neighborhood Care**  
Center for the Elderly

**SAMPLE CASE FOR SUPPORT**

*The following is a short case statement  
for a fictional organization, developed  
to assist you in your writing.*



## The Quality of Life Campaign

Since its establishment over 100 years ago, the Neighborhood Care Center for the Elderly has served this community and its residents. With the passage of time and the growth of our population, our aging citizens too are more numerous, and their needs are expanding as well, through the ever increasing life expectancy we all share as part of a healthy society.

To meet this important need, the Center must expand its services – and consequently its facilities – in order to care for the growing numbers of older members of our community. And to appropriately do this, we have determined to conduct a capital campaign for \$5,000,000.

The Neighborhood Care Center for the Elderly was established in 1911 to serve what was then seen as a wildly growing community of 10,000. Housing just 25 residents when it opened, it has expanded over the years to serve over 200 residents as well as hundreds of additional daily program participants each year.





### *Planning Stages*

The *Quality of Life Campaign* is proposed in order to fund a seminal institutional plan for the coming decade. The central feature of the plan is a building addition that will house another 50 residents, while expanding significantly the activity rooms available to both residential and day program participants, the most rapidly expanding service component of the Center.

In response to these burgeoning numbers, the Board of Directors of The Neighborhood Care Center for the Elderly undertook a most serious and ambitious strategic planning study, a process that included not only every member of the institution's governing Board, but some of its former members, as well as representative local residents and businesses, community public and private health officials, EMS (emergency medical services) providers, and a panel from the Residents' Council of the Center.

In all, some 45 people were able to offer their personal and professional experience, insights and projections for the good of the Center. The result of this effort was a clear recommendation for expansion, perhaps stated best by Alfred Albertson, 93, one of the Center's residents, who has lived with us for almost 16 years, who said with a twinkle in his eye, "This is not just about me, or even the hundreds of people just like me who depend upon the Neighborhood Care Center for the Elderly for our very existence. It's for YOU – you who build it will be needing it too, and before you know it!"



### *Expanding Our Facilities*

Once completed, the new construction will provide many new residential rooms – some singles and some doubles – enabling the Center to serve 25% more people who desire or require a full-time residential environment. Perhaps just as important – and in keeping with our commitment to sustaining the concept of our own “community” at the Center – will be the expanded services available to residents and day program participants alike, including:

- An extensive outpatient non-urgent care center
- An exercise room with classes for seniors
- A “hobby shoppe” that will allow supervised activities on an independent or group basis in everything from carpentry to quilting
- A multipurpose game room that will accommodate special parties and dances, and even family reunions
- A beautiful atrium lounge for greeting visitors or just enjoying a sunny day
- An expanded and improved dining room/cafeteria for regular daily meals
- Expanded gardens, walks and outdoor seating areas.

Some of these new or enhanced facilities will result from new construction, some from renovation of existing space. All work will be done in accordance with residential hours, which will be supervised not only by the Center’s administration, but by the Residents’ Council.



### Our Goals

All of this capital work is anticipated to cost \$3,500,000 by the time it is completed. In addition, a total investment of \$500,000 in new equipment and furnishings is budgeted. To help assure ongoing resources for operating support of the expanded facility, the campaign will seek new additions to the endowment fund (currently valued at \$6,000,000) of \$700,000. To assure uninterrupted financial support for operations, the Center's Annual Fund has been included in the campaign for each of its scheduled 3 years, totaling another \$300,000. The grand total of the *Quality of Life Campaign* is \$5,000,000.

When the work is done, and the new facilities are open for use, the Center will be able to accommodate slightly over 250 residents, and an estimated 500 day program participants weekly. This represents an enormous step forward in service to our community, and it is consistent with the mission of the Neighborhood Care Center for the Elderly, which states:

*"Let no member of the community who is in need of care because of age or infirmity be required to leave his family behind in order to get what he needs for continued health and personal fulfillment. We will serve our aging population in ways that respect our clients' quality of life, as well as that of their families."*

The *Quality of Life Campaign* will assure this for several generations to come.

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