

Making a Case: The Magic of the Word

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Excerpted from [*Making a Case Your Donors Will Love*](#)

I had just finished talking with Virginia Piper about a new science building for Xavier High School in Phoenix. One of the most charming individuals I've ever met, Virginia had a glow and a smile that gave hope in February.

Let me take you back.

I'm in Virginia's living room waxing eloquent about the proposed science center. Trouble is, it's only of modest interest to her. It's really the mission and the program of the school that fascinates Virginia. She loves the fact that it's all girls, the emphasis on rigorous scholarship, and most of all the focus on developing leadership in young women.

"Do you have something to leave so I can read more about the school?" she asks.

It's only personal style, but I don't like trotting out printed material until I've made the presentation. Sometimes I don't even do that. I prefer putting it in the mail for the probable donor to read, including a letter thanking him or her for the visit. It's a powerful reinforcement.

I hand Virginia the case statement. I wouldn't typically do that but she asks a second time. The case is called "The 7th Hour," a title with special significance to the school.

"May I take a moment to read it now?" Virginia asks.

I consider this an excellent augury. If she were tepid about the project, she could simply have asked me to leave it behind. And usher me out the door.

Something extraordinary starts to happen as she reads. The case gets a headlock on her. She loves it. She reads some passages out loud to me. Virginia excuses herself and goes into her study off the living room. When she returns a few minutes later, she hands me a check.

I peek at it, trying not to be too obvious. Good grief! It's a check for \$50,000.

"I'm so impressed with the story of Xavier I want to be a part of the program."

I hand the check back (we're actually hoping to ask for a much larger gift on the next visit). Virginia insists I take it, but we schedule a second visit, this time with Sister Joan, head of the school.

You can guess the rest, I'm sure. Visit Xavier today and you'll see the Virginia Piper Science Center prominently centered on campus.

My point is that no matter how dazzling the oral presentation, you still need to describe the need in writing and substantiate why your institution is uniquely positioned to fulfill it. You can see the power it had over Virginia that day.

I want to share with you now the seven significant ways your case should be used.

- 1. To seek agreement.** The case secures commitment among your primary leaders and board members. Everyone must agree and have a solid understanding of the organization's objectives and long-term goals. At times this is more difficult than it may seem. We were engaged by the CEO of one of the nation's most highly regarded cancer centers. "We're getting ready for a huge capital campaign," he tells us. "I want a case that's stirring." What we produced sizzled. It set off sparks. And it nearly singed the future of the CEO. The problem was he had no consensus from his board about the project he asked us to anchor the case around. One board member we interviewed told us: "I knew absolutely nothing about this project. We had no inkling. More than that, I don't think it's a very good idea. I'm damn upset."
- 2. As a roadmap.** The case provides direction and a defined strategy to your primary constituencies. It becomes an expert witness for how you will achieve your mission.
- 3. To describe results.** The case informs leaders and workers of the need and of your audacious dreams. It demonstrates and substantiates how the success of the endeavor will work to the immense and unending benefit of those you serve. You needn't be modest here. You're creating magical castles in the air. Your case lays the foundation.
- 4. To broaden the circle.** The effective case enlists new friends and leaders to your cause. Even those who may not have been familiar with you before reading the case are caught in your web. That's your job. You demonstrate how their investment produces untold benefits and results. It's an irresistible call to action.
- 5. To win over donors.** The case is an early working document and cultivation piece for prospective major donors. I love using it this way. Let major donors know your case is still in draft form—a work in progress—and that you want them to be among the first to review it and suggest changes. I send along a letter that reads something like this: "I am so pleased we're going to get together. Before our visit I'd like to ask you to take a few minutes to read about this new program. The enclosed piece isn't final yet and I want your reaction. Mark up your copy or circle any areas that you

may wish to discuss." With the letter I even send a red pen. What I find is that when top donors are asked to read the draft, with a request to help evaluate and perhaps edit the story, they actually read it. Used this way, a case is wonderfully engaging.

6. To carry the flag. The case is a document that helps readers endorse and share your vision. They accept a greater and ever-expanding responsibility of identifying with your invincible mission. They understand your loftiest aspirations. Robert Frost called it "that immense energy of life which sparks a fire."

7. To serve as a wellspring. Nothing happens until you first describe the dream. Then the case becomes the sourcebook and guide for the writing of subsequent publications, articles, foundation proposals, and video presentations.

Did you notice something about this list? I didn't once mention money. What? No talk of money?

At some point in the case, of course, you have to talk about how much the dream is going to cost. A case statement is after all a vision with dollar signs. But that's not your focus. Instead, your case is about challenges, about new ideas in confrontation with the old. You define the objectives, dispel questions, propel actions. You light the candles.

Or to put it more rudimentarily: The case isn't about leading a horse to water. It's all about making him thirsty.

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