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A Special Note:

For Gonser Gerber Tinker Stuhr, 2010 marks the 60th anniversary of the founding of our firm in 1950. In reflecting on 60 years of helping more than 700 non-profit institutions and organizations in achieving their highest destiny, the Bulletin will be used throughout the year to explore the major components of comprehensive advancement programs. Each issue will address essentials required for advancement success. The first issue of the series addresses the concept of advancement.

Concept of Advancement – Mission, Vision, Values and Case

In 1923, when the founder of our firm, Thomas A. Gonser was at Northwestern University, he pioneered the concept of development and used the term to describe the *development of the whole institution*. Development was never used as a synonym for fundraising. Rather, development included fundraising activities, communications, public relations, and efforts to attract patients/residents of the quantity and quality desired.

Today, the term “advancement” is used in place of “development” at many institutions because many perceive development to be a synonym for fundraising. But the concept remains the same; advancement as an institutional function that represents the advancement of the institution.

The GGTS concept of advancement holds that the *“highest destiny of an institution can be realized only by a concerted effort on behalf of that institution to analyze its mission; crystallize its objectives and project them into the future; and take the necessary steps to realize them.”*

Advancement is not just raising money, but raising resources to promote and extend institutional objectives.

The primary objectives of advancement are:

- ◆ To obtain greater awareness, understanding, acceptance and appreciation from those publics most vital to the institution;
- ◆ To secure sufficient voluntary philanthropic support for current operations, special projects, capital growth, endowment and long-term financial viability; and
- ◆ To acquire patients/residents of the quality and quantity that the institution seeks.

It Begins With Mission

Mission is foundational; it describes who you are – the institution’s purpose, why it exists and whom it seeks to serve. An institution’s mission is the most important building block for determining the institution’s focus. Mission also provides the primary reason donors choose to make charitable gifts. Donor surveys throughout the years have consistently listed belief in an institution’s mission as the number one reason donors choose to give.

An institution’s constituents value a well-crafted mission statement. For many it clarifies for them the importance of the hospital or health-care institution.

For others, mission may help them relate to and feel connected to something bigger than themselves. For the health and vitality of an institution, the mission and mission statement should be reviewed and discussed periodically. This can be done as part of institutional strategic planning or as a stand-alone process. Such a process helps insure that the mission and mission statement maintain clarity of purpose for the key constituents of the institution.

In her book, The Path, Creating Your Mission Statement for Work and for Life, Laurie Beth Jones writes, “There are three simple elements to a good mission statement. (1) A mission statement should be no more than a single sentence long. (2) It should be easily understood by a twelve year old. (3) It should be able to be recited by memory at gunpoint.” Her advice speaks to creating a personal mission statement, but her advice is also sound in considering institutional mission statements.

Vision Compliments Mission and Defines Your Dreams

While mission summarizes your institution’s purpose for existing and provides the primary reason donors choose to make charitable gifts, the element of institutional vision has become increasingly important. In fact, vision has become an equal partner in inspiring donor commitment and action on the part of stakeholders, especially in helping to inspire significant gifts to support programs, projects, and capital improvements.

Vision describes the destiny an institution sees for itself and the aspirations it states publicly as a “hoped for future state.” Institutional vision acts in harmony with the mission. Vision is a concept, an idea, a mental picture of what a hospital or healthcare institution can and will become. Max DuPree, former CEO of the Herman Miller Company, said, “We cannot become what we want by remaining what we are.” Vision helps drive an institution to achieve its highest destiny.

Institutional vision should be a compelling picture of the future which inspires commitment from stakeholders. The stakeholders of a hospital or healthcare institution include patients/residents, grateful patients, friends, Board members, community leaders, foundation and corporate decision makers, key volunteers, and staff. In addition to

positively impacting charitable giving, an effective institutional vision can motivate individuals not yet committed to the institution and its mission to become interested and involved.

Your institution’s vision for the future enlivens your mission. It deepens the meaning of your mission, keeps it relevant for today, and makes it future-focused. A well-developed institutional vision is a catalyst for commitment from all constituencies. Dr. John Maxwell, an internationally recognized leadership expert and best-selling author said, “Without vision, leaders can find themselves and their organization going nowhere fast. But a good vision can be the roadmap to an organization’s successful destination.” Every institution should know and understand in what direction it is headed to help insure its effectiveness and to keep stakeholders interested and committed.

Institutional vision allows stakeholders to see connecting points with their own personal values and dreams. This is a key point, particularly when considering the thought process in which individuals engage before making major gift decisions about your institution.

An effective vision will enable hospitals and healthcare institutions to inspire philanthropic support from donors who become compelled to give because of what will result from their investment. Individuals respond to “big ideas” of what their giving can help accomplish, making possible what may have previously seemed impossible. An effective institutional vision is pivotal in providing the direction, inspiration, and motivation necessary to transform what has been imagined into reality.

- Vision starts as a group of ideas, unformed and vague, which transcend the status quo, bridging the present and future
- From ideas, scenarios capture the imagination and evoke excitement
- Backed by common interest and desire, scenarios become intentions
- Intentions compliment an institution’s mission, attract commitment, energize individuals around a common purpose, and create meaning in the lives of staff, patients/residents, grateful patients, volunteers, donors and other stakeholders

The President/CEO, as the institutional leader, is the person responsible for crafting the vision. No individual has better perspective, more complete information, or greater influence from which to project vision for the institution than the President/CEO. In his book, On Becoming a Leader, Warren Bennis described vision as the “guiding purpose” and the “compelling goal.” “The vision projects how the organization will be defined in the future.”

Values Help Assure Consistency and Balance

What does your institution value? What are the principles in which your institution believes? Institutional values are what an institution says is important to it; they help inform your institution’s mission – its central purpose. Institutional values guide an institution in accomplishing its purpose; they determine the institution’s characteristics.

The following words and phrases represent examples of institutional values:

- ◆ Accountability
- ◆ Communication
- ◆ Community
- ◆ Dedication
- ◆ Diversity
- ◆ Equality
- ◆ Excellence – always pursuing high standards
- ◆ Faith
- ◆ Humane treatment of all
- ◆ Innovation
- ◆ Integrity – honesty in all things
- ◆ Justice
- ◆ Professionalism
- ◆ Quality – doing all things well
- ◆ Relationships – valuing others
- ◆ Respect
- ◆ Responsibility
- ◆ Servant leadership
- ◆ Service
- ◆ Stewardship – doing what you say with what has been entrusted to you and with efficiency
- ◆ Staff development
- ◆ Transparency

When an institution knows what it values, those values guide its mission and vision. Values help keep the mission and vision consistent.

Institutional values are also important for another reason. Individuals capable of making major and planned gifts often wish to take into consideration perpetuating the values which they hold dear.

The Case Pulls It All Together

The process of creating a case statement is an integration of the mission, vision, and values of the institution. The case statement process should not be rushed – the power of the words and the reasoning behind them is invaluable. It is the foundational document of any advancement program and ongoing fundraising effort. Creating a case statement is the crucial first step in meeting your advancement objectives.

A case statement is about the institution’s strategic priorities, programs and objectives necessary to achieve its priorities. A case statement communicates what an institution must do to improve or change its activities and aims, and why the institution is valuable to its region, state or nation, supporting faith community, and society.

A case statement should clearly answer the following questions:

- ◆ Who are we as an institution?
- ◆ What have we achieved and how?
- ◆ Why are we relevant for society and for the world, our denomination or faith community?
- ◆ Would anyone care if we did not exist?
- ◆ How are we distinctive from other institutions? How will advancement program success benefit patients/residents and strengthen the institution?
- ◆ Why is the achievement of advancement goals vital to our patients/residents, donors, the church, society and the world?
- ◆ How will success be measured?
- ◆ Why is the annual fund, major and planned gifts, endowment or a campaign important to achieving strategic priorities?

The case statement presents the ways in which the institution will remain significantly productive in the future – both through the generosity of its supporters and through its own efforts to operate more efficiently (to be financially accountable and to demonstrate good stewardship).

The case statement presents opportunities for the donor to receive satisfaction in making the gift – to join in partnership with your institution in the advancing of your mission. It is important for donors to know that their giving makes a real impact.

To be effective, a case statement must be written with these four Cs in focus: **C**lear, **C**oncise, **C**onvincing and **C**ompelling. It must communicate what your institution is about, where it is going, and how it will get there.

A case statement has relevance both as an internal and external document. There are five main uses:

1. *Obtaining Consensus* – about institutional priorities, the resources deemed most crucial, the avenues of services to be stressed, and the institution's vision.
2. *Recruiting Volunteer Leadership* – for the institution, such as directors, annual fund committee and advisory board members, and campaign volunteers.
3. *Focusing Messages* – from the President/CEO to Board members and other volunteers, to the advancement and communications staff – all must be using the same basic messages. The messages and themes of the case statement will inform all communication with internal and external audiences.
4. *The Basis for Solicitation* – it includes the foundation and rationale for solicitation of the donor in direct mail and phonathon appeals, along with major, planned gift and campaign solicitations.

5. *Testing the Market* – to help determine how major and planned gift prospects feel about the institution. It provides a means by which to bring the prospective donor closer to the institution and respond to its programs, strategic priorities and aspirations.

The most effective case statement is one that focuses on a vision for the future – those priorities that if met will strengthen the institution's service to the community, society, church, and world. It also focuses on meeting needs of the donor, community or region, supporting denomination or faith community, and the needs of society.

In Conclusion

Advancement is an institutional function representing the advancement of the whole institution. Advancement is not just raising money, but raising resources to promote and extend institutional objectives.

For advancement to be effective, your institution must understand its mission (its reason for being), and its vision (the destiny your institution sees for itself – the direction in which it is moving). Values determine your institution's characteristics, which guide it in accomplishing its mission. A case statement pulls it all together to communicate what your institution is about, where it is going, and how it will get there. To be effective, a case statement must be clear, concise, convincing, and compelling.

Hospitals and healthcare institutions which are growing, meeting their goals, and achieving their advancement potential have defined their mission in relevant and inspiring terms. They have developed a vision for the future which is bold and inspiring, and seen as vital to the communities they serve. They know what values they hold as important. Articulation of your institution's mission, vision and values through a compelling case for support will position your institution for success today and in the future.