

# Getting Approval on Your Case for Support



Time matters when you are developing a Case for Support or designing a Capital Campaign Kit. You want to have the materials to reach out to donors sooner rather than later. For some nonprofits, the biggest obstacle to reaching the finish line is their decision-making process. Revising the materials until everyone says okay, or just never making a decision are the result of an unclear approval plan. And delayed approval may result in extra costs. To avoid getting tripped up, put an approval plan in place at the start of the project, then stick to it.

## Solicit Input

Let's start with the basics — asking for input. You do want to get insights from a variety of stakeholders. Doing so not only enriches the final product, but also makes people feel good — their opinion matters, and that good feeling eases acceptance of the final product. But be sure that when people are asked for their opinions, they also understand that not every idea can be incorporated into the final product.

Soliciting input gets even more complicated when you start asking for feedback on specific concepts and colors. When you ask for people's opinions, you open the door to derailing the project. What will you do when one person prefers black and the other prefers blue? That's where the approval plan comes in.

## Lay Out an Approval Plan

To develop an effective decision-making plan, consider:

- Who will be asked for input? You may want to include some staff, board, and donors, but you also want to make sure that doing so will not result in someone feeling left out.
- Who will make the final decision? Usually this is the board or a subcommittee of the board.
- Who will make day-to-day decisions? Often, this is the head of the capital campaign committee made up of key staff and board members, or an executive director, development director, or a designated staff person.
- In what ways and how often will information be communicated between the day-to-day decision-maker and those making the final decision?
- How will you resolve differences of opinion?

One key to a successful process is frequent check-ins with decision makers. Present overall concepts, approaches, and directions early and often. If you don't, you may find that the final product can't get approved and you have to start over. It's easier to make revisions early in the process. In short, make sure your ladder is leaning on the right wall before you climb it.

## Manage the Process

While you may not want to make full presentations to the board at every decision point, at least report on the progress and the decisions made. This ensures that you don't get too far along before someone says, "Wait! We can't do that."

At the beginning of the project, establish the criteria that will be used to evaluate concepts and materials. A Creative Brief laying these out makes sure that some degree of objectivity is maintained when making a decision. It also ensures that everyone is on the same page about the goals of the project and the process that will be used to achieve them.

Decide in advance who will arbitrate a difference of opinion. Who will make that choice between blue and black? And beware of working too hard for consensus. As Lincoln said, you can't please all of the people all of the time. Explain why choices were made, listen to dissenting opinions, then make a decision. Otherwise, you'll end with a project that is black and blue and bruised all over.

Most important, remember that it is not the opinion of your board or staff that matters. It is the opinion of donor that matters most. The final decision should always be guided by what will resonate with them.