



Freund Associates
Technical Communication

The Case for Case Studies

Using Your Success Stories to Increase Donor Gifts

White Paper



Where Value and Values Meet

As a development professional whose goal is to generate funding for your hospital's capital programs or research projects, you are constantly challenged to find new ways to approach donors. An economic downturn and shrinking resources only make your task more difficult. You must, however, continue to deliver donor value while honoring the values that made them a donor in the first place. This intersection of where donor value and a donor's values meet is best represented by the **case study**.

The Power of Stories

Above all, a case study is a story, a success story. And people love stories. Stories define who we are as a culture, a society, a community, and as individuals. The sustainability of your hospital or organization—and your career—depends on donor gifts, which is why you need to tell your stories to your grateful past donors, as well as your potential new ones. You need success stories—stories of lives saved, conditions cured, and illnesses prevented because of a doctor's discovery of a new procedure, for example, that was funded by your donors.

Donors want to know how their gifts are being used, be it for a new wing (perhaps with their name on it), a scholarship program (perhaps with their name on it), or a research institute (perhaps with their name on it) created to battle a disease with which perhaps, they have had some personal experience. Donors want to know the story of how their gift resulted in a benefit to someone or in some cases, a serendipitous discovery that solved some other medical condition.

Use the power of your success stories to create case studies, and you can enhance your

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proposal by supporting your request for gifts. As a development professional, you know who your major donors are. Very likely you also know about their causes, their values, and their life stories. You may know if they lost a loved one to a disease or if they are battling one themselves. Ideally, you should have at least one compelling case study aimed at persuading each of your major donors that your hospital will give them the best return on their investment.

Testimonial vs. Case Study

A testimonial is a verbal or written statement of satisfaction, usually a sentence or two, from someone who has had a successful medical procedure or treatment, describing their experience with a doctor or hospital. Testimonials are often hastily written, grammatically incorrect, and rarely subject to a review or editing process to make them as effective as they could be. Thus, it does not come close to the impact of a case study that is professionally written, designed, and presented to a donor.

If your office is going to take the time and effort to solicit testimonials from satisfied patients, then you should also take the extra step and ask that patient be a part of your case study.





The Case for Case Studies

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Develop Your Case Study

The best source of knowledge for a case study is the doctor(s) who made the discovery or performed the procedure. A doctor's job, however, is helping to save lives, not writing about it or publicizing it. Likewise, your priority should be soliciting gifts and cultivating donor relationships, not interviewing, writing, designing, photographing, printing and uploading your case study. Writing your own case study cannot be your job.

Even if you are a development professional who also has the ability to write a compelling case study, you might think you would be the ideal person to document your successes. But you would be incorrect. Your interview with a loyal donor or grateful recipient would most likely resemble a conversation with your best friend and might be viewed as contrived and unconvincing. This is the reason you don't interview your best friend. You appoint a third party to provide the objectivity, credibility, and expertise you cannot.

Leverage Personal Expertise

To maintain your professional distance and to keep you focused on what you do best, you should strongly consider retaining the services of a full-service communication firm. For the purposes of this paper, we will use "Firm" to refer to the professionals—the interviewer, writer, photographer, graphic designer, printer and project manager—that may be involved in the production of your case study. A Firm experienced in the art of telling success stories will save you the time, effort, resources, frustration, and ultimately, money, saving you the time and expense of managing multiple tasks and professionals. For example, your major donors are accustomed to seeing and responding to highly professional documents and gift requests. You need to be sure your case study has a strong visual impact and reflects your professionalism, which is why

you need the services of a graphic designer. If you have a graphic designer on staff, then this should be relatively easy. If not, your Firm should accommodate your needs.

Likewise, you need a professional photographer to photograph your subjects, the doctors, and, if necessary, the relevant medical devices and facilities. Don't compromise the potential of your case study by taking photos on the fly with the camera in your cell phone. If you have a professional photographer on staff, getting photos should be easy. If not, your Firm should accommodate your needs.

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Finally, you will need to have your success story printed. Do not even consider printing your professionally created case study on your office inkjet printer. In fact, don't print it on anything less than a high-quality, color laser printer. Ideally, you should consult your print vendor, if you have one, to discuss paper type, stock, color and the remarkable advances in digital printing technology that makes creating great looking documents both easy and affordable. If you don't have a print vendor, your Firm should accommodate your needs.



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A compelling case study requires input from three primary sources:
the doctor, the donor, and the recipient.

It also requires output from your retained Firm, whose professionals will conduct interviews with these primary sources. Your Firm will be sensitive to the time and situational demands of each source of information:



The Doctor

Always busy and often difficult to pin down for more than a few moments at a time, a doctor will provide the primary information about a research project or medical procedure, often in terms incomprehensible to a lay person. Because the doctor will not have the time to define every medical or technical term, your Firm must be knowledgeable about the subject material and be able to translate it into a language that can be understood clearly by your target audience: your donors.



The Donor

Usually busy and in high demand because of many commitments and high profile in the community, donors are often generous with their money and generally, with their time, especially when it comes to promoting a cause that is close to their hearts. Your Firm must be sensitive to a donor's time constraints, eccentricities, ego, and personal demands, especially if your donor wishes to remain anonymous to the recipient.



The Recipient

As the beneficiary of the research discovery or procedure made possible by a donor's generosity, the recipient will have likely undergone a traumatic accident or injury, suffered a major illness, or experienced a life-altering situation. Your Firm must be sensitive to the recipient's condition and needs, being careful not to portray him or her as a pitiful or victimized. The dignity of the recipient and his or her family should be paramount. Your Firm should have the diplomacy and sensitivity to ensure that the recipient's dignity is always upheld.

The Case Study Formula

The formula for writing your case study comes down to answering 5 basic questions:

- 1 What was the problem the doctors were trying to solve?
- 2 What was the solution to the problem?
- 3 Who benefited or will benefit from the results?
- 4 How did or would the donor's gift help solve the problem?
- 5 How can the results be quantified or "dollarized?"



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Length of Your Case Study

The ideal length for a case study should be both sides of a standard 8.5" x 11" page, including photos. Interviews may be as long as 30 minutes for each source, longer if there are technical details and medical terms involved. If this is the case, it is important to include definitions of these terms. There are also source-specific questions designed to solicit answers that will make effective direct quotations. Understand that the following are general questions whose answers will generate more specific follow-up questions. Your Firm should know how to extract the necessary information from each source quickly and concisely.

Doctor Questions

- What is your name, age, education, and background?
- What are your degrees? From where?
- What is your title? Your responsibilities at the hospital?
- How long have you been practicing or researching here?
- What is your specialty and/or your area of research interest?
- Why did you choose this specialty?
- What was your goal at the onset of the successful discovery?
- What obstacles did you encounter along the way?
- How was the obstacle overcome?
- How did or would the donor's gift help you achieve your goal?
- How will future gifts benefit your research or practice?

Donor Questions

- What is your name, age (if appropriate), and background?
- What do you do? (e.g., business owner, philanthropist, investor, etc.)
- How did you become affiliated with the doctor, hospital, and/or recipient?
- Why did you provide a gift for the successful procedure/discovery/program?
- What has (or would) the result of your gift mean to you?

Recipient Questions

- What is your name, age (if appropriate), and background?
- What do you do? (e.g., title, occupation, career, etc.)
- How did you become affiliated with the doctor or hospital?
- What was your biggest challenge in dealing with your situation?
- How have you benefited from the procedure or discovery?
- Why would you recommend this doctor or hospital to others?



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Monetize Your Case Study

Your completed case study will create a powerful first impression, one that will make a compelling statement for its readers. You can feel confident in approaching your donors with a documented, persuasive record of your past successes. Make case studies an ongoing part of your proposals, marketing programs, capital campaigns, and annual reports. The sustainability of your hospital or organization—and your career as a development professional—may depend on it.



About Freund Associates Technical Communication

Freund Associates is a full-service communication firm specializing in technical and medical writing for business and industry. Founded in 1996 and located in northern New Jersey, Freund Associates is a certified woman-owned business that provides a tightly organized team of writers, editors, graphic designers, new media specialists, engineers, and project managers to serve clients anywhere in the United States.

Our approach to medical and technical writing can save you time, money, and worry. Freund Associates will:

- Simplify your project by providing a single point of contact. No need for you to coordinate multiple writers or resources
- Work with you to define the project, including audience, objective, scope, message, deadlines, and optimal media for delivery.
- Approach every project with knowledge of your industry and the ability to meet your specific communication challenges.
- Arrange and conduct teleconference calls or meetings with your in-house subject matter experts.
- Supervise your entire project and thoroughly review all work to ensure consistency of tone, format, and style.
- Deliver a high-quality product—on time and on budget—that can proudly bear your company name.

▶ To take the next step in telling your success stories with case studies, visit www.freundassociates.com, call **Dr. Annette Freund** at 201-512-0022 or email her at afreund@freundassociates.com.

Steps to a Successful Case Study at a Glance

- 1 Contact the doctor, donor, and recipient to get their cooperation and let each know they will be contacted by your Firm to be interviewed.
- 2 Authorize your Firm to contact each source directly to schedule a telephone call or in-person interview.
- 3 The Firm conducts and transcribes all interviews and creates a written document.
- 4 The Firm writes the “story” that becomes the body of the Case Study.
- 5 The Case Study goes to the Development Office and Legal Department for approval and sign off.
- 6 Requested changes, if any, are returned to the Firm and integrated into a template that has been designed specifically for the Case Study.
- 7 A revised and completed draft containing words and images is sent to the Development Office along with printing recommendations and specifications.
- 8 The Firm makes final changes, if necessary, and sends the approved document with printing specifications to the printer.
- 9 The Firm delivers copies of the Case Study, which can be presented to donors.
- 10 An electronic version (PDF) is uploaded to the hospital’s or organization’s web site.