



Case Statement – Example #1

Mission Hospital

Source: David Lees, nonprofit fundraising consultant
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“What’s wrong?”

It’s the most urgent question patients ask.

Since appropriate treatment depends on accurate and timely diagnosis, getting the answer is when healing begins.

Now, you have the opportunity to pioneer a new era in healthcare in south Orange County by helping to assure that the most highly developed diagnostic technology available anywhere in the world will be on hand close to home.

With your financial support of exciting new initiatives at Mission Hospital, you will be safeguarding the health and well-being of your loved ones and your community by helping to provide advanced care---and advanced caring. You will be encouraging medical leadership, while you express your appreciation for a healing ministry committed to quality and passionate about compassion. Your generosity will create beautiful environments for solace and provide a place for spiritual reflection. At the same time, your gift is a high-impact philanthropic investment.

Please make your gift today. And help transform an urgent question into answers people can live with.

Introducing the future...

Mission Hospital is a familiar south Orange County landmark, the big white hospital on the hill in Mission Viejo. And ever since it was founded almost 40 years ago, Mission Hospital has matched its sweeping view of the communities it serves with a progressive perspective on the future.

Always ready to welcome tomorrow, Mission Hospital is now poised to become the foremost diagnostic center in the world.

Cornerstone...

The cornerstone of advanced care---and advanced caring---leadership in diagnostics will involve more than simply acquiring the next version of existing equipment, the latest incremental nuance. Mission Hospital will provide an entirely new generation of diagnostic sophistication, with technology even faster, even safer and even more accurate than current capabilities offered here.

Weaving vanguard diagnostic technology into every facet of care, major Mission Hospital initiatives will include:



- Bringing patients the benefits of the most powerful Magnetic Resonance Imaging (MRI) technology available at any hospital.
- “Dual-source” Computed Tomography (CT) scanning, promising new possibilities in cardiac diagnosis, exams of patients with suspected pulmonary embolisms, and detection of lesions in the brain.
- Bi-plane angiography equipment, reducing the time needed for diagnostic procedures by more than 50%.
- Providing digital 3-D radiography that significantly cuts exposure to X-rays as it offers superior image clarity.
- Guaranteeing the utmost diagnostic confidence by combining CT imaging and Single Photon Emission Computed Tomography (SPECT), a nuclear medicine method utilizing gamma rays.
- Uniting CT and Positron Emission Tomography (PET) to furnish physicians with a wealth of data to pinpoint the smallest details in cancer diagnosis.
- Applying the advantages of revolutionary new ultrasound technology paired with lightning-fast data processing to deliver images of unparalleled precision.
- The Swenson Family Linear Accelerator Suite, diagnosing and treating cancer patients with Intensity Modulated Radiation Therapy (IMRT) that destroys cancer cells and leaves healthy cells intact.

Meanwhile, the new Mission Women’s Wellness Center will be the gateway to medical, spiritual and emotional services for women of all ages; nurse navigators will help women find their way to what they need---diagnosing individual concerns to provide seamless care in a nurturing environment. Throughout the Mission’s breast health services, dedication to early detection will be backed by an array of the latest diagnostic equipment, including new breast-specific imaging that allows many women to avoid surgical biopsy. The Mission Maternity Center renovation will include new technology giving physicians an accurate inside look at the health of mother and fetus during high-risk pregnancy.

Also furthering advanced care and advanced caring, the Williams Family Neuroscience Wing will team the latest diagnostic advances with its family-centered approach to care. In the Progressive Care Stroke Unit (PCSU) state-of-the art monitoring equipment and diagnostic procedures will track the condition of patients. Potentially dangerous heart rhythm disturbances will be diagnosed---and treated---in the new Electrophysiology Laboratory in the Mission Heart Center. And in the redesigned Surgical Intensive Care Unit, new technology will maintain a minute-by-minute vigil.

Away from the buzzes and beeps of modern technology, a new Chapel, funded largely by the Auxiliary of Mission Hospital, will be open to those of all faith traditions. Next to the Chapel, the beautiful Schumacher Healing Garden will be a serene setting for patients and loved ones seeking solace---and a place for meditation and prayer.

Finally, honoring the professionals who are on the frontline of care, a new endowment will support the Nursing Center of Excellence.



Putting principles into practice...

Mission Hospital defines diagnosis in ways reaching far beyond high-tech tools.

- Diagnosis is about listening---really listening---to the concerns of patients and families, paying compassionate attention to the physical, spiritual, and psychological aspects of each individual situation.
- Diagnosis means discovering what's right as well as what's wrong, so that Mission Hospital can help to improve the health of individuals, families, and communities.
- Diagnosis also demands discovering barriers to healthcare access, and originating programs that will eliminate them.

Guided by the values of the St. Joseph Health Ministry---dignity, service, excellence and justice---new diagnostic technology will be instrumental in putting into practice perfect care, sacred encounters, and healthy communities.

Perfect care...

Perfect care fuses the commitment to compassion with scientific discipline. Treatment protocols are rigorously evaluated and refined according to reliable data. Patients and their loved ones have the peace of mind of knowing that care at Mission Hospital is based on clinical evidence, continually improving and consistently surpassing national benchmarks. Excellence isn't a 10 letter-word for good enough; it's a proven fact

Clearly, diagnostic excellence is the key to perfect care. The sooner a medical problem is diagnosed, the sooner care can start; the sooner care can start, the more options are available to patients and physicians. And in virtually every instance, the more options, the better the outcome.

Early and accurate diagnosis spares patients anxiety and pain, conserves time and money---and saves lives. That's a perfect combination.

Sacred encounters...

Mission Hospital aspires to make certain that every interaction between people---every encounter---is sacred.

All are to be treated, yes, ministered to: Sensitively, Attentively, Compassionately, Respectfully, in manner that is Engaged and conducive to celebrating Dignity. Sacred encounters in healthcare depend on determining the specific condition of each patient; an informed beginning is essential for care that is sensitive to individual circumstances, attentive, compassionate and respectful of patients and families, engaged in providing optimal care, and serious about the regard for dignity. In other words, it's not the function of technology which is sacred; it is how technology functions to promote advanced care and advanced caring.

Healthy communities...

Everyone at Mission Hospital shares the belief that their work is also a calling. After all, the people they see aren't only patients; they're neighbors.



A nonprofit organization, Mission Hospital invests every penny of income over expenses in caring for the communities it serves. Unlike for-profit healthcare companies solely interested in the price of their stock, return on investment at Mission is gauged by how well people in south Orange County are feeling.

Last year alone, Mission Hospital allocated more than \$24,000,000---an average of \$2,000,000 monthly---to community benefit programs ranging from free asthma care to preventing childhood obesity, family resource centers to health insurance access. Camino Health Center, a fully licensed community-based clinic sponsored by Mission Hospital, logged more than 92,000 patient visits by individuals and families who were among the millions of Californians---half of whom are self-employed or work for small employers---without adequate health insurance coverage. Besides being a good neighbor, Camino Health Center helped to save millions of dollars by providing a primary care alternative to costly emergency room visits.

Leadership in diagnostic technology is a crucial piece of the mosaic of services and programs required to sustain healthy communities. No matter who they are, financially secure or financially struggling, patients deserve next-generation equipment backed by the expertise of doctors and nurses at Mission Hospital.

Comprehensive healthcare resource...

Mission Hospital is a comprehensive healthcare resource. National awards---and positive results for patients---testify to the level of excellence this hospital continues to achieve. People who live in south Orange County don't have to go elsewhere to find the kind of care they need, at every stage of life.

The only designated Trauma Center in the area is located at Mission Hospital. Home to internationally known neurological care, Mission is also the only community-based hospital in Orange County certified as a Primary Stroke Center. Cardiologists at Mission Heart Center provide a spectrum of services; Mission is also a designated Cardiac Receiving Center. Mission Cancer Center is accredited by the American College of Surgeons as a Comprehensive Community Cancer Center, and conducts clinical research in tandem with the City of Hope. The facilities of CHOC at Mission offer pediatric care, neonatal intensive care and pediatric intensive care in a distinctive hospital-within-a-hospital. Every year, more than 3000 babies take their first breaths at Mission Maternity Center, where there are more births than at any other hospital in south Orange County.

And the one-of-a-kind Rapid Response Team offers a new dimension in advanced care and advanced caring, quickly addressing significant changes in the health status of patients throughout the hospital.

No wonder Mission Hospital outshines California hospital averages in eight out of 10 categories and exceeds U.S. averages in patient satisfaction surveys conducted by the Hospital Quality Alliance.

Or that a recent study by the National Research Corporation reveals that south Orange County residents nominate Mission Hospital as their most preferred hospital, reporting that Mission has the best doctors, best nurses, best overall quality, widest selection of services, latest technology and most personalized care.

Patients and families say they feel a bond with Mission Hospital; they refer to it as “my hospital.”

Not just because it's so close— but **because it's so good.**



Spirit of Giving...

The close connection between Mission Hospital and its neighbors throughout south Orange County is renewed again and again through a unique spirit of giving, a relationship characterized by people caring for the hospital that cares for them.

Thanks to thousands of donors and thousands of gifts of all sizes, voluntary financial support---philanthropy---has paved the way for every major evolution of programs and services. Most recently, donors helped Mission Hospital reach the goal of its \$50,000,000 campaign to expand facilities. Highlights include completion of a new Patient Care Tower, renovation of the Emergency Room and Trauma Center, construction of the Swenson Family Pediatric Operating Pavilion offering private surgical recovery/preparation rooms for children, and the debut of the largest heart care unit in south Orange County.

Growing challenges...

Still, Mission Hospital and those who count on it face relentless challenges.

Almost daily, there is news about dramatic decreases in the amount of money private insurers and government programs alike are willing to pay for healthcare. Mission Hospital is expertly managed, ably governed by a volunteer Board of Directors, and financially stable. Even so, the economic climate in health care translates into a bleak reality---Mission Hospital is reimbursed only a fraction of its costs of providing care, and costs continue to rise steadily.

Decreasing reimbursements and rising costs are paced by on-going growth of the region served by Mission Hospital. The population of south Orange County is projected to continue increasing by 8% annually; the new community of Rancho Viejo, six miles from the hospital, will soon add 14,500 new homes to the area.

Question & answer...

Now, philanthropic support---your support---is more vital than ever before.

Your gift to Mission Hospital will positively impact lives---and save lives, too---for many years ahead. You will be helping to strengthen perfect care, deepen sacred encounters, and enhance the health of your community. And you will be helping to provide advanced care and advanced caring benefiting you and those you love.

Your gift is also a compelling philanthropic investment, yielding the equivalent of nine dollars of hospital revenue for every dollar you give.

Just as “What’s wrong?” is the most urgent question patients ask, the question of how Mission Hospital will have the resources to do more for patients, families and communities is urgent for everyone.

Your support is the answer.

Please make your gift today.



Case Statement – Example #2

Pacific Ridge

Source: David Lees, nonprofit fundraising consultant
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Building a Purposeful Life

“The new campus echoes who we are; open to the community, friendly with the environment, modest, but proud... like us.”

“It’s our school, that we helped found. What’s exciting is now we get to help build it too!”

“This looks comfortable to me. There’s a great balance between being efficient, looking nice and a feeling of hominess.”

“It’s a place to be proud of. More than just a place to learn. It is an inspiration to learn.”

“It’s our school and I want to help make this happen.”

“Wow!”

Listen

Students at Pacific Ridge are excited about the next chapter in the remarkable—and remarkably successful—story of their school.

Their enthusiasm focuses on building a high school and athletic center. They are eagerly looking forward to the promise of additional opportunities to learn and grow and connect with the world. Not only more room, but more ways to develop a purposeful life.

Your generous financial support is essential. Thanks to you, Pacific Ridge School students will have indoor and outdoor physical spaces equal to the dimensions of their dreams.

New buildings for building a purposeful life.

Living The Mission

“In a community that fosters academic excellence, ethical responsibility, and global engagement, Pacific Ridge School prepares students for college and a purposeful life.”

Those 23 words, the mission of Pacific Ridge School, are words to live by. Day in, day out, students, faculty and parents join together to create an innovative educational model that combines the best of traditional education with the latest insights into how students learn.



There's an unmistakable energy at Pacific Ridge; everyone who comes to campus feels it. Students are inspired by what they're doing. They aren't here to be taught, they are here to learn. And they're glad to be at school. Respectful of each other. Insightful and articulate. Most of all, they're still kids; young people whose curiosity and passion for learning are valued.

Accredited by the Western Association of Schools and Colleges, Pacific Ridge features curriculum surpassing California state requirements for college admission and includes an array of electives and advanced placement courses.

Learning is fully integrated. Instead of studying subjects in isolation, students are encouraged to see relationships between advances in science and their effect on world history, speaking another language and becoming world citizens. Students understand the connections between curriculum and current events, gaining the new-found rewards of participating in informed discussions with peers and parents. The rigorous investment of effort which education requires is transformed into the joy of suddenly seeing links between learning---and living.

Pacific Ridge is one of the only schools on the West Coast to incorporate Harkness learning across the curriculum. Introduced at Phillips Exeter Academy, Harkness learning is distinguished by lively educational exchanges among students and teachers. Sitting at a specially-designed oval table with their teacher, every student has a front row seat, in every subject, in every class. Partners in a community of learning, students are encouraged to ask questions. They debate and explore, while they learn empathy for other viewpoints and opinions. Empowered to think critically, students solve problems collegially, working in the kind of setting they are likely to encounter during college and throughout their working life.

Due to their balanced work loads, Pacific Ridge students have the opportunity to sample a variety of experiences---a star athlete can perform in a musical---without having to become specialists. Athletic participation complements academic excellence. Visual and performing arts nurture personal expression. Extracurricular activities enrich learning, with many clubs started by students. Students are free to discover their own cornerstone of building a purposeful life.

Ethical responsibility is woven into learning. By discussing a series of overarching questions related to the curriculum, students understand the importance of ethical decision making during an era of increasing complexity.

An expansive service learning program is a pivotal part of ethical responsibility, teaching the value of giving back. Students research and develop their own service learning projects, working in teams throughout the year to design and implement sustainable solutions to a local or global problem related to the curriculum they are studying. They learn leadership and group dynamics first-hand, along with research and problem-solving skills.

And they find they want to do more, give more.



Examples of solutions sparked by Pacific Ridge service learning projects include easing the isolation of the elderly by teaching them how to communicate with distant family members via the internet, eco-friendly programs to combat erosion, and even helping to construct a school in Kenya.

Teleconferencing with sister schools in Asia, South America, Africa, and Europe shrinks distances and expands perspectives. Viewing themselves as members of the global community, Pacific Ridge students evolve from being Local Citizens accomplishing community projects to World Travelers who participate in class trips to Global Citizens who hold internships and undertake global service learning projects. Closer to home, Pacific Ridge School embraces diversity among its students, faculty and families.

Global engagement is more than learning the geography and customs of other countries; its goal is to educate students about the impact of local actions on their community, their nation, and the world.

And so Pacific Ridge School offers a 21st century education. When information about virtually anything is instantly available, what students know is only the beginning. Applying their education to attain understanding--and then enlisting their understanding to do something meaningful---is what counts.

Founding...

One of the most powerful lessons showing students that dedicated people can affirmatively affect change is Pacific Ridge School itself.

In the fall of 2002, a small group of families met to address the need for excellent preparatory education in North County San Diego. The founding families consulted experts on independent school start-ups and fundraising. They began planning, and they spread the word. Volunteers from throughout the area got involved.

By 2004, the search for Head of School began. Dr. Eileen Mullady, an educator with an impressive background in secondary and higher education, transitioned from her position as head of the prestigious Horace Mann School in New York to come to California. She was especially drawn by the last phrase of the mission statement, "...and a purposeful life."

Throughout 2005, Dr. Mullady worked with veteran educators in America and abroad to design a curriculum embodying the ideals of the mission of Pacific Ridge School. Talented teachers from across the country were recruited. Next, a site for the new campus was secured, nestled in a hillside nature preserve in Carlsbad.

Then, in October 2007, the new school---Pacific Ridge School---opened its doors to its first 7th and 9th grade classes. Optimistic expectations were that the campus would grow to include 250 students by 2010.

The goal was reached in 2008, two years early.

The future has already arrived.



...and The Future

The Board of Trustees and staff have carefully crafted a master site plan that details far-reaching solutions to the positive—and pressing—challenges of continuing growth.

Though the master plan isn't burdened by the often outmoded legacies of many other independent schools, it didn't begin as a blank sheet of paper. Its contours are drawn by what is already working well at Pacific Ridge. Master planning is also informed by listening to many voices, including faculty and students, parents and friends, neighbors and officials representing the City of Carlsbad.

The result?

A plan that effectively accommodates growth and reflects the mission and values of Pacific Ridge School. Achieves the objectives of classroom and extra-curricular programs. Celebrates the intangibles of learning.

The master plan envisions that Pacific Ridge School will educate 510 students a year at full enrollment. Every step of the way, planning has been guided by simplicity, functionality, and environmental sustainability. Building design encourages interaction among disciplines, students and teachers---supporting the integrated curriculum.

Initial master plan implementation is underway. The 5-acre parcel of land adjacent to the school has been purchased. A synthetic athletic field is slated for installation this summer. The size of the campus will total 12.5 acres. Starting in the fall, the current field will serve as the location for portable classrooms for a growing student body.

The High School Experience

Centerpiece of campus expansion is a new high school building, where Pacific Ridge students will discover an educational experience matched to their aspirations and developmental level. In other words, upper school students will have a place to call their own.

Approximately 32,500 square feet, the high school building will include:

- Space for 19 classrooms configured for Harkness learning.
- Four science laboratories sophisticated enough for AP science instruction, equipped with secure preparation rooms.
- Faculty centers with glass walls facing areas where students gather will enhance faculty collaboration and curriculum integration while promoting informal student-faculty conversations.
- College counseling office, administrative offices and attractive reception lobby will complete the architectural program.
- Welcoming commons spaces with comfortable and flexible furnishings will invite students to study, meet, and relax.

Furthering collaboration and community among students and teachers, the new building challenges the conventional wisdom of school design. Interiors will be light and airy. Eye-catching rollup doors will harmonize indoor and outdoor areas. Open walkways will prompt person-to-person contact. The town square is an integral part of design. In the new high school building, everyone is engaged.



Athletic Center

More than 90% of Pacific Ridge students are active in athletics, and more than 87% participate in competitive sports. Against teams made up of 11th and 12th graders, Pacific Ridge student-athletes have distinguished themselves in cross country, flag football, lacrosse, volleyball, soccer and tennis. Several members of Firebirds teams have earned All Frontier League honors. Many students have played a sport for the first time; others have competed in multiple sports.

Pacific Ridge is part of new nationwide movement called Positive Coaching, which recognizes that learning life lessons through athletics is just as important as winning.

But nearly unanimous athletic participation has outpaced current capacity. Scheduling difficulties limit practice periods to three times a week, compared to other schools whose teams practice every day. Renting off-site facilities entails expense and inconvenience.

The new 31,000 square foot athletic center, second phase of campus expansion, will provide suitable space for Pacific Ridge students to balance intellectual achievement and physical activity, mind and body. At the same time, it will be a focal point for all-school assemblies and other major events.

In addition to the new synthetic field, the athletic center will include:

- Main gymnasium
- Weight rooms
- Locker rooms/showers
- Coaches' offices

Rather than a boxy gym dominating the school skyline, the athletic center will fit into the natural sloping grade of the building site; a green wall of plantings will break up large exterior walls. Overlooking the synthetic field will be an attractive viewing deck.

Enriching Education

During construction, the new high school building and athletic center will provide a chance for Pacific Ridge faculty to integrate into the curriculum topics related to growth and change.

Noise and other distractions will be minimized by construction walls, designated construction vehicle entry points, and other measures.

Gold Standard

Environmental sustainability is the cornerstone of both the high school building and the athletic center. Pacific Ridge is committed to becoming one of the few schools in California to receive gold accreditation from LEED (Leadership in Energy and Environmental Design). Awarded according to stringent standards that emphasize quantifiable results, LEED certification is a nationally accepted benchmark of environmental responsibility.



Highlights of Pacific Ridge meeting LEED standards include:

- On-site solar power.
- Recycled construction materials.
- Natural lighting for 90% of classroom space.
- Passive ventilation for nearly 50% of classroom space. Large bay doors will provide 100% passive ventilation in the main gymnasium of the athletic center, eliminating the need for air conditioning.
- Reduction of landscape irrigation by 50%.
- Overall 42% reduction in energy consumption compared to traditional school buildings.

Seeking LEED certification parallels the values of Pacific Ridge School and its students---conscientious local community members, respectful world travelers, responsible global citizens.

Timely Solution

Without a doubt, Pacific Ridge School is at a critical crossroads in its evolution.

The choice is clear: Pacific Ridge School can either continue the tremendous momentum that has brought it so far, so fast---or it can stop, hoping to start again some other day. Of course, it could get along by trucking more modular buildings onto the campus. But the costs of such a makeshift option are nearly the same as constructing environmentally responsible buildings that align with the character of the school. And the City of Carlsbad has placed strict time limits on the use of modular buildings. Students, faculty, families---and the mission of Pacific Ridge---merit more than a temporary solution.

Building for a purposeful life will provide optimal size and scale for continued growth, continuing excellence. And declare to colleges and prospective students, family and faculty that Pacific Ridge is here to stay.

Now, right now, is the time to move from pioneering to permanence.

Building A Purposeful Life

Plans for the high school building have been approved by the City of Carlsbad; the project is shovel-ready. High school construction could begin in less than six months, if funds are available. Favorable costs of materials and labor argue for starting as soon as possible. Construction scheduling is set to assure that students of the first graduating class will be able to attend classes in the high school building during their senior year.

The budget for the new high school building will be \$20 million. Once funds have been raised for the high school, construction of the athletic center will begin. Costs will be \$10 million.

During this uncertain economy, one thing is certain: investing in our children is the best investment we can make. After all, it is our children who will create the future. Your financial support of this project will touch their lives, and the lives of all they influence. Important today, your support will have lasting impact on tomorrow.

Please make your gift today.

Because building a purposeful life deserves spaces where lasting memories are made, places where futures begin.