



ABOUT CASE STATEMENTS
by Maria Gitin, Certified Fund Raising Executive

What is a Case Statement?

Case is a written document, a prospectus, a summary of reasons to support and work for your organization. It is written in every day language, marketing-style, for the average layperson not familiar with the language or programs of your group. It is written to excite and to motivate the reader to action - to give funds, time, or other kinds of support. It may inform and educate but never “preach”. It must be inviting and make the reader want to become more involved.

Why should we develop a Case and how will we use it?

1. *As a basis for written and verbal fund raising appeals*
2. *To tailor for and leave with or send to major donor prospects who request more information*
3. *To inform and inspire prospective board members, volunteers and employees*
4. *As a “copy platform” or “boiler plate” language for marketing pieces, press releases, brochures, public service announcements and proposals to corporations, foundations and individuals*
5. *As a unifying statement, “party line” to be determined internally and presented externally so that group representatives sound and are informed and aligned*

What will the finished product be?

An attractive, easy to read document or collection of pieces in a binder, folder and online. Ready to use as is, or printed with photos, graphics and other addenda to be used externally. A basic text or prospectus to which other items, budgets, giving opportunities can be added.

What questions should the Case answer?

1. **MISSION & VISION:** What is the purpose or special need that cannot be met elsewhere or in another way? What is the heart and soul of this organization? What is the vision behind this campaign?
2. **GOALS:** Building a building is not a goal; the program/services within justify the building. What are the "Big Picture" goals of this program, this organization?

3. **OBJECTIVES:** What specific objectives are to be achieved through this program, this expansion? How will a contribution improve services? Secondly, what are your fundraising objectives in each category and what acknowledgment/recognition opportunities are available?
4. **PROGRAMS AND SERVICES:** Detail the programs, opportunities the program will offer and why this method, approach is the best.
5. **GOVERNANCE:** Who is responsible for this program, activity, building? How are decisions made? Give background of key people/campaign team.
6. **STAFFING (Administrative, Program staff, Volunteers):** Establish credibility of staff and volunteers. Explain training, evaluation methods.
7. **FACILITIES:** Describe building project in detail. Include plans, drawing if possible.
8. **FINANCES:** Show fund development plan. How many gifts in each category will be sought? Show gifts already pledged/received. Allow for building cost overruns (15-25%) and pledge shrinkage (5-10%). Include fund raising budget: brochures, mailing, consultants. Show budget for operations. Demonstrate planning and fiscal responsibility. Timetable for fund drive and building. Projected operating budget. What contingency plan is there?
9. **ORGANIZATIONAL PLANNING, DEVELOPMENT AND EVALUATION:** This section demonstrates the competency of the organization to achieve its goals. Track record, process by which the building project was planned and the fundraising goal was set.
10. **HISTORY:** Give brief history of the organization, contributions to the community, landmarks and links to other groups. Add lists of partners, affiliations, accreditations, funders to date.