

Creating a Case Statement

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What is a Case Statement and Why Do We Need One?

In the world of fundraising, telling a good story is the first step toward reaching your goals. Without a good story, donors don't have anything to buy into when they give their money or gift to you. To help you tell your story, it is best to put your knowledge into a formal case statement. This statement answers the following questions:

- How does this organization help people?
- Who do we help?
- What vital services do we offer?
- What is our organization's track record?
- What are our plans for the future?
- How do we use our money?
- Why do we deserve support?

A good case statement is the starting point for any conversation with potential donors. The statement is the best way to make a good first impression. In just a few pages, an organization must use the case statement to connect the donor with the mission and vision, and build commitment to his/her goals. It is only when a donor embraces the cause that they start to give consistently to an organization.

Answer This: The Formal Case Statement

(from The Complete Guide to Fundraising Management, Stanley Weinstein)

The formal case statement states all the reasons for supporting a particular nonprofit organization. It answers, with brevity, all of the following questions.

1. Organization History
 - Founded when and by whom
 - Major accomplishments
 - Milestones in the organization's history
2. Whom does the organization serve?
 - Demographic information
 - Description of a real person who benefits from the organization-share testimonial or anecdotal true-life experiences.
3. What needs confront the people served by the organization?
 - What pressing problems does the organization address?
 - What challenges to the people served face?
4. How does the organization address these challenges?
 - What programs does the organization offer?
 - What services are provided for people in need?

Strengthening Alaska's Anti-Hunger Network

5. What is the organization's reputation for managerial and business discernment?
 - What evidence can be offered pertaining to the organization's stability?
 - What evidence can be offered pertaining to the fiscal responsibility--for example, year of deficit-free operations?
6. How is the planning process described?
 - Who participated in the strategic planning process?
 - How broad-based was the process?
 - How thorough was the planning process?
7. What are the goals for the future?
 - What are the program, financial, facility, technology, administrative, governance, human resource and diversity goals?
 - How will those in need be served better?
8. How will the donor's investment be used?
 - Why is the fundraising campaign being conducted?
 - What are the organization's key budget items?
 - How do these expenditures relate to the organization's mission and services to people in need?
9. How will the donor's involvement be acknowledged?
 - Describe gift opportunities
 - Describe the intangible benefit the donor receives by this philanthropic investment

Situation Specific Case Statements

Once a formal case statement has been created, the statement can be modified for a variety of situations. Some foundations and donors are impressed by lengthy descriptions, but most are not. If they read at all, they are more likely to read a summary of 2-3 pages.

The formal case statement, usually 5-6 pages long, should be pared down to a one-page, front and back sheet in black and white that uses bullet points to express the most important topics. This can be used for volunteers or large group presentations.

Additionally, the case statement can be transformed into a PowerPoint presentation or video as your audience changes.

Avoiding the Biggest Mistake

From a donor's perspective, organizations don't have needs, people do. While you may view your organization as needing funds to keep providing services, donors perceive your organization as needing funds so you can help more people. Always remember to write your case statement as if you were in the shoes of the donor.

More Resources

For more resources, contact Kerri Burrows, Alaska Food Coalition Manager, at afc@foodbankofalaska.org or 907.222.3103.

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