



## Defining the Case Statement

### What is it?

The case is the best, clearest articulation of your mission and how you fulfill that mission, along with a presentation of the required budget and proposed strategy to raise the needed funding.

It is a marketing piece, a tool to be used in presentations to individual donors. Therefore, the target audience is always the major donor. Avoid the temptation of producing a brochure in which you are “talking to yourselves,” i.e. simply extolling your mission’s virtues rather than showing the benefits of what you are doing and laying out a vision for the future. Deliverable and measurable outcomes should be part of the section presenting out the costs.

It should never be treated as a direct mail piece used in mass marketing appeals. The primary use of the case is in personal meetings with prospective donors where the individual or couple has been told prior to the meeting that there is a fund raising agenda.

The case should serve as the foundation piece for all communications and events as well as for development, including foundation proposals. It should be the driving force behind all communications and events.

### How do I use it?

Always use your case statement in the context of a face-to-face meeting. It is a presentation tool to structure the ask and is really more useful for the presenter in the meeting than the donor. It is not a “silver bullet,” i.e. a direct mail piece that can be sent out with the expectation that the money will pour in. Fund raising is a relational endeavor.

The case statement works in the context of relationships with donors. It is simply a means to articulate what your organization is committed to, and what it is doing now and proposes to do in the future.

# Ten Elements of a Good Case

Successful fund raising depends on good communication with donors. An organization must be able to articulate its vision to those who may be interested in investing in its mission. The document used to articulate this vision and to explain what action is needed from the donor is the case statement. It is a marketing tool, so attention must be paid to layout and copy in order to make it attractive and motivating.

By way of review, a complete case statement has 10 elements:

Theme, need, mission, value added, program, impact, vision for the future, funding requirements, gift plans, and profile of leadership. These elements are defined in detail below:

## **1. Theme**

The theme is often the hardest piece of the case to come up with. A well-developed theme will appear as a single thread throughout the case statement: the title, headings, and body copy. The theme should express, in a creative way, the communications objective of your case statement.

## **2. Need**

If your prospects are not individuals served by your mission, a statement of need at the outset of your case is essential. Describe it graphically and lead up to why your mission is needed. Be provocative. Your audience is not a “believer,” necessarily. Talk about the needs of those you serve. In this section, do not address how your mission meets these needs. You merely want to make the case why your mission is needed. A helpful way to approach this is to think about why you are in the mission. Make it autobiographical. This should give the statement of need some power and passion rather than simply list interesting but abstract ideas.

## **3. Mission**

What unique contribution does your mission make? Present your organization’s purpose in fresh language that is unique to what you do. Do not recreate the wheel here — use existing mission/purpose statement and interpret it for the donor.

## **4. Lifetime Value**

What are the long-term results you envision as a result of your organization’s mission and programs? What value are you adding to individuals and communities you serve?

## **5. Program**

Outline the programs and activities you employ to carry out your mission and respond directly to funding needs. Include list of ongoing priority programs and any proposed initiatives.

## **6. Accomplishments/Impact**

What evidence is there that your organization is providing the benefits you have identified?

Share testimonials of people you serve, those who have been impacted by your mission and, if appropriate, list objective data demonstrating your impact and accomplishments.

## **7. Vision for the Future**

Where are you headed over the long term? What is the overall vision of your mission? Again, you may want to revisit the idea of why you got into the mission in the first place. It's okay to make it personal.

Paint the vision in broad strokes and relate it back to your mission and values. Make it exciting but don't exaggerate. Relate it to why you are raising money now, making it clear that by investing in the current development program your donors are leading the way to fulfilling this future vision.

## **8. Funding Requirements**

What is the overall financial goal, when do you need it, what do you need it for and how much do you need for each of the components? Express these components in programmatic terms — remember, this is a marketing tool, not an accountant's spread sheet.

## **9. Gift Plan**

What is your strategy based on your priority prospect list and how many are already giving at what amounts? List the number of gifts needed at each level starting at the highest on down including those you hope to have based on your strategy.

Present the gift levels in three basic groups: high, middle, and low. Dividing the gift levels into 3 sections will be helpful when asking for a gift commitment.

## **10. Profile of Leadership**

What are the basic facts about your mission, who are the people you serve, and who are the key players leading your organization and programs? Include your address, phone/fax numbers, email and web site.

**For More Information:**  
**Evangeline Pattison, Consultant**  
**epattison@thefocusgroup.com**  
**thefocusgroup.com**