

Case Statements

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Afternoon Session

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Case Terminology

Case for Support: All the reasons why someone should contribute to the cause; the rationale for fundraising

Case Statement (Internal Case): A written document that contains all of the information needed to communicate the case for support. In any and all forms, it is concise and cogent, demonstrates success, is targeted to a specific audience, describes how the philanthropy will solve the problem, is compelling/urgent/relevant/realistic, and is built on the future.

Case Communications: (External Case): Written and verbal communications that tie the internal and external information together to position the organization for development; shows how philanthropy addresses social issues and solves problems that concern the donor community.

Uses for Case Statements

- Gets all constituents “on the same page” and allows for consistent messaging
- Becomes the backbone on any grant proposal, direct mail letter, or speech to a crowd
- Helps tie the various elements of your organization to fundraising

Eight Essential Elements of a Case Statement:

- 1. The title:** develop the theme and the tone of the case statement
- 2. Grabbing the reader:** develop a “hook” in the first few paragraphs -- compelling quotes often work well here
- 3. The irrefutable case:** describe the need and urgency for the program, and the positive impacts that will result from implementing the program
- 4. Distinguish your organization from others:** describe how your organization is uniquely well-positioned to meet the need

Eight Essential Elements of a Case Statement (continued):

5. **Waving the flag:** describe the history, mission, and vision of the organization
6. **Reinforcing the urgency:** remind the reader of how pressing the need is and what will happen if nothing is done
7. **Making it happen:** describe what will be required financially to meet the need
8. **The benediction:** provide the closing and final blessing to the program, reinforcing the theme and focusing on hope

Sources: The Nonprofit Times and Jerold Panas, *Making the Case*

Key Questions Answered by a Case Statement:

1. What is the need?
2. What evidence is there that this is a pressing need?
3. How is your organization uniquely qualified to tackle this need?
4. What will be the benefits of your action?
5. What are the negative consequences if you fail?

Source: *The Influential Fundraiser* by Bernard Ross and Clare Segal.

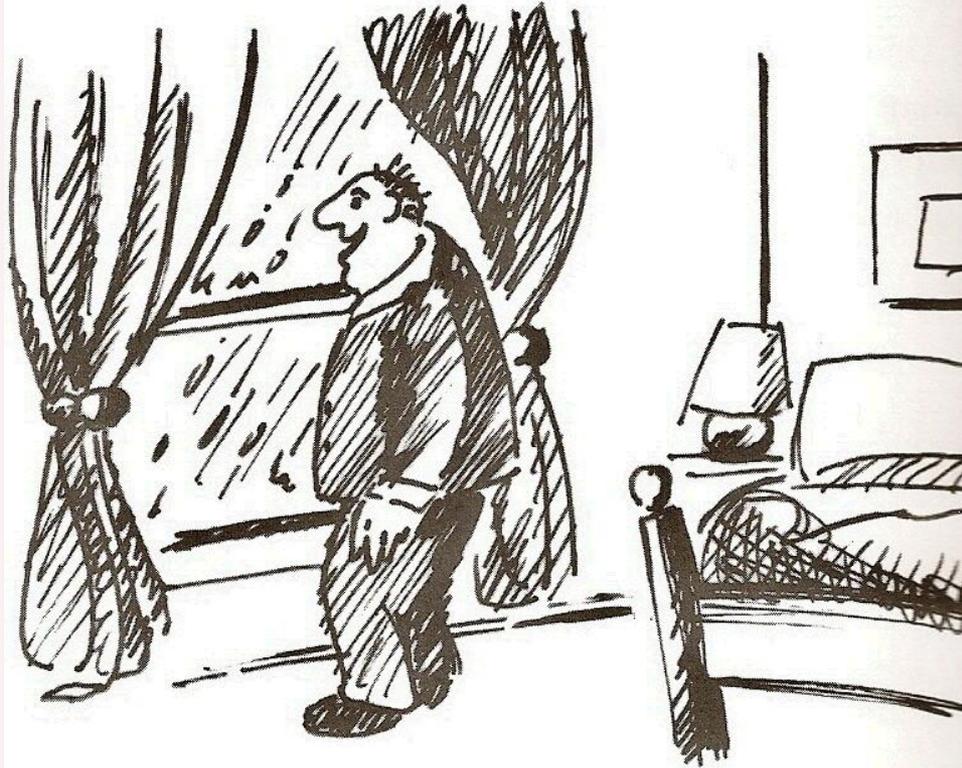
How do we go about creating a case statement?

Case Statement Component Checklist:

- Mission and vision statements
- Strategic plan
- Program descriptions
- Program goals & objectives
- Financial projections
- Staff and board info
- Evaluation tools and targets
- Historical info

Who should be interviewed when writing a case statement?

- Program staff
- Board members
- Volunteers
- Donors
- Nonprofit experts
- Business representatives
- People who know nothing about you



“Wow! What a glorious day to begin writing a Case Statement.”

Questions?