MajorGiftsMT

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What does a "Case Statement" accomplish?

I'M WRITING ONE FOR A CLIENT. They are not the easiest thing to write and I'm experiencing a little writer's block. So I thought, well I can explain why a case statement can be useful for an organization and by so doing get myself primed for the job.

Inherent in any fund raising effort is a case whether or not there is a prepared case statement. The case answers the question - *Why should I give you this money and why should I give it now*. A case statement serves to answer the question in a thoughtful way and organizes information in such a manner as to prepare an advocate to address any issue that may arise in conversation with the constituent.

Case statements and campaign brochures often are confused. They are not the same. One creates the latter after having written the case statement. Many organizations today heading into a capital campaign or special gifts effort go straight to the campaign brochure and skip the case statement writing process. People outside of your organization normally don't see the case statement. It's packed full of information, numbers, stories about service recipients, charts and graphs. More information than could be included in a single brochure.

Photo | Patrick Sheehy | near Hyalite Reservoir

WHY BOTHER WITH A CASE STATEMENT? The idea is to make it so one needs to look no farther when seeking information for a presentation, a proposal or a brochure. Everything is collected in one place. So let's get down to what goes into your case statement. Here is a list:

1. **Who are you guys?** Start out with a short history of your organization. How was it founded, by whom, and why. What "problem" was your non profit created to address? Over time, of course, your mission has evolved. Maybe even changed to something altogether new. This allows you to explain how you got to where you are today. Establish a historical context that serves to illustrate the fact that your non profit has been an intergral part of a larger community for some period of time. You can use this space to explore the personalities of your founders and early leaders and show the ways in which their values have become embedded in the personality of the organization.
2. **Why are you here today?** If you didn't cover it adequately above, you can use this section to explain what your organization is doing now. The number of people you serve. Describe some important achievements over time. Statistics that illustrate the impact your non profit is having on the community. You are putting forth the evidence. Exhibit A and Exhibit B.
3. **What is the need?** If this document is covering the overall fund raising need of your non profit then you describe the problems your organization is seeking to address today. If this is a *special gifts* effort designed to address a particular problem, then the focus may move quickly to that specific need. Through these words you want your constituent to understand how you came to this point of needing to ask them for their help. Make it all sound doable. Fund raising always flows from a practical situation. It is a business proposition.
4. **How do you know a need exists?** Look out into the community you serve and explain how you came to the conclusion that this problem requires special attention. The case for raising money must always reduce to the needs of your service recipients. If your soup kitchen needs a new kitchen, how is that going to benefit the folks you're serving? Overcrowded working conditions for your staff might bring out some violins but it doesn't speak to mission. There is always a way to tie the problem you need to address to the needs of the people you're serving. The Case Statement explains how.
5. **Why are you the guys to do something about it?** The answer to that question might seem obvious. If that's true, all the better for the message. So drive the point home. Lay out the evidence here that shows why your non profit is uniquely qualified to solve the problem.
6. **Can you describe how things will improve because you went after this problem?** In earlier sections you have explained how you got here and why you are here today. Here you are addressing the specific problem that can be solved with the help of philanthropy. If the fund raising effort relates to the overall mission of your organization, you can explain how this specific cycle of fund raising is going to have an impact.
7. **If you fail, what then?** This is touchy stuff. It's never comfortable talking about prospective failure. So the message has to be couched in terms of the philanthropic marketplace. After all, not all ideas are going to attract investment. So you don't want to be saying things such as, "we'll have to close our doors forever." In weighing this opportunity prospective donors need to have a handle on the consequences of doing nothing. Those consequences should not be described in emotional terms. Just let facts tell the story.

8. **What else?** Even though the case statement is an internal document there is nothing wrong with including some photographs of your organization doing what it does so well. Side bars containing testimonials, case histories, stories about individuals, lives changed, the community improved. You want those things available so that you and your advocates do not have to go scrounging for all of that 15 minutes before you have to go and speak to the Lions Club. You want to include enough varied content of this kind that someone who comes to the Lions Club might have a chance of hearing something different when she shows up at Eastern Star. You also can inventory the communications resources you have ready to go, maybe sitting on a file server waiting to be dragged onto a thumb drive.

Whew! does that sound like a lot? This is one of the reasons case statements aren't written so much as they used to. Personally I think it's a mistake to weigh down any one printed piece with the responsibility of telling your entire campaign story. Then you go and print 2,000 copies, there's a nice photo of your CEO on page two, and what's bound to happen then? You guessed it. Some prominent person described in your expensive piece leaves the scene. Ooooh .... can you hear finger nails being dragged across a blackboard? I'm dating myself, right?

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