



## CREATING A CASE STATEMENT

A Case Statement is the first document that you will need to develop for your non-profit strategy, but it is always a work in progress as your project develops. It is the single most important document because all other marketing and fundraising documentation will be developed from your Case Statement. 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. The Case Statement is a dynamic document that includes your Statement of Purpose, Vision Statement and Mission Statement and inspires people to join with you to meet your goals and objectives. From a donor's perspective, organizations don't have needs, people do. While you may view your project or organization as needing funds to keep providing services, donors perceive your organization as needing funds so that you can help more people or help them more effectively. The cause is more important than the structure. Donors also need to believe in you and what you can do. If donors do not connect with you personally, they will probably not connect with the organization and probably not choose to support your project.

Write your Case Statement as if you are standing in the shoes of the donor trying to understand what your project or organization wants to do, make it a simple, compelling and believable call to action. Be careful about making assumptions as to what your donors know about the cause or how best to address it. A good Case Statement is the starting point for any conversation with potential donors. In just a few pages the Case Statement should give you the information to connect donors with the Mission and Vision and build commitment to the organization's goals. It is only when a donor embraces you and your cause that they will start to give consistently to your organization. A good Case Statement should be inspirational and give both you and your project credibility.

### WHERE TO BEGIN:

**The Formal Case Statement.** The formal case statement states all the reasons for supporting a particular project or organization. This is a work in progress and should be updated regularly. It should become your backroom document that answers the important questions around your project for use in a variety of different contexts. Typically, this document is about 5-6 pages long when fully developed. You may not be able to answer all of the questions at the beginning of your project, but you should seek to answer them as your project matures. It answers, with brevity, all 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 – testimonials or anecdotal true-life experiences
  3. What needs confront the people served by the organization?
    - What pressing problems does the organization address?
    - What challenges do 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?
  5. What are the goals for the future?
    - What are the program financial, facility, technology, administrative, governance, and human resource goals for the project
    - How will those in need be served better?
  6. How will the donor's investment be used?
    - Why is the fundraising campaign being conducted?
    - What are the project's key budget items?
    - How do these expenditures relate to the project's mission and services to people in need?
    - What specific items, if funded, would help your project move ahead more quickly or solve problems more effectively and efficiently?
  7. How will the donor's involvement be acknowledged?
    - Describe your "thank you" process
    - Describe the intangible benefit the donor receives by this philanthropic investment

**Statement of Purpose.** From your Case Statement you should put together a comprehensive, yet simply stated, Statement of Purpose which clearly defines what your organization is all about. It should be short, concise and "Wordsmithed" to be the basic description of why you exist and why the world will be a better place with your project or organization in operation. The Statement of Purpose should be no more than 1-2 pages that uses bullet points to highlight the most important topics and/or programs. Think Super Bowl Ad! Think elevator speech!

A good Purpose Statement tells a compelling story that answers 4 basic questions:

1. **Why this need?** What is the problem or need and why does it need to be addressed?
2. **Why this way?** What vital services do we offer to meet the need?
3. **Why us?** Why are we uniquely qualified to meet the need?
4. **Why now?** What is the urgency to respond and what will be done with their support?

**Vision Statement.** If your organization were functioning at its highest capacity, what would it look like? To put it another way, "what do you see when you close your eyes and dream about what could be the impact of your project". What do you want to be "known for" when people

think about your project? This is what gets you up in the morning!

**Mission Statement.** Your Purpose Statement should also be able to be condensed down to a slogan, hashtag or key phrase, nine words or less, that identifies and symbolizes who you are and simply states your objective -- this is your Mission Statement. “*To boldly go where no man has gone before!*” “*Taking your Vision to the World!*” Coupled with your project name, this will be what makes you memorable.