

Telling your story: the case statement

What is a case statement?

- “Why you do what you do and what the results are...not what you do and how you do it.”
(Tom Ahern, ABC, Ahern Communications)
- “An expression of the case, or a clear, compelling statement of all the reasons why anyone should consider making a contribution in support of or to advance the cause.”
(Harold J. Seymour, *Designs for Fundraising*)
- “Aim high, provide perspective, arouse a sense of history and continuity, convey a feeling of importance, relevance and urgency, and have whatever stuff is needed to warm the heart and stir the mind.” (Ted B. Bayley, ACFRE, *Fund Raiser’s Guide to Successful Campaigns*)

The case statement (case for support) serves as your organization’s communications document, targeted to a particular audience, in order to raise money. You communicate the community need / opportunity and your organization’s response and merits. You explain the benefits to the donor in order to stimulate a gift in return. **Information to write case statement includes:** history and track record; strategic plan; community needs and trends.

Tell your story with personal stories – about real people! Speak from the heart. Use “you” a lot. Engage the listener. Yes, add in some facts also. But facts should never dominate!

In summary, the case statement answers the most compelling questions about your organization

1. Who are you?
2. Why do you exist?
3. What is distinctive about you?
4. What is it that you want to accomplish and why does that matter?
5. How do you intend to accomplish it?
6. How will you hold yourself accountable?

Resources to help you develop your case for support / case statement

See Joyaux’ *Strategic Fund Development: Building Profitable Relationships That Last* For tips about how to create your case statement. The book also talks about nurturing philanthropic relationships.

Read Tom Ahern’s *Love Thy Reader* to learn about how to write better. Get a copy on the following websites: www.aherncomm.com or www.simonejoyaux.com / Resource / Free Library / Fund Development.

Better yet, get Tom’s book *The Mercifully Brief Real World Guide to Raising More Money Through Donor Newsletters Than You Ever Thought Possible*. Tom Ahern, ABC, Ahern Communications is one of North America’s leading experts on fundraising communications, including case statements, donor newsletters, and communications plan. Keep your eyes open for Tom’s next book from Emerson & Church Publishers, also about donor communications.

And, Joyaux and Ahern are co-authoring a book – probably for release sometime in 2007 -- with the working title of *Nonprofit Fundraising Communications: A Practical and Profitable Approach*.

Your case statement should:

- Reflect your organization's planning (e.g. mission, goals and strategies to achieve goals) and an understanding of your constituents' needs and motivations.

A case statement should be brief, compelling and demonstrate success. The case statement is targeted to the interests and motivations of a specific audience and describes how the donor's investment will solve a problem or meet a community need or opportunity.

Key information to include in your case statement:

1. The problem (or opportunity) to be addressed
 - Talk about community need. Talk about the people who need and want your service.
2. Trends affecting the problem (or opportunity)
 - Demonstrate your knowledge and insight. What is happening in the world and your community, which has produced this problem and what is happening now (and what do you anticipate happening in the future.)?
3. Your response to the problem (or opportunity)
 - How does/will your organization respond to the community problem or opportunity. How will you respond to the trends?
4. Your mission
 - Now is the time to weave in your mission. You exist (your mission) because you wish to respond to community situations. Explain how your response to this particular community situation fits in with your overall mission. (Please don't just reprint your mission statement!)
5. Your history, track record and marketplace position
 - Explain why you are the right organization to respond to this community situation. Talk about your track record. Demonstrate why the prospective donor should believe that giving money to your organization is a sound investment. Make sure you position your organization within the marketplace. How are you different than other organization doing the same or similar work? Talk about collaboration.
6. Goals, strategies and objectives
 - Provide detail about how you will respond to the community situation. What, specifically, are you going to do? Why? When?
7. Organizational resources
 - Justify, prove that you have the resources necessary to address this situation. Describe your staff, professional expertise, volunteer structure, operations, and so forth. Talk about money. How do you currently finance your organization? How do you propose to finance this new activity? What kind of money is necessary? How will you raise the money and who is helping you raise the money.
8. Accountability and evaluation
 - You must assure the prospective donor that you will comply with all relevance regulations and laws, and that you are good organization, its programs and finances. Also describe how you evaluate program and institutional health.
9. Future plans for your organization
 - Present your future organization goals and activities that will continue to help the community address the situation in the future.
10. Role of the prospective donor
 - Engage the prospective donor. Describe how a prospective donor might participate in addressing the community problem or opportunity. Talk about how you can help the prospective donor achieve his or her own goals and dreams. Describe donor acknowledgment and recognition opportunities. Focus on target audiences and the key messages for each audience.