

# Case Statements

*The case statement serves as an important tool in preparing for a giving campaign. The resulting document should provide compelling justification to support your organization's efforts with key donors and trusted board advisers asked to review and develop the case statement together with lead staff. This resource shares six ways to strengthen any case statement.*

## MAKING YOUR CASE MORE COMPELLING

- 1. Illustrate your organization's strength and ability to forge ahead with confidence.** Donors want reassurance. Do you have a history of balanced budgets? A growing endowment? Backstopped by a larger sheltering organization? Have you followed through on past plans? Highlight these items as indicators you are poised for future success.
- 2. Create a great strategic plan.** Invest in making an eye-catching long-term strategic plan, something to clearly communicate your organization's intent to grow and make significant achievements in your community.
- 3. Tie your organization's future to quantifiable objectives.** It's not "We want to build," "We hope to grow" ... but rather "We will do X," and here are the quantifiable outcomes we think commensurate with success, and here's how we plan to get there.
- 4. Spell out how your long-term plans relate to your mission and a difference their fulfillment means for the lives of those you serve.** You must tie your work to impact on actual people. Ideas do matter, but connecting those dots is very difficult in a case statement. Focus on the people served and what they take away from your services.
- 5. Paint a clear picture of how gift revenue will be used.** Every donor wants to see him/herself as part of the overall project – a partner in the game. Prospects are much more likely to invest if they fully understand your plans.
- 6. Don't hesitate to share the consequence of *not* fulfilling your plans.** While the overall theme of any case statement should be positive, it is acceptable to convey what will happen (or not happen) if your plans are not fully realized. This distinction adds urgency to the need for your campaign.

A case statement in and of itself will not invoke major gifts. It will, however, capture the attention of would-be donors and play a key role in the solicitation process.