

Making the Case

Why should an individual, organization, corporation or foundation support your cause?

I. Purpose of a Case

A. The Case should do more than announce a fundraising goal. It should:

- State the case for the institution's aims, purposes and mission
- Present the case for current programs
- Show how new programs will enrich and benefit the lives of many
- Dramatically show the institution's impact on the community economically, socially, artistically, spiritually and/or historically for today and tomorrow

B. The Case content should cover subjects:

- Organization's needs
- Strategies and task plans
- Staff
- The cause
- Budget
- Goals
- Financial History
- Facilities
- Mission
- Objectives

C. The Case Usually has a particular focus

- Unrestricted operating support.
- Restricted gifts for operations
- Restricted gifts for special needs-capital, endowment or otherwise

II. What is a Case Statement

A case statement is a written version of the case for a specific constituency or campaign. A specific, written case statement is derived from the institution's overall case. The specific case statement should state:

A. The institution's services, programs, and objectives

B. How the goals of the fundraising program support the institution.

C. Ways in which the institution will remain significantly productive in the next decade

- D. The difference it would make if a donor supported the cause**
- E. What the institution must do to improve or change its activities and aims, and why the institution is valuable to society.**

III. Importance of a Case Statement

Preparation of the case statement is a requisite to success in every aspect of an institution's total development program:

- Annual giving
- Capital giving
- Planned giving

IV. Writing the Case Statement

- A. Securing feedback and creating ownership.**
- B. Recruiting volunteer leadership**
- C. Testing the Market**
- D. Forming a basis for case materials**

- Website
- Brochures
- Foundation Proposals
- Appeal letters
- Campaign prospectus
- Press releases
- Newsletter articles
- Speeches
- One-on-one presentations to individuals

V. Adapting the Case for Your Market Segments

- A. Adapting the case to constituent groups**
- B. Grouping constituents**

VI. Preparing the Case Statement

- Collect information about institution and long-range plans
- Talk to administrators, staff, trustees, present and potential donors
- Understand the audience for which it is written
- Obtain consensus

