

## Creating a Case Statement

A case statement is the first document that you will need to develop for your non-profit strategy, but it can change 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 are less likely to give. The case statement is a dynamic document that includes your statement of purpose, vision statement and mission statement. It inspires people to join with you to meet your goals and objectives.

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. 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. It is only when a donor embraces you and your cause that they will start to give consistently to your organization.

### WHERE TO BEGIN:

**The Formal Case Statement.** The formal case statement states all the reasons to support a particular project or organization. The case statement should be updated routinely. Typically, this document is about 5-6 pages long when fully developed. At first, you may not be able to answer all the questions, but as the project matures, you will be able to answer all the questions. The case statement will answer the following with brevity:

1. Organization History
  - Founded when and by whom
  - Major accomplishments
  - Milestones
2. Whom does the organization serve?
  - Demographic information
  - Testimonial or anecdote of a person who benefited from the organization
3. What needs confront the people served by the organization?
  - What problems does the organization address?
  - What challenges do the people served face?
4. How does the organization address these challenges?
  - What programs do the organization offer?
  - What services are provided?

5. What are the goals for the future?
  - What are the financial, facility, technology, administrative, governance, and HR goals for the project?
6. How will the donors' investments be used?
  - Why is the fundraising being conducted?
  - What are the projects key budget items?
  - How do these expenditures relate to the project's mission?
  - What specific items would help your project move ahead more quickly or solve problems more effectively and efficiently?
7. How will donor's involvement be acknowledged?
  - Describe your gratitude process.
  - Describe the intangible benefit the donor receives by this investment.

### **Statement of Purpose**

From your case statement, you should put together a comprehensive statement of purpose that clearly defines what your organization is all about. It should be short concise, and grammatically correct. The statement of purpose should be no more than 1-2 pages that uses bullet points to highlight the most important topics and programs.

A good purpose statement tells a compelling story that answers 4 basic questions:

- **Why is the need?** What is the problem or need, and why does it need to be addressed?
- **Why this way?** What vital services do we offer to meet the need?
- **Why us?** Why are we uniquely qualified to meet the need?
- **Why now?** What is the urgency to respond, and what will be their support?

### **Vision Statement**

If your organization were functioning at its highest capacity, what would it look like? What do you want your project to be known for?

### **Mission Statement**

A slogan or key phrase, nine words or less, that identifies and symbolizes your project's objective.