



MAKING A CASE STATEMENT THAT WORKS FOR YOUR ORGANIZATION

One of the fundamental truths in fundraising is not to reinvent the wheel but to beg or borrow what has been successful for others. Certainly, this is true when it comes to the value of case statements.

A good case statement is one of the most important tools your nonprofit can have in seeking outside funding. It takes time and effort to produce a good case statement but the investment is well spent because it serves as your chief tool in fundraising and is the foundation document from which all other publications must be derived. It needs to grab a prospective donor's attention, and then offer a solid reason for investing in your organization.

In simplest terms a case statement **answers seven questions**:

- (Introduction) What is the problem and/or crisis that your organization is addressing?
- Who is your organization?
- Why us or why is your organization uniquely qualified to address the problem and/or crisis?
- What is your plan of action?
- What is it going to cost (including a budget)?
- What does your organization want the potential donor to fund or to do?
- Why now or what happens if this effort is funded, and what difference will it make if it is not funded?

Packaging of case statements:

- The packaging of the statement should match the level of the gift being requested. For example, if you are asking for \$50, a simple letter may suffice; but your major donors and your potentially major donors warrant the case statement.
- If you are launching a major fund drive, an expensive bound document may be needed; but, if the statement is planned to be used over a long period of time, a digital document that can be printed in small quantities and at a reasonable price may be more useful. In either case, avoid including information that will be quickly out-of-date.
- Include carefully chosen visuals. Building plans, graphs and charts, photos of people who have/will benefit from your services—these all can be helpful in helping people share in your vision.
- Be sure that clear contact information is provided.

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Nehemiah Communications is a company that specializes in growing nonprofit organizations and small businesses by providing customized communications and operational services.

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Putting the case statement to work:

Case statements should be given out as part of a personal contact with prospective major donors whenever possible so that the various sections of the case statement can be emphasized to match a donor's interest. A follow-up letter after the visit can provide an opportunity to highlight whatever the prospects' particular interest may be. When it is not possible to meet with a potential major donor, an alternative approach is to send out the case statement with a covering letter that points out how the work of your organization relates to known interests of the prospective donor and that requests a meeting.