

Crafting Your Compelling Case Statement

"Why should I care enough to give?"

This simple question, asked by your donors and prospective donors in a variety of ways, is the most fundamental and important question that you and your organization must address to encourage charitable giving. It is also the question that your case statement can take the lead on addressing in the most clear, concise, and compelling way. In fact, the deftness and fullness with which your case statement addresses this question goes a long way toward securing the charitable resources your organization needs to serve more and serve better.

While most development leaders understand the importance of the case statement, a much smaller percentage fully grasp the process of crafting this document effectively. By understanding a few principles and taking the time to gather the right information, you can craft a case statement which will encourage your donors to fulfill their own philanthropic imperatives through your organization's good work. Making that connection—the connection between your organization's aims and your donors' own desire to make an impact—is one of the key hallmarks of an effective and compelling case statement.

This edition of the [Bulletin on Advancement](#) is focused on helping you successfully craft or recraft your case statement. Your current donors care about your organization and want to know how increasing their charitable investment will make a bigger difference. Prospective donors need to better understand how their support will align with their values and make an important impact. An effective case statement engages both audiences.

What is a Case Statement?

The Association of Fundraising Professionals (AFP) defines the case statement as:

"The reasons why an organization both needs and merits philanthropic support, usually by outlining the organization's programs, current needs, and plans."

In defining a case statement, though, keep in mind that a *case statement* is distinct from a *case for support*.

While these two phrases are sometimes used interchangeably, they, in fact, represent two interrelated, but distinct documents.

A *case for support* refers to the broader, written document that outlines everything anyone should know about your organization, the community needs you serve, and why charitable support and partnerships are needed. The *case for support* is an internal management document which is developed by leadership, staff and key volunteers. Based on the mission, vision, and strategic plan of the organization, this document helps clarify the goals and objectives of the organization, especially (but not exclusively) those being supported through charitable giving or sponsorship dollars. This in-depth, broader *case for support* serves as the primary source document for the *case statement*.

Your *case statement* is created from the *case for support*. Unlike your *case for support*, though, your *case statement* is created for external audiences, such as donors and prospective donors. The *case statement* translates the longer, more comprehensive *case for support* into more concise and compelling messages and visuals. Whether in the form of print, video, or other digital content, your *case statement* should educate others on why the organization is raising funds, how the funds will be used, and how the organization's priorities further the mission and vision. Ultimately, your *case statement* should inspire others to want to be more involved.

This distinction between the purpose of the case for support and the case statement is important because an effective case statement will be rooted in a broader organizational context. Attempting to craft a case statement without a case for support is akin to attempting to write a research paper without a thoughtful outline. When taken together, these two documents hold the promise to position your organization most favorably with the bulk of your donors and prospective donors.

Another important clarification regarding case statements is that they are useful for more than campaigns. Indeed, taking the time to craft your organization's annual giving case statement will help identify those messages and visuals which best encourage generous annual support. In fact, whether or not your organization is in a campaign, our firm recommends that you consistently update and utilize your annual giving case statement.

Components of a Compelling Case Statement

When effectively organized and presented, the components—or sections—of a case statement will contribute to making the case more compelling, and therefore more effective.

Introduction or Opening Letter

Typically, the executive director or chief executive officer of your organization utilizes this space to summarize the case statement and enthusiastically paint the picture of an inspirational future vision. In addition to summarizing the messages of the case statement which will follow, this opening also personally affirms, from the highest position within the organization, that the priorities represented in the case statement have full and complete organizational support. What the reader or viewer is being introduced to, in other words, is not simply a collection of fundraising priorities that may change in the weeks and months ahead because of inadequate planning. Instead, this introduction communicates that the key priorities presented in the case statement are the ones which will occupy the organization's focus for the foreseeable future.

Mission and History of Effectiveness

Focusing a donor's attention on your purpose or mission is essential to communicating your case statement effectively. It is important to remember that donors do not give to your organization, they give through your organization. Your mission is the framing statement which should communicate the sense that the purpose of your organization is highly valuable to the broader world. One approach to framing your mission in this broader way is to address these powerful questions through your case statement:

- ◆ *What would be the consequences for our world if our organization was no longer able to fulfill its mission?*
- ◆ *If our organization did not currently exist, why would we start it?*

In addition to communicating the importance of the mission to your donors and prospective donors, framing the highpoints of your organization's history is a helpful reminder that you know how to set and achieve ambitious goals.

Sharing your organization's history introduces prospective donors to your legacy of effectiveness while also reminding current donors why they have given previously. This is the area of your case statement in which you should let your bona fides shine and identify other important, distinctive organizational characteristics.

A Vision and Strategic Priorities that Meet Needs

While your mission statement should describe your organization's purpose, your vision statement should define a future where broader individual, communal, and/or societal needs are met. In his 1986 classic, *Fund Raising: The Guide to Raising Money From Private Sources*, Thomas Broce writes, "Donors give gifts to meet objectives, not simply to give money away" (p.19). A strong case statement, therefore, is grounded in your organization's strategic priorities and finds its intellectual heritage in your organizational vision and strategic plan.

Your strategic priorities should clearly describe the initiatives you are planning which, when completed, will help you achieve your vision. These are important distinctions – your organizational vision and strategic priorities should focus on the needs you will meet and not the needs you have. An example of two ways to frame the same organizational priority will help amplify this point:

Organizational Priority Statement #1

"Our organization's facility needs are paramount. To provide the administrative support needed to serve our community well, we know that expanding and updating our offices will be key. Therefore, we are seeking \$50 million for new construction and renovations of existing spaces."

Organizational Priority Statement #2

"Those we serve deserve an organization that is efficient, effective, and provides a sense of dignity for all. To expand our services to the community and to serve better, we know that having modernized facilities are key. Therefore, we are seeking \$50 million for new construction and renovations of existing spaces."

While the first statement leads with a focus on the organization's needs, the second statement leads with a focus on those it serves.

A strong case statement is focused more on the external or communal needs that are most pressing and salient than it is focused on your organization's own philanthropic priorities and needs. The compelling case seamlessly finds the intersection between how funding your organization's needs simultaneously addresses the needs of your community. It reminds donors that it is not so much about your priorities, as much as it is about what those priorities mean to the people your organization serves.

Your case statement also should include a level of detail about your priorities so that the donor understands what is being presented is more than wishful thinking. You want to showcase designs or artist renderings of facilities, programmatic details, and/or endowment specifics depending on your priorities. Your aim here is to communicate clearly that strategic planning has occurred and that these priorities represent direct ways for the donor to respond to the important needs identified previously.

An Invitation to Give

Finally, a case statement is incomplete without inviting prospective donors to give. Your case statement should conclude with a strong call to action, an invitation that hurtles the donor towards the act of making a gift commitment.

In this section, you want to communicate how the donor with generous impulses becomes the hero of the story. Since your case statement is designed for external audiences, it should directly reflect your donors' own philanthropic imperatives and priorities, as recast through your organization's mission, vision and priorities.

Your aim here should be to make an emotional connection between the donor and the transformational impact her giving will have with others. It is her generosity that matters. She is the difference maker. When a donor acts with generosity, this part of your case statement vividly presents the wonderful outcomes.

Your Case Statement's Compelling Content

Mission Matters

As stated previously, your case statement should be rooted in your organization's purpose or mission. The inspiring narrative you use to describe the relevancy of your mission to the world is always important and, certainly, is critical today. With the Covid-19 pandemic and racial justice issues as societal-shaping experiences, your case statement should share how your organization remains passionately committed to your mission and should convey clearly how your mission matters now more than ever.

Voice and Language Matters

Endeavor to share your organization's case statement in the most personal, human terms, and be mindful of the voice you are using. You will want to steer clear of using the organization's voice which typically includes a focus on your needs, heavy jargon, and references to administrative structures. The organization's voice may sound familiar to you, but it is less accessible to your audience. Instead you want your language to be simple, direct, and easy to understand.

Above all, you will want the language of your case statement to draw the reader in and encourage her to see herself as the hero of the story with the capacity and opportunity to make a difference *through* your organization. You want to write in the voice of "the other." You should position the voices of those you serve to best tell your story. You should invite the reader into that story by using words like "you," "your," "together," and "join," liberally.

Design Matters

The visual appearance and tactile representation (for print) of your case statement can create a positive or negative lasting impression with donors. A thoughtfully designed case that mirrors your organization's brand and design will convey an organized and professional fundraising effort which is supportive of your organization's strategic ambitions.



Especially for case statements delivered in print form, it is important to keep in mind that every component of the document delivers a message. The fonts, the colors, the visuals and design elements, the feel and type of paper used, the physical size of the document – all communicate to the reader. The question for you, of course, is, “what, exactly, are we communicating?”

In general, we advocate for visual and design elements that highlight the personal stories of those your organization serves. For instance, your case statement becomes more compelling with pictures of the faces of those you serve rather than with photographs of buildings and grounds, no matter how picturesque.

Sharing Your Case Statement

Sharing your case statement with colleagues, key donors, and influential volunteers is a helpful way to gain important feedback and refine your presentation. Additionally, sharing your case statement, especially early in a fundraising effort or campaign can be a powerful consensus-building tool. As you share with and seek feedback from colleagues, stakeholders, donors, and prospects, you will not only capture valuable perspectives which will strengthen your document, you also will introduce them to and unite them around your organization’s most significant priorities.

Ask questions about the perceptions others have of the case statement’s design, language choices, pictures and graphics used, and the priorities themselves. In short, ask for feedback on all aspects of your case. This process of sharing and seeking feedback helps build consensus and strengthens relationships that will only accrue positive results for your fundraising over time.

Once you have vetted your document with those who know your organization well, you are ready to share your case statement more widely with your donors and prospective donors. As compelling as your case statement might be, it should not be considered as stand-alone fundraising collateral, but rather as an important element in a broader fundraising and communication strategy. Typically, your case statement should not be distributed to donors and prospects by itself. It is not the solicitation piece for gifts, it is your aid to invite more meaningful gifts.

An effective case statement will provide a visual dimension to a personal face-to-face or virtual visit with a donor or prospective donor. Additionally, it should serve as the basis for all development materials used across your communication channels: campaign or development website, major gift proposals, brochures, impact reports, social media content, email and direct mail, and other collateral. Your case statement will contain the design standards from which all other materials will draw their inspiration.

Finally, your case statement should never be weighed down with the responsibility of communicating every detail of your organization’s efforts and plans. Instead, the case statement should be viewed as a guide to assist the development professional in sharing the organization’s plans. Ultimately, it is the development professional who adds the vibrant and enthusiastic commentary which aligns the case statement with each donor’s personal interests and values.

Inspiring the Best Possible Gifts

A compelling case statement should help inspire a donor’s best and highest gift. In its design and presentation, the effective case statement bestows the gift of agency to the donor and provides a compelling story for how their generosity will make a dramatic and positive impact on the lives the organization serves. The essence of a compelling case lies in its ability to encourage donors to visualize their own power to transform their communities for the better by acting generously.

Administrators and development leaders spend most of their waking hours focused on the needs of the organization. “If only we had a new facility that could accommodate our services better.” Or “we really need more money for this new program.” These are the “needs” that are seen and felt each day. It is understandable, then, that many administrative leaders will think about communicating priorities from the perspective of, “here are our needs, let’s go raise some money!”

But donors need something else from you. They need to feel as though their giving will help your organization achieve something bigger, something important, something that aligns with their values and interests. They need to understand **why** you are raising the money and **why** their support matters. It is only in the acknowledgment of these needs that your case statement will be compelling.