

How to Write a Great Case Statement

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What is a Case Statement?

A case statement is a concise document that clearly explains what need your organization seeks to meet, how you have and plan to meet that need, and what you could achieve with additional resources.

Why Write a Case Statement?

A clear case statement ensures that you and your board convey a consistent message when speaking to the public, developing educational materials, working with the press, and fundraising.

What do you need?

TIME...this is not the place to cut corners!

Ability to update the statement regularly

Ability to tailor for your audience

Two types of case statements/case for support:

1. Internal- Longer and more comprehensive (typically 5-10 pages). The internal case statement will serve as the foundation for promotional efforts such as creating brochures, writing grant proposals, and submitting press releases. It details your organization's mission, vision, history, and reason for seeking funds.

2. External- Draws from the internal case statement and tailored for a particular audience. Used for letters, proposals, speeches, reports, brochures, and staff/board training. Typically, no longer than one page.

Internal case statement outline

*Note: The model presented here should give you a framework to get started and ideas for elements you should consider. This is not meant to be an exhaustive list!

1. Mission: Why the organization exists

2. Goals: What your organization hopes to accomplish

3. Objectives: How you can accomplish the goals

4. History: Which objectives you have already accomplished and what successes you have had (track record)

5. Structure: How the group is organized and governed (Who are its officers? Do you have members?)

6. Fundraising: How the organization plans for its future and manages its finances appropriately

External case statement outline

*Note: The model presented here should give you a framework to get started and ideas for elements you should consider. This is not meant to be an exhaustive list!

1. History/The story

-Describe your watershed. What makes it special?

2. Challenge/ Ramifications

-Describe any challenges/threats your watershed faces.

-What could be the impact if these challenges are unmet? (unsafe drinking water, impact on habitat, loss of biodiversity, loss of aesthetic values, etc.)

3. Who you are and what you do

-How did your organization begin? What is its mission/vision? (Note: It may be important here to say something about the organizational structure and work philosophy of your group, particularly for businesses that want to see your “business model”)

-What makes your organization unique?

-How large is your organization and how many does it serve?

-What are your primary programs, services, or areas of focus? In other words, how does your organization work to meet the challenge?

4. Results

- What results has your organization achieved thus far?

- What are your organization’s future plans? What are the goal and the values you support?

5. The Ask/Contact Information

-Why are you asking for money? What is the cost of doing your work?

-If this is a special campaign, how much do you hope to raise? How will the money be spent and what are the long term impacts? How will the donor make a difference?

-How can people contact you to donate?

Case Statement Guideline: Sources

Foundation Center's "Introduction to Fundraising Planning" seminar (January 11, 2008)

Fundraising Basics: A Complete Guide, Second Edition by Barbara Cicone and Jeanne Jacob (2005)

Juniata Clean Water Partnership's *Juniata Watershed Journal* v2n2, (Winter 2001)

"Making the Case" by Connie Hughes, *EarthDreams*

River Network's *River Fundraising Alert*, v3n2 (1996)

Tech Soup's "Technology Funding Planner Worksheet #2: Building a Great Case Statement"
(Developed for TechSoup by Mark Osten of Summit Collaborative)