

Creating Your Annual Case Statement

Your Case for Support is...

- The official story of your organization, the cause and how you address it
- The basis for all fundraising documents, marketing and communication

A Case Statement is...

- An expression of the Case for Support
- A brief, readable, and compelling presentation piece
- An essential fundraising and marketing tool
- Not a proposal, but the primary element of a proposal

Case for Support:
The reasons why an organization both needs and merits philanthropic support, usually by outlining the organization's programs, current needs and plans

Case Statement:
A presentation that sets forth the case for support.

Taking the time to write an annual Case Statement is an essential first step to effective fundraising!

Why is an Annual Case Statement Important?

- All fundraising is rooted in demonstrated need
- Serves as a single source for compelling language
- Describes on-going programs as more than just "general operating support"
- Justifies organization's mission and purpose to donors
- Demonstrates the effects of your mission
- Lets donors understand how they can help

Writing Your Case Statement

1. Gather Resources
2. Create an Outline
3. Draft
4. Revision, Approval and Testing

Gather Resources before you begin:

- Mission and Vision Statements
- Goals and Objectives
- Strategic Plan
- Annual Report and Audited Financials
- Local and National Hunger Study/ Statistics
- Construction, Renovation or New Program Plans
- Program Statistics
- Board and Staff Bios
- Org. Chart and Job Descriptions
- Fundraising Plans
- Budget

Case Statement Outline

When Writing Your Case:

- Begin broadly, become more specific
- Illustrate human impact
- Inspire, don't just describe
- Tell a story

Executive Summary

- Write this last. "Sell," don't just describe. Convey key points of entire case. What would you say if you had three minutes

Identify Organization and Mission

- Who you are, what you believe, what you do, and how you do it. List your mission statement, goals, and objectives.

Background and History

- Tell the story of founding, list org. milestones and changes in need and services, and demonstrate a long history of success.

The Cause/Need/Problem

- Describe the problem of hunger in America and in your community with facts and examples. Demonstrate urgency without presenting a desperate situation.

Programs and Services

- Explain membership in Feeding America. List and describe your programs and services. Demonstrate unique successful approaches.

Results and Outcomes

- Demonstrate credibility and effectiveness. Measure impact in real terms (meals, pounds, people, families), illustrate impact with client stories.

The Situation Today

- Outline the current situation and any unaddressed or new needs. Create a sense of immediacy and relevance.

Vision for the Future

- Describe current and future plans to address the situation today.

Financial Realities

- Outline the costs associated with each program and any additional unmet needs. Also a good place to highlight organizational efficiency statistics.

Inspirational Closing

- This is the conclusion to your "story". Inspire the reader and offer a specific "call to action."