

Creating a Nonprofit Case Statement

What is a case statement?

A case statement, also known as a case for support, is a simply and specifically written document, of varying lengths, that states the most important facts about an organization, emphasizing why it should be sustained. Case statements can be written to convey support for the overall work of a nonprofit, or can be tailored to a particular program or fundraising campaign. Written for internal as well as external use, the case can also serve as the source document for communications.

A simple and specific document with the most important facts about an organization, emphasizing why it should be sustained.

Why do you need a case statement?

A good case statement is the starting point for any conversation with potential donors. The statement is the best way to make a good first impression. In just a few pages, the case statement should connect the donor with the organization's work and build commitment.

Telling the story

Without a good story, donors don't have reasons to invest.

In the world of fundraising, telling a good story is the first step toward reaching your goals. Without a good story, donors don't have reasons to invest.

The case for support aids in telling the story by answering the following questions as to why your nonprofit deserves support:

- How does this organization meet a critical need?
- Who or what is made better?
- What vital services are offered?
- What is the organization's track record?
- What are future plans?
- How does the nonprofit use its resources?

The formal case statement

As a starting point and to help prepare for future presentations, communications, and situation-specific case casements, it is good to create a comprehensive document that answers the above questions and those listed below.

What is the organization's history?	<ul style="list-style-type: none"> • Founded when and by whom • Major accomplishments • Milestones in the organization's history
Who does the organization serve?	<ul style="list-style-type: none"> • Demographic information • Description of real people served- share testimonials or anecdotal true-life experiences.
What needs confront those served?	<ul style="list-style-type: none"> • What pressing problems does the organization address and how does it know that these problems exist? ie. research, focus groups, community meetings
How does the organization address these challenges?	<ul style="list-style-type: none"> • What programs and services are offered? • How does the nonprofit know that it is providing the right services?
What is the organization's reputation for management?	<ul style="list-style-type: none"> • What evidence can be offered pertaining to the organization's stability and fiscal responsibility? ie. deficit-free operations, positive audit results, accreditations
What are the goals for the future?	<ul style="list-style-type: none"> • These could include program, financial, facility, technology, administrative, governance, human resource and diversity goals? • How will achieving these goals better your service delivery?
How will the donor's investment be used?	<ul style="list-style-type: none"> • Why are funds being raised? • What are the organization's key budget items? • How do these expenditures relate to the organization's mission and services?
How will the donor's involvement be acknowledged?	<ul style="list-style-type: none"> • Describe opportunities and intangible benefits the donor receives through giving

Situation Specific Case Statements

Once you have a formal case statement, it can be modified for a variety of situations.

The formal case statement, usually five to six pages, should be pared down to a one to two pages with bullet points to express the most important topics. This can be used for volunteers or large group presentations.

Some foundations and donors are impressed by lengthy descriptions, but most are not. If they read at all, they are more likely to read a summary of two to three pages.

The case statement can also be transformed into a brochure, PowerPoint presentation, or video as your audience changes. For these items, images and infographics mixed with text can make for compelling pieces.