



## The Fundraising Case

### BASIC CONSIDERATIONS

1. Fundraising starts with commitment to a mission, not with awareness and understanding of financial need.
2. A well-designed Case will be valuable in staff recruitment, as a guide in planning programs, and as a central resource document for all fundraising and public relations activities.
3. A Case is not intended simply to be given or sent to prospects, but to be presented personally. Consequently, the Case must be designed as a presentation tool for the staff and volunteer presenters and not simply as a brochure to be read by prospects.
4. Fundraising without a Case is like running a business without a business plan.

### COMPONENTS

1. Theme
  - a. What is the most succinct phrase to summarize your mission statement?
  - b. Start with a verb and bring out your “niche.” Give donors and prospects a “handle” for knowing and remembering your bottom line.
2. Need
  - a. If your prospects are not individuals served by your organization, a statement of need at the outset of your Case is essential. Describe it graphically and lead up to why your organization is needed.
3. The Mission
  - a. Why is your organization in business?
  - b. Focus on fundamental reasons, on what you are. Focus on your unique qualities, separating your organization from the pack.
4. Lifetime Values
  - a. What are the long-term results you envision for the individuals you serve and the community they represent?
  - b. Describe your organization’s long-term impact on individuals’ lives, the character you’re committed to developing – “the product” of your organization.
5. Program
  - a. What are the programs and activities your organization employs to carry out your mission to achieve your goals?
6. Accomplishments/Impact
  - a. What evidence is there that your program is achieving the goals you’ve set out?



## **Essentials of Development**

A MURDOCK TRUST PROGRAM

- b. Share stories of young people you serve, who have been impacted by your organization, and if appropriate, list objective data demonstrating your impact and accomplishments.
- 7. The Future
  - a. Where is your organization headed over the long-term?
  - b. Paint the vision in broad strokes and related it back to your mission and goals. Make it exciting, but don't exaggerate. Relate it to why you're raising money now, making it clear that by investing in the current development program, your donors are leading the way to fulfilling this future vision.
- 8. Budget
  - a. What is the entity (e.g., campus, area, etc.), the overall goal? When do you need it? What do you need it for? How much do you need for each of the components?
- 9. Gift Plan
  - a. What is your strategy based on your donor list, and how many are already giving at what amounts? List the number of gifts needed at each level starting at the highest on down, including what you have and those you hope to have based on your strategy.
  - b. For gifts at levels above \$100 per month, present in annual terms. At \$100 or less, present as monthly gifts.
- 10. Leadership Profile
  - a. What are the basic facts about your organization? Who are the people your organization serves? Who are the key players leading your organization and programs?