Essentials of Development
The Case Statement

2018-2019
The Case Statement

• The case is different from a glossy brochure; it is a fundraising tool!

• The case statement is never to be used as a stand-alone piece or handed out by the hundreds

• It is a presentation tool used for a specific meeting with a potential donor to talk about your organization
10 Elements of a Case
1. Theme

- It is the main message you are trying to communicate and will be interwoven throughout the pages of your document
2. Need

- What is the need your organization is addressing?
- Expressed in real numbers and real statistics
3. Mission

• Your mission statement is the official statement of why your organization exists and what you’re doing
4. Lifetime Value

• What are the long-term results you are creating for the individuals and communities you serve?
  • Expressed in real life stories of people/communities served
5. Programs

• How you actually carry out your mission, and how your organization directly responds to the need(s) you are addressing
6. Accomplishments/Impact

• What evidence is there that your organization is providing the benefits you have identified?
  • Expressed in testimonials of people you serve who have been impacted by your mission
7. Vision for the Future

• Where are you headed over the long term, and what is the overall vision of your mission?
  • Relate it to why you are raising money now
8. Funding Requirements

• What is the overall financial goal, when do you need it, what do you need it for, and how much do you need for each of the components?
9. Gift Plan

- How many people are needed to give gifts at each level to accomplish the goal based on your actual prospective donors and their capacity to give?

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**TOTAL** $2,200,000
10. Profile on Leadership

• What are the basic facts about your mission, who are the people you serve, and who are the key players leading your organization and programs?

• Include your address, phone/fax numbers, email, and website
Using the Case Statement

• When you prepare for a meeting, ask yourself, “What other information might the person I’m meeting with want to see?” and bring that additional information with you.
• In your meeting, as you are sitting next to the donor and walking them through the case, start by bringing them to the Theme.
• Continue to walk through the case one page at a time, and hone in on the things that are most important to that donor.
Using the Case Statement

• The case can be used vertically and horizontally
  • A horizontal use of the case is the 30,000 foot overview of the organization
  • A vertical use is when you drill into the details in a specific area and focus on something that you know the donor wants to talk about

• When you get to the financial need or budget page – stop.
  • Ask, “Do you have any questions about what we’ve talked about so far, or possibly about the budget?”
Using the Case Statement

• Don’t proceed to the gift plan until you’ve answered their questions about the budget

• When you get to the gift plan:
  • If you’ve indicated to the potential donor that the meeting is not about asking for a gift at that time, then explain that this is how you plan to raise money, and invite them to engage with your organization in some way (visit, volunteer, etc.)
  • If you’ve indicated that you’d like to discuss a gift at the meeting, then ask, “Would you be willing to make a gift in this range?” and then point to a middle box
Using the Case Statement

• Even if you have read the case many times, be sure to present it with enthusiasm!

• Don’t be numb to how awesome your organization is!

• After the meeting, leave the case with the donor to take home with them.
Role Play: Using the Case

- Scenario #1: Using it with a new person
- Scenario #2: Using it to ask for a gift
Thank you.

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