

## The Case Statement

The case statement is a fundamental element of any fundraising campaign. It does for a capital campaign what the membership brochure does for a fundraising program—communicate directly about the needs, the opportunities and the options. It serves to enlist, inspire and motivate donors to invest in the campaign.

Like all good writing, the case statement must be clear, concise and correct. It must also be compelling, persuasive and poetic. It conveys a big vision—puts the big picture in perspective and states the case on why the donor should respond.

The structure of the case statement might try to:

1. Establish an overall **theme**.
2. Define the **outcomes** (goals) and **outputs** (activities).
3. Set a **financial target**.
4. Establish the **time frame** for the campaign.
5. Answer the question "**Why?**" Describes the opportunity and the solution.
6. Convey **urgency** in a "call to action".
7. Define the **distinctive nature** of your organization (which isn't necessarily unique):  
*Mission, organizational history, accomplishments, credibility statements*
8. Describe the **budget**, both for the organization and the project being funded.
9. Describe the **sources of funding**, if clear.
10. Define specific **gift opportunities** (if needed and appropriate).
11. Show as well as tell with strong **graphics**.  
*Photos, maps, diagrams, charts, graphs, timelines, quotes*