

The Case Statement

In fundraising, a primary task is to produce a document which describes in detail the needs which motivated the creation of the organisation, the way these needs will be addressed and the means which the organisation can muster to answer those needs. This document is called the “Case Statement”.

The Case Statement is created primarily for personnel, members of the board and key volunteers. Though not a secret document, it is too lengthy to be distributed to the public. It is upon this document, however, which all other documents, such as brochures, funding requests and letters of solicitation rely on. Anything said or written must be supported by the Case Statement. It is the basis for all communications.

The Case Statement is made up of the following elements :

1. The mission statement which declares why the organisation exists.
2. A description of goals which explains what the organisation hopes to accomplish in the long term – in other words, how the organisation expects to answer the needs expressed in its mission statement.
3. A list of objectives –specific, measurable and time limited – explaining how the goals will be met.
4. A summary of the historical background which demonstrates the competence of the organisation and its ability to meet objectives.
5. A description of the structure of the organisation including members of the board, the tasks of the personnel and all others involved in the organisation (users, donors, business and community leaders...).
6. A budget plan.
7. Financial statements for the last fiscal year and a budget for the current year.

The existence of such a document, used by key persons of the organisation, insures standardization of the information and philosophy disseminated by members of the board, personnel and key volunteers when they communicate with donors and supporters either during conversation, speeches or in letters of solicitation.

The Case must be larger than the Organization – it must address Society at large.

Describes Resources required
Describes Resources available (within the organisation)
Describes Additional Resources needed (reason for the solicitation)

Explains -why donors should give / become member
-how donors can give / become member
-what's in it for donor

The Case Statement is -

prepared by Staff (i.e., by a small, discerning committee)
reviewed / ratified by donors (even by beneficiaries)
approved by the Board

The Case Statement must create -

EXCITEMENT
PROXIMITY
IMMEDIACY (what's happening now and 3-5 years in the future)
MEANING (that donor / member can identify with)

N.B. There must be a transfer of values between donor and recipient.

Pierre Provencher
Director of Training