

Writing a Case Statement

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Case Statement Defined

- A **Case Statement** articulates how an organization will address a dire need.
- The length, format and appearance of a Case Statement varies. However, all types of Case Statements are created for similar purposes.



Mark's Humorous Example



- Old MacDonald's Farm
- Historic site, educational, teaches horticulture
- Launching a new project that teaches youth to grow food they will distribute to the hungry.
- Case will help articulate the many elements of the project in preparation for approaching foundations and major donors.
- Some don't realize the farm is a nonprofit, so **they may have a tough row to hoe.**



Case Statement Benefits

- The project is more likely to work.
- Convince all types of donors to give.
- Make key, internal decisions.
- Deliver consistent information.
- Prepare to answer donor questions.
- Allocate all expenses to projects.

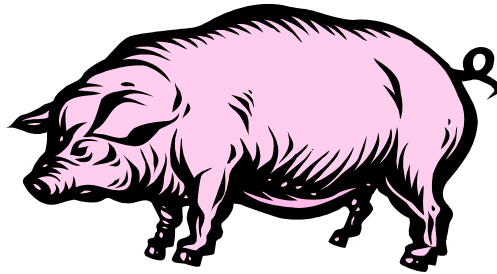


Case Statement Benefits

- Motivate fundraisers.
- A quiver of arguments that enable fundraisers to focus on donor concerns.
- No delays caused by time-consuming, deadline-driven decisions.
- React quickly and efficiently to unanticipated funding opportunities.



What Does It Look Like?

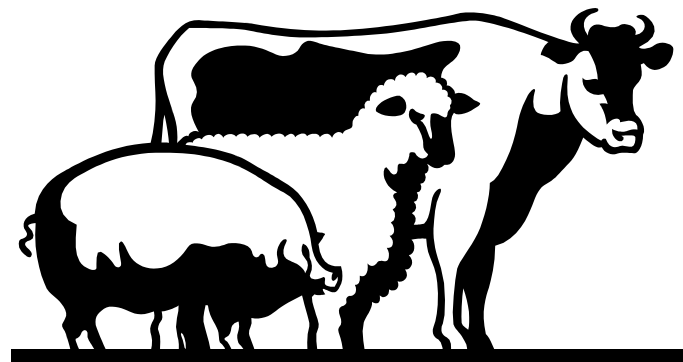


- To write the sort of Case Statement that provides these benefits...
- About 5-8 pages is a good length.
- When the text is completed, you might want to edit or modify it for donors, add charts, photos, maps, etc.



Where Do I Start?

1. **Get your leadership's buy-in.** Explain the benefit of a case statement and the time needed to complete it. It can easily take about 45 hours of your time, spread over 2 months or so.



Where Do I Start?

2. **Before writing, make sure that your leadership agrees on the external need to be addressed.** A need is a condition or situation in which something is required. If organization leaders do not agree on a need that the organization's mission compels it to address, the leadership will never be able to completely agree on an effective solution.



Where Do I Start?



3. **Next, make sure that your leadership agrees on its strategy.** A **strategy** is a plan of action intended to accomplish a specific goal (it is not an objective or task). Nonprofit organizations exist to provide a public benefit (a *strategy* that meets a *need*). When organization leaders disagree on *strategy*, they will not be able to work as a team to implement the best solution.



Case Statement Content

- Part art, part science.
- Are you convinced? Get an objective reader.
- Keep it simple, clear. Use consistent tense.
- Use compelling details, not flowery language.
- Stress key themes, but don't be redundant.
- Be honest and realistic — the need should be the compelling part.



Contact Information



Agency: Old MacDonald's Farm

Project Name: Grow for the Gold

Contact: Sadie MacDonald, Executive Director

Phone: 1 (828) OLD - MACD

Fax: 1 (828) MAC - FAXD

E-mail: sadie@e-l-e-l-o.com


Physical Address: Had-a-Farm Pl., Leicester, NC

Mailing Address: PO 000, Asheville, NC 28801

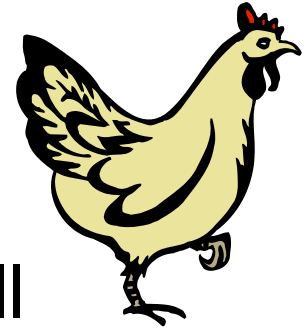
Web site: www.e-l-e-l-o.com



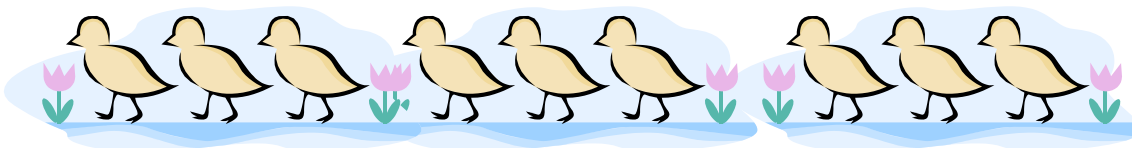
Summary

- Write this LAST.
- “Lead with the need.”
- Include key bits from each section that follows.
- Make it the most compelling section—it may determine whether someone keeps reading.
- Don’t exaggerate. If the truth isn’t enticing enough, your case may need more work.
- Keep it brief. About 1/3 to 1/2 of a page.
- If you aren’t sure whether this, or another part of the case, is interesting enough, read it out loud. 

Background

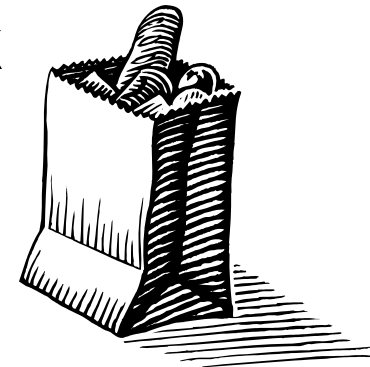


- What **MUST** the reader know up front?
- Set the stage. What do you **WANT** to tell readers?
- Organization’s mission and relevant experience
“Old MacDonald had a farm — then she added educational programs for youth and has sustained them for 30 years.”
- Accomplishments, Regional Characteristics, Environment, Constituents



Needs Statement

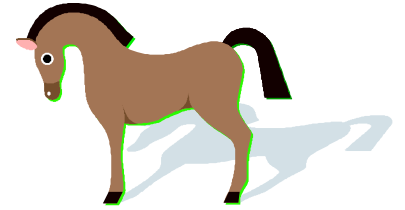
- State each need “thesis” in a single sentence
- The lack of your service is not the need
- Provide objective, relevant evidence of the need
- Give specific examples that tug at the heartstrings
- Quote constituents or authorities
- If the project is local, use local information —
**“Old MacGyver’s Farm closed,
so that 20% of families lost work
and can’t afford groceries.”**



Goals and Objectives

- **Goals** are broad aims that may never be achieved: “**Old MacDonald’s goal is to plant a zucchini here, a zucchini there, so no one goes hungry.**”
- **Objectives** are measurable aims: “**We will plant 2,000 zucchinis this year.**”
- **Outcomes** are measurable results: “**90% of participants will have less hunger due to zucchini.**”
- **Tasks** are short-term “to-dos” that bring you closer to an objective: “**Ms. MacDonald will buy a new power hoe to use to plant zucchini.**”

Methods and Staffing



- Follow a participant through the project
- Use the “flow chart method” to chart the project

First, Old MacDonald will work with DSS to register eligible families to receive the zucchini. Second, the Farm will take its neigh-neighs here, there and everywhere to deliver zucchini to the families. Third, a baaa-baaa will be here and there to eat any dropped zucchinis so that they don't rot in the street.



Personnel and Collaborations

- List key personnel and collaborators.
- Briefly describe their experience and roles.

“Sadie MacDonald has a Masters in Biotech from MIT. She will use her experience cloning a quack-quack here with a moo-moo there to mate the zucchinis with fast-growing spaghetti squash from Indianapolis. This will produce the zoom-zoom-zoom-zucchini for the project. MIT is donating \$5,000 toward the power hoe.”



Evaluation

- Is the outcome measurable?
- Who will measure?
- What is used to measure and track this?
- When? How often?
- What will be measured? **Measure the reduction in hunger, don't just count zucchinis.**



Sustainability



- If applicable, how will the project continue to exist and produce a benefit after the requested funding expires?

“Once in full bloom, the space-age zucchini shoots seeds for several yards, spreading the zucchini throughout the farm’s fields. Our endowment, started last year with a generous donation from Old MacDonald’s State Farm Insurance, will cover the annual \$2,000 watering costs for the project.”



Budget

- One page
- Income = expenses
- Include all costs, including in-kind income, and “overhead” that can be allocated to projects.





What Next?

- Have leadership approve the content.
- Fundraise without leadership having to approve content of asks.
- Use your case as a template for proposals and for more stimulating donor pieces.
- Have your fundraisers study the case.

Thank You for Listening!

Mark Goldstein



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