



Dear colleagues,
Happy New Year! A new year offers a fresh start, an opportunity to establish a strong foundation for your development program based on four core fundraising building blocks – case, leadership, prospects, and plan. Before you develop your fundraising strategies for the year, it's important to have these fundamentals in order, beginning with your case for support. This edition of the Project Rock newsletter focuses on the case statement, and offers you tools and resources to help you develop your most important tool for fundraising.

- Dennis G. Serrette
Senior Vice President, Partnerships and Advancement



Case Statement

What is it?

A case for support (or case statement) is the who, what, when, where, why, and how of your organization. It tells donors who your organization is, what it has accomplished, what your vision for the future is, why your vision matters, why the donor should care (relevance), and invites the donor to make an investment in your organization. Your case statement should be rooted in your organization's strategic plan.



Why do you need one?

The case statement is one of the most important documents in an organization's fundraising arsenal. It clearly communicates your organization's relevancy and impact. All of your other fundraising tools, communications, and collateral, including major gift prospectuses, should be based on your case for support.

What should it look like?

The case statement should be 7-10 pages in length. It should be visually appealing and should include a combination of inspiring stories and images, as well as facts and figures to support both the community need and your Affiliate's impact. It should be concise, not wordy, logical, inspirational, and donor-centric. It should tell the donor your organization's story and conclude with an invitation – connecting why your organization is relevant to the donor, why they should consider supporting your work, and the impact their support will have on mission fulfillment.

How is it used?

The case statement can be used as a tool to cultivate donors – a leave-behind document after cultivation meetings. It can also be adapted into a major gift prospectus when donors are ready to be solicited in person. Case statements can also be used for Board or volunteer recruitment and during trainings, particularly elevator-pitch trainings to teach Board members, volunteers, and staff how to speak about the organization.

Who should you write it?

Consider assembling a Task Force of your Board of Directors and senior staff. Meet with the full Task Force to create an outline. Meet with each Task Force member individually to seek input. Prepare a draft. Then, meet with the Committee to review the draft and develop revisions. Once finalized, present the case to the full Board and test it among various constituency groups.



Outline of a Case Statement

- I. Welcome Letter from Local Urban League Affiliate President/CEO
- II. Mission of the Urban League Movement
- III. History of the Urban League Movement
- IV. Background on Local Urban League Affiliate
- V. Demographics and Challenges Faced by Local Community
- VI. Overview of Local Urban League Affiliate's Key Programs
- VII. Measurable Results of Local Urban League Affiliate Programs
- VIII. Testimonials/Stories from Clients About Impact of Local Urban League Affiliate Programs
- IX. Local Urban League Affiliate's Visibility and Presence in the Community
- X. Long-term Strategy/Plan for Local Urban League Affiliate (e.g., three- to five-year vision)
- XI. The Financial Need to Fulfill the Long-term Strategy/Plan (e.g., sustainability)
- XII. Recognition of Local Urban League Affiliate Leadership (e.g., Board Members)

Resources



Listen to our recorded webinar, "**Writing a Case Statement**" [HERE](#).



Download the **Case Statement template**, an abbreviated one-page or four-page term sheet, and an elevator pitch exercise for Board meetings, from the Case section of the Project Rock Toolkit [HERE](#).

Final Tips!

1. Keep it short.
2. Keep it factual and positive.
3. Use motivating, but not flowery text.
4. Incorporate illustrations and statistics.
5. Identify contributing leaders.
6. Remember its purpose.
7. Drive the process to complete the document in a timely fashion.
8. Stick to deadlines.
9. Be sure to involve leaders and donors.
10. Engage your executives and Board members to ensure the case is adopted as their own.
11. Try to get others to endorse.
12. Develop summary for distribution.
13. Use it to prepare sales material.
14. Use it for major gifts.
15. Be aware that no one will read it entirely!



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