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## The Case Statement

It is not unusual to discover that an organization's formal statement of justification for its existence and support has not been produced. And yet, the case statement is the single most important document that appropriately states your organization's purpose, methods, values, and budget. It makes your case for support.

The case statement includes a complete portrayal of the need, problem, or opportunity that your organization addresses and why OPM (other people's money) is needed. In other words, the case statement is the organization's authoritative rationale for donor support. It keeps everyone connected and working on the same page to support the organization. It maintains consistency in terminology and helps protect against misrepresentation, exaggeration, and mission drift. In addition, it is the document from which all other fund development materials are drawn.

The case statement answers the following questions:

1. WHY does your organization exist? The case statement explains why a specific organization is needed. For example, if there are already six after-school programs operating in the community, why is another one needed?
2. WHAT need, problem or opportunity does your organization address? The case statement documents client needs as related to identified challenges or opportunities. It explains the degree of community need through facts and figures, as well as through individual case descriptions and client success stories.
3. WHAT programs and services will your organization offer to provide a solution to the problem? The case statement will include a listing of the primary programs offered by an organization and a description of the services provided under each.
4. WHEN: Are there timelines for the programs and services? Ongoing, periodical, one time only? The case statement describes when each program service is provided throughout the calendar year. For example, after-school programs are operated during the academic year and summer camps and enrichment programs may be provided in the summer months.
5. WHERE: In what geographic areas will your organization provide the programs and services? The case statement should include a detailed description of the geographic boundaries of the organization's service district and may even include a map

- illustrating its location within its state or region.
6. WHO will the programs and services benefit? For example, a case statement may include longitudinal statistical studies, program performance data, demographic descriptions of area residents, documented trends, descriptions of changing client needs, etc.
  7. HOW will your organization's goal(s) and objectives be accomplished? The case statement describes the implementation strategies that an organization will use to facilitate its anticipated measurable goals and objectives.
  8. HOW will your organization provide the solution to the problem (the programs and services) better than other organizations? The case statement must explain why the organization is the best suited to provide its specific services. For example, if there are only sports focused youth activities in the community, an organization proposing to provide fine art programming for at-risk youth in the same community will serve the creative and leadership development needs of youth that aren't sports oriented. This needs to be explained clearly.
  9. HOW will your organization measure success and report the impact of the organizational achievements against the need? The case statement will provide information regarding how an organization will document program successes, client impacts, and program effects upon the community-at-large. Additionally, it may discuss how an organization regularly evaluates its success.

In short, the case statement *makes the case* for support. However, it *does not ask* for needed financial support - that is the function of a general operating, program, or project proposal.

However, the case statement is the primary document used by those creating proposals and cultivating donors when seeking funds for support. It is important to note that although a proposal is primarily drawn from the case statement, it is different in that it is usually shorter and more persuasive in tone. A proposal presentation package provides the materials appropriate for approaching funding agencies or donors. The materials are individually customized for each prospective donor or foundations (while retaining the purpose, mission and vision of the organization seeking funds).

It's easy to remember the differences between these documents: The case statement *justifies* the need for support, a proposal *asks* for it.