

DRAFT CASE STATEMENT TEMPLATE AND GUIDE

INTRODUCTION: WHY IS THE CASE IMPORTANT?

The case statement is the backbone for all campaign communications. It is inspirational, leading and finishing with passion and inspiration with a few important facts and figures included in between to support the case.

How well the case is made will drive the success of the entire campaign. It must be built with care and with the consensus of campaign leaders. The language matters, and the board and leadership are the source of that language.

Capture the most inspiring, authentic, and visionary ideas that are driving the campaign. Ensure leaders aligned around those ideas and language even if this means surfacing difficult disagreements around the message and mission.

PROCESS

After the board has signed off, the case statement and supporting materials can be shared selectively in draft form with a few potential lead donors to the campaign to create a substantive touchpoint before an actual solicitation. This helps gather important input from potential donors about how strong or weak the case is and provides a chance to improve the case before jumping into a campaign. This review is often done during a feasibility or planning study for a campaign.

The draft case statement is a living document and should stand alone, but will be supported by materials like the campaign timeline and gift pyramid. It should only be shared personally, accompanied by a personalized one-to-one note and an invitation to give confidential input to a trusted senior leader or consultant.

After the case is finalized, proposals, videos, blog posts, and other written materials are created that use the language and ideas in the case statement. Charts and graphs and other graphics may be added to the case statement. But these steps should follow, not drive or precede, the development of a strong case.

GENERAL GUIDELINES

Case statements should be brief, under two pages, with no charts, graphs, graphics or images to start. Avoid negative or desperate statements, avoid doom and gloom, talk about opportunity and vision and change. Provide the dollar goal and campaign end date early, and then later on include some data (e.g. how many people are going to benefit from the campaign.) Include a brief summary of the organization's accomplishments, quantifying impact where possible. Share any unique or sector leading or major accomplishments of your organization. Finish with a soft ask for a follow up conversation to gather input.

TEMPLATE

Paragraph 1: hook

Overarching brief statement about the campaign effort and organizational mission. Appeal to the heart. Capture the campaign's purpose and the work you do succinctly and powerfully.

Paragraph 2: brief summary

More about the meaning and impact of the campaign, what will change in the world, how will lives and futures and society be improved. Urgency but more appeal to emotion and inspiration. Include dollar goal and end date of the campaign.

Paragraph 3: why your organization is special and worthy

Brief overview of the organization. Mission, data on results, role in the sector, what distinguishes you from others, why you exist and must grow. Relate to front page stories about national/global issues you address. Avoid excessive detail or lengthy history. High level.

Paragraph 4: more about this project

Describe the project. What will actually be done with campaign funds, what will be built/launched. More factual info here. Include data on program reach enabled by the project. Include what will be new and be clear that the campaign is making this new impactful work possible. Keep at a summary level, leave details to be shared later. Touch at least briefly on all key aspects of the campaign that make it compelling to donors.

Paragraph 5: soft appeal for further discussion

This is not an ask document. Explain what philanthropy has done for your organization (e.g. “we are 100% funded by philanthropy”) and role of philanthropy in meeting this particular need. Make clear the need for a few dedicated individuals and institutions to step up to lead. Seek feedback and further discussion and advice on the plans. Thank and leave with inspirational message.

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