

Building a Case Statement Worksheet

Use this worksheet to help you build a compelling case statement that clearly articulates your vision, how your program or service can help accomplish it effectively, and why the foundation or donor you are approaching should fund your proposal.

The case statement should be clear and concise. Frame your proposal so that it describes the *benefits resulting from your work* and the reason for which you are seeking funding or support.

Step 1 - Getting Started

LEARNING – How did you get to the point of knowing you had a specific challenge in front of you? How do you there is a need? Did you discover something during an assessment, or community forum? Was it the promise of funding for a new program? Whatever the trigger, explain what you did (research, assessment, tracking, surveys, etc.) to clarify what the challenge is and confirm the details.

CHALLENGE – Describe the current challenges that you are trying to address. BE SPECIFIC. This could be a programmatic challenge, like the expansion of service delivery, or the launch of a new advocacy campaign. Maybe it is a business system improvement, like bringing all staff under one comprehensive communications system. Whatever the challenge, articulate what it is as specifically as possible.

RAMIFICATIONS - Explain what will result if you do not meet this challenge. What will happen if you do not take advantage of the opportunity before you or solve the problem that hinders you?

Step 2 - A More Positive Future

In step 1, you took a look at the challenge and how you came to understand it. Now it is time to look ahead to detail what the program, service or strategy will bring in total value of ownership to your organization. What will be different a year after the strategy is implemented? Will your program improve in some way? Will you be able to market your services to clients more effectively? Will you be able to mobilize constituents to take action more quickly? Whatever the benefits, it is your job to articulate that value to yourself, your board, funders, and any other stakeholder.

THE OBJECTIVE - What is the initiative you are planning or pursuing? This could be described in programmatic terms or operating terms. The key is to be clear and concise in describing what you are doing and why. It will be a proactive and assertive statement that makes clear to any reader exactly what you intend to do.

Here are some additional examples of strong objective statements.

- Our objectives are to improve tracking of client information, and increase efficiency by standardizing forms and using client data for multiple tasks (billing, reports, etc.).
- Develop a secure Wide Area Network (WAN) to allow clinicians access to accurate, updated client information.
- Develop a plan to revise our Web site in order to maximize communications among donors, volunteers, and partner agencies, as well as the community at large.

YOUR VISION of VALUE - How will this effort be beneficial? What will be the outcomes? For whom? Be specific! These must be powerful statements that justify your direction.

Will this new initiative or improvement result in new **learning and knowledge building**? For whom? Why does that matter?

| | |
|---|--|
| <p>Will there be improved coordination, cooperation and/or collaboration? Between whom? What will be the result?</p> | |
| <p>Will efficiency be enhanced or productivity increased in some way that is notable? In what type of savings could this result?</p> | |
| <p>Will there be any improvement in the delivery of programs? What will this mean for your clients or constituents?</p> | |
| <p>Will your ability to market the services of your organization be vastly improved in some way? What could be the result of this?</p> | |
| <p>Will your ability to perform fundraising increase?</p> | |
| <p>Other Benefits:</p> | |

Step 3 - Matching Value to the Funders' Interests

FUNDER TARGETS -For each of the funder targets you identify, you need to ask: "What needs of this donor will be met by making a contribution or grant to my organization?" "Will a grant to my organization further the foundation's objectives? If so, how?"

Step 4-Develop a Case Statement

THE CASE STATEMENT - Look back through this worksheet to the details in steps 1 and 2. Based on the funder you are approaching and your knowledge of their interests, craft a short case statement that clearly articulates your vision, how your strategy can accomplish it better, and why the foundation or donor you are approaching should fund the proposal.

The title. *It develops the theme and the tone for the case statement. Its job is to get the reader to turn to page one and begin reading.*

Grabbing the reader. *This happens in the first few paragraphs. Often, a compelling quote in the early part of the case works wonders. Or pose a question or compelling data.*

The irrefutable case. *Here is the need and the urgency.*

Your unique position. *This describes how the organization is positioned to meet the need head on. It must burn itself into the minds and hearts of the readers.*

Waving the flag. *Here you describe the history of the organization, its mission and its history. Reinforcing the urgency. This reminds the reader of how pressing the need is and how it must be dealt with immediately.*

Making it happen. *This describes what will be required financially to relieve the need.*

Summary. *This provides the closing and final blessing to the program. The theme is employed again for emphasis*