

1. The case statement template

The tool

The case for support or the case statement is the rationale behind your appeal. *Why* do you need the support, *how* the organization will use the money or the in-kind gifts from your donors, and *what* exactly your organization will do to serve the people and address their needs.

The case statement could be one paragraph answering to these three main questions (why, how and what) or it takes the form of a document that you will use internally or externally for developing and delivering smaller or bigger fundraising campaigns or for developing new proposals and initiatives to be presented to potential funders. No matter the length and the form of the case statement, you should make sure it is compelling for your potential donors, like local companies, and that it creates a sense of urgency for your cause.

A comprehensive **case statement** will include the following information grouped in eight sections (adapted from Weinstein, 2009):

1. **The organization's history**
2. **The people the organization serves**
3. **The way in which you serve the people and address their challenges and needs**
4. **The organization's reputation and stability**
5. **The organization's planning process**
6. **The organization's goals for the future**
7. **The ways of using the donations**
8. **The ways to recognize the donors' contribution**

The case statement's main sections explained

(adapted from Weinstein, 2009)

The organization's history

Write about organization's identity story: why and how it was founded, by whom, what the major accomplishments are and the milestones in the organization's history are.

Whom does the organization serve?

Describe the young people you serve, using demographic information, such as age, ethnicity, gender, geographic area, socioeconomic background, and any other information you consider relevant to include about them. Talk about real young persons from your organization or situations they face, collect stories and testimonials, and showcase the challenges young people face, and present the pressing problems your organization can address.

How does the organization address these challenges?

Write the story of your work, how you address the challenges and the needs described before; describe the programs and services you design and provide, and show your uniqueness - what makes your organization different from other youth organizations with similar missions and activities.

What is the organization's reputation for managerial and business acumen?

Bring evidence on your organization's stability and reputation (longevity in the community, leadership longevity, long-term partnerships, etc.) and also on the financial stability and fiscal responsibility (the annual budgets you run, the gifts received before, years of deficit-free operations, etc.).

How is the planning process described?

Talk about how you chose to do specific programs, and how you planned the activities, how you involved the stakeholders and community leaders, especially the youth, what tools you used - everything relevant you want to mention about your organization's decision process in choosing the programs and solutions to address young people's needs and the community's challenges.

What are the goals for the future?

This is the most important section of the case for support. Write down your goals, showing how your organization wants to improve the lives of the young people it serves, and showing the outcomes you expect for youth. Also, include program, financial, technology, administrative, governance, and human resource goals.

How will the donor's investment be used?

Talk about the fundraising needs, show relevant key budget items that need donors' support, and how the planned expenditures relate to the organization's mission and the services provided to the young people the organization serves.

How will the donor's involvement be acknowledged?

Describe how your organization will provide recognition, naming opportunities, benefits to the donors.

How to use the case statement?

A comprehensive case statement will help the youth organization:

- To clarify the organization's thinking and get everyone's from the organization, including donors, going in the same direction;
- To give fundraisers from the organization ready answers for proposals prepared for companies or other potential funders;
- To provide useful language and relevant stories to key staff, members, volunteers when they have to present, online or offline, the organization to relevant stakeholders;
- To provide basic inputs and meaningful information and stories for the organization's promotion materials and fundraising campaigns materials;
- To have a ready, basic presentation tool for any solicitation the organization has to make from diverse types of donors.

This tool was adapted from Stanley Weinstein, [The Complete Guide to Fundraising Management](#), 3rd edition, John Wiley & Sons, Inc., 2009.

Watch Simon Sinek's Ted presentation to understand how to use why, how and what rule:
https://www.ted.com/talks/simon_sinek_how_great_leaders_inspire_action?language=en