



Making a Case: Preparing for the Funding Request

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One of the most important functions of fundraising is how to make a case for funding that is suitable for all prospects and donors identified as potential givers (these are explained in the next section). A case is the compilation of information about the organization, its needs, and its opportunities, which will be presented to the prospective donor through a variety of means, ranging from face-to-face conversation to brochures.

A case tells the listener (prospect or donor) why he or she could or should support the cause. Preparing this document takes considerable time and thought because all the appropriate information must be gathered, agreement on the content must be achieved inside the organization, and the case must be customized for all possible donor markets—individuals or groups.

The preparation of a case statement serves various purposes:

1. Bringing internal agreement on what needs exist and how these can be met.
2. Verifying information so that accuracy and credibility are achieved.
3. Achieving support from the organization's leadership and constituents.
4. Seeing what gaps in information exist.

Case preparation consists of three steps:

1. Gathering all relevant information about the organization, the cause, and the need for which fundraising is to take place;
2. Compiling this information into one accurate, concise, clear document for internal use, which is the case statement; and
3. Developing case expressions for various purposes and types of donors, such as brochures, letters, and personal visits.

A case statement should consist of these parts:

1. Definition of the problem—a description of the problem that exists or what need should be met. Donors cannot and most often will not respond to a simple request that says, “We need money for . . .” They want to know what problem will be solved. However, donors don't give money for the problem; they give money to

the next step. They give money because the case has touched their hearts and minds and they know they will be making a difference in the lives of people.

2. The solution—a case statement should be explicit about what will improve, what will be better, what will be different, and what will change when money is given to solve the problem or meet the need.
3. Values—it is equally important to explain the value of working toward a solution for the problem. Fundraising is an exchange of values, and explaining the values answers the question of “Why is this important to solve, or why should this need be met?” In addition, mission statements express values, and this is a good testing point to see if an organization is adhering to its mission.
4. An explanation of what will be done to reach the expected outcomes, who will perform these tasks, when will they be accomplished, and any other detail necessary to understand the case being presented to the donor.

In compiling the information for the case statement, the following documents should be included:

- Mission statement, because this is the underlying philosophy and belief of why the organization exists.
- Goals and objectives of what is to be achieved along with brief descriptions of how these will be achieved.
- Qualifications of those who will carry out the project, program, or campaign to show that they are capable of carrying out the programs.
- A project budget.
- Success stories that verify the organization is capable of carrying out the goals and objectives—in other words, a track record.

Once the internal case statement has been prepared with input of the organization’s leadership and board members then case expressions can be developed that will address various audiences. One case expression cannot meet all audience needs. Sometimes a brochure or even a flyer is appropriate. For other instances, the case expression is actually the person interfacing with the donor on a one-to-one basis. Materials that express a case can include the following:

- Proposals
- Brochures
- Letters, personalized or for mass mailings
- Phone conversations, or mass phoning
- The many uses of the Internet, e-mail, and texting
- Oral presentations to groups
- One-on-one conversations



The fundamental case statement, which an organization prepares, is the foundation for approaching prospects and donors for a specific purpose. The preparation of the case statement and case expressions will sometimes expose weaknesses in operations, planning, and project or program implementation. Without a strong case statement that is based on facts as well as carefully analyzed needs for funding and human resources, the fundraiser, whether a full-time professional, a volunteer, or a part-time employee, will have a difficult time talking to a prospect or donor about the cause and the need, and bringing the effort to a successful conclusion.

