

Case Statement Basics

March 2007 [By Abny Santicola](#)

Case statements are useful for everything from capital campaigns, annual appeals and grant writing.

Tom Ahern, founder of nonprofit communications firm Ahern Communications, Ink, says he writes, on average, one case statement a month for a client. In his session Monday at the AFP 44th International Conference on Fundraising in Dallas, Ahern discussed the basics of building outstanding case statements, including how to gather the right kind of information, how to plan a campaign strategy and a formula for presenting a case in print.

The key to writing a case is to anticipate all of the big questions prospective donors may have about the project, answer them and “put a cherry on top,” said Ahern.

Step one is information gathering. Ahern recommended gathering the following organizational information:

- your mission;
- your vision;
- your values;
- your strategic plan;
- your monetary goal and what that money buys;
- data on those you serve;
- trends;
- information on emerging or increasing needs;
- the organization’s history;
- all outbound communication;
- news clippings;
- descriptions of programs and services;
- proof that your programs are worth doing and that they work;
- an overview of the organization’s governance;
- staffing; and
- financial information.

He also recommended conducting “key informant” interviews by phone to fill in any blanks in your information.

After gathering information, Ahern recommended sorting it into categories to create an “internal case,” which he described as a database of potentially useful information that’s unedited, confidential and not meant for circulation.

When sorting through the information in the internal case, Ahern says you should ask three questions: Why us?, Why now? and Why you?

- Why us? — What is your organization doing that is so unique and wonderful that people should want more of it and support its new plans?
- Why now? — What’s the rush? What changed? Why is the campaign crucial now?
- Why you? — The “you” here is the donor. Why are donors critical to your vision? Have you made them the heroes? What are your emotional triggers? Some examples of emotional triggers are fear, hope, anger and action.

“Make the donor the real hero of the story and shift the burden for achieving success to their shoulders,” Ahern advised. Use a donor-centric mentality that says, “With your help, all these amazing things happened. And without your help, they won’t.” Come up with a theme for your campaign. It could be simple (e.g., “Campaign Oregon”), forward-looking (e.g., “Extend the View: Shape Tomorrow Today”), highlight giving back (e.g., “Generations Campaign”) or be about the pursuit of excellence (e.g., “A New Vision of Excellence”).

Your case, like a story, should have a beginning, a middle and an end. The beginning presents the problem/solution, the middle supports the problem/solution with evidence and the end is the call to action, where you shift responsibility to donors’ shoulders. Ahern called this the AIDA formula: grab Attention, build Interest, stimulate Desire and then make the call to Action.

Make your point in the first headline or sentence, if possible, and be succinct. “You should be able to skim a case, as you would a newspaper, and get the key points, without reading any of the long text. That’s reader convenient,” Ahern said.

Things that interest donors are:

1. Accomplishments, i.e., “What did you do with my money?”
2. Vision, i.e., “What could you do with my money?”
3. Recognition, i.e., “Did my support matter? Am I important?”
4. Efficiency, i.e., “Can I trust you with my money?”

Think of your case statement as a series of “Ah-has,” he said. An organization’s reasons for wanting gifts are different than donors’ reasons for giving. Donors’ reasons are emotional, so use emotional triggers. Some triggers Ahern advised for direct mail are:

- anger,
- exclusivity,
- fear,
- flattery,
- greed,
- guilt,
- salvation,

- hope,
- love,
- compassion,
- duty and
- faith.

Ahern talked about using “emotional twinsets” or problem/solution sequences to capitalize on the emotions of prospective donors. For example, present emotional unease by focusing on negative emotions, relieve that unease with positive emotions and then ask the donor for help.

As two final notes, Ahern recommended using photographs to give the case a feeling that the organization or its beneficiaries are making eye contact with potential donors, and use anecdotes in place of statistics.

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