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What to Include in Your Case Statement

In some instances, your request may be so substantial, or your project so major, that printing an elaborate case statement may prove useful. However, most major donors prefer a case statement tailored to them — rather than a glossy printed booklet or brochure. As you prepare a case statement to give or leave with your prospect, consider including the following information:

- 1) Message from president or chair of the campaign
- 2) Your organization's mission or purpose statement
- 3) A brief history of your organization or project — your record of accomplishment
- 4) An outline of your organization's proposed solution to a pressing need — indicating how your capital or major gifts campaign will make the proposed solution a reality and the long-term benefits that will result from achieving the campaign's objectives
- 5) Specific programs or projects that will be funded by the campaign — with greater detail of the program of greatest interest to the donor you're meeting with
- 6) Named gift opportunities — what size gift results in what recognition
- 7) The campaign budget and gift table — how much you're seeking to receive for each project and how many gifts are needed at each level to meet the campaign goal
- 8) Lead gifts and the recognition they've received
- 9) Endorsements from community or national leaders