

Endowment Building Cohort

The Case Statement: Your Role as an Essential Community Organization/
Overview of Common Types of Planned Gifts

What is a Case Statement?

- *A case statement is simply a written document that states the most important facts about an organization. It can range in length from a wallet-size card to twenty pages or more. Preparing such a statement provides the opportunity to amass data that will best illustrate the competence of your staff and the effectiveness of your work. **

* As defined in *Securing Your Organization's Future* by Michael Seltzer



How does having a case statement benefit your organization?

- Who you are
- What you do
- Why you're doing it
- Why you're different than other people doing that thing
- Why it matters
- How you're doing it
- What you need to do the thing you're trying to do
- The impact of donors and support

The Case for a Case Statement

1. Keep you on track and donor-focused when you are asking for support.
2. Help other people make an ask for your organization.
3. Give the community a clear and consistent way to share your story.
4. It almost guarantees your fundraising will be more effective.
5. Internally, it will inform how you describe your organization in fundraising
6. Provides clarity, targeted, and a more inspiring story of your organization.
7. Externally, it will encourage people to support you.

Example of Case Statements

Nonprofit has been a beloved performing arts organization in the Yampa Valley for almost 20 years. We have shared inspiring productions and concerts, enriching community programs, and a broad array of educational and training programs with thousands of people in our community and from around the country. In addition, we are a highly-collaborative partner, working with other local arts, health and human services, and education organizations to uplift our societal “soul.” Our programming entertains, helps people heal, brings awareness to social issues, brings joy to individuals and families alike, educates, and positively impacts the economic vitality of our region.

Our work at **nonprofit** is made possible thanks to supporters like you. Your continuing support will help us bring the transformative power of the musical arts to our community and visitors for years to come



Example of Case Statements

- **Purpose and Impact** – This nonprofit works to promote and support agriculture in the Yampa Valley to ensure that local agriculture remains vibrant for future generations. This nonprofit programs bring education, connections and resources allowing local agriculture to continue to adapt to a changing economy, environment, and growing community.
- **Why it is important that your organization be in operation in 50 -100 years?** - Our heritage of agriculture and current ag operations are a critical part of the fabric of our rural community. In the future the working landscapes and scenic views that ag provides will continue to bring environmental, economic and cultural benefits for the Yampa Valley. Once lost, this cannot be replaced.

Next Steps with your Case Statement

- 1) So what?
- 2) What is the community coming together to accomplish?
- 3) What will a donor be a part of?
- 4) What changes will you see in the community today, in 50 years?
- 5) Why should someone join you?

Common Types of Planned Gifts

- Bequests
- Retirement Plans & Life Insurance
- Life Income Gifts
 - Charitable gift annuities
 - Charitable remainder trust
- Charitable lead trusts
- Real Estate Gifts (Life Income Gifts)

Homework

1. Spend time to finalize your case statement and send to YVCF by March 12th.

See you next month

Yampa Valley Community Foundation

yvcf.org

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