

Using the Case Statement Worksheet

*The process of writing the case is as important as the final product. —
Susan Whitmore*

An effective family philanthropy program requires more than a strategy. It requires the support and buy-in from your community foundation's executive leadership and board.

Community foundations have a number of important priorities — and they have diverse constituents. As a result, it's easy for family philanthropy programs to lose traction unless they have this high-level support. Without it, you're unlikely to be able to get the time and attention necessary to grow and nurture your family philanthropy program.

An **internal case statement** can be an important tool for building support among your executive leaders and board.

Many community foundations and nonprofits use case statements to help build support among potential donors and other supporters for initiatives such as capital campaigns and new programs. These statements typically outline an organization's mission and vision, describe a challenge it is trying to overcome, and highlight actions that donors and other supporters can take to help the organization seize an opportunity to overcome that challenge.

As you begin the process of building internal support for your program, we recommend taking some time to draft a case statement that articulates the challenges and opportunities facing your community — and how giving families can help your foundation achieve its vision for your community's future.

NCFP has created a **downloadable worksheet** that will help guide you through the process of creating your internal case statement. The following pages provide suggested questions that will help you complete each section of the worksheet.

Here is some advice for completing your internal case statement:

1. While you are confronted with a number of questions to help you draft each section of the case statement, the narrative you create can be short and simple. Identify the pieces of each section that are most relevant to your foundation — and to your community.
2. Since your case statement is meant for an internal audience, you don't need to pull out all the stops in presenting it. Your goal with this exercise is to create a written statement that builds support for your family philanthropy services.
3. Your internal case statement can provide seed material and language that can help guide future marketing materials — and inform your thinking for the structure and approach of the program itself. As a result, we recommend keeping your notes and using them as your program evolves.

If you have questions about using our Internal Case Statement Worksheet, or have ideas for modifying it, please contact community@ncfp.org.



Internal Case Statement Worksheet Questions

The following questions can help you develop an internal case for expansion of services to philanthropic families.

1. **What is your community foundation's purpose?**

How and why did your community foundation begin?

What is your community foundation's mission statement? Vision statement (if applicable)? Values statement (if applicable)?

What role do you play in your community?

- * What do you fund?

- * How are you a leader in your community? What issues do you focus on?

What are some of your foundation's accomplishments?

How has your role changed throughout the foundation's history?

If your organization did not exist, would somebody else invent it? If so, why?

How are you distinctive?

What are your current measures of success?

2. **What are your community's defining characteristics?**

How is your community defined? What geography does it cover? What is its population?

What is your community known for?

What are your community's general demographics?

How is your community distinctive?

Where is the community in its history? Are you an older community that is facing a decline, a mature community that is reaching its peak, or an emerging community that is still looking to define itself?

3. **What are your community's greatest challenges?**

Which areas of your community face the most pressing short-term needs (eg. early-childhood education, job opportunities)?

Which populations in your community are underserved?

What changes are happening in your community that are causing pain to certain populations, neighborhoods, etc.?



4. What are your community's greatest opportunities?

Which areas of your community are facing economic growth (this could be industries, neighborhoods)?

What type of philanthropic and corporate capital can be leveraged to improve your community?

What types of demographic changes are cause for hope?

5. What is your vision for the future of your community?

If your work is successful, what will your community look like in the next 3-5 years? 10 years? 20 years?

How will conditions improve?

What new opportunities will arise?

What needs to happen in order to achieve this vision?

6. How can giving families help your community foundation achieve this vision?

How will a family philanthropy program accelerate your vision?

How would it position your foundation and your community for future growth?

What would it mean for your community?

