

BRANDRAISE RESOURCE

Case Statement Strategy Workbook



GIFT PYRAMID FOR \$6,700,000			
FROM	TO	TOTAL DONORS ASKED	\$ AT THIS LEVEL
1,000,000	1,250,000	1	1,125,000
500,000	999,999	3	750,000
250,000	499,999	5	1,125,999
100,000	249,999	13	1,574,996
50,000	99,999	20	674,996
25,000	49,999	25	449,994
10,000	24,999	60	612,483
5,000	9,999	109	449,970
	<5,000		
			<many
GIFT PYRAMID FOR \$3,000,000			
1,000,000	1,250,000	1	1,125,000
500,000	999,999	3	750,000
250,000	499,999	5	1,125,999
100,000	249,999	13	1,574,996
50,000	99,999	20	674,996
25,000	49,999	25	449,994
10,000	24,999	60	612,483
5,000	9,999	109	449,970
	<5,000		
			<many

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Welcome!

If you are here, chances are you are thinking about creating a case statement.

And if you are like many Executive Directors, your instinct might be to open a blank document and start writing.

That instinct makes sense. You are a doer. You want momentum. You want something tangible you can share with your Board and your donors.

But here is what we have seen time and again.

When organizations jump straight into writing, they often end up with a case that sounds good on the surface but does not fully connect, clarify, or convert. Not because the writing is poor, but because the strategy underneath it was never fully defined.

A strong case statement starts long before the first paragraph is written.

It starts with clarity.

This workbook is designed to help you build the core strategy behind your case so your eventual document can do what it is meant to do: support meaningful donor conversations and inspire confident investment in your work.

You do not need perfect answers today.

You do not need to complete this in one sitting.

Your goal is simple: Get clearer than you were before.

Clarify the Role of Your Case Statement

One of the most common challenges we see is unrealistic expectations around what a case statement is supposed to do.

Many organizations assume the case must explain everything, persuade everyone, and close the gift on its own. In reality, the case statement is a support tool. It is designed to strengthen conversations, not replace them.

Getting clear on the role of your case now will make every decision that follows easier and more focused.

1a. What activities is this case meant to support? (I.e., major donor conversations, cultivation meetings, proposals, board engagement, campaign communications.)

1b. What is this case NOT responsible for doing? (I.e., close a gift on its own, explain every program detail, serve as full organization history.)



If this section felt fuzzy, your organization may not yet have shared expectations internally about how the case will be used. That is common and worth clarifying early.

Shape Your Primary Narrative Arc

Your case statement is not just a collection of information. It is a structured story that helps donors understand the problem you are solving and the role they can play in the solution.

Donors are drawn to clear problems and credible pathways to impact.

Your narrative arc should help them quickly grasp:

- What is at stake
- What will not happen without your organization
- Why your organization is positioned to respond
- What will change because of this work
- How they can help make it possible

As you work through this section, focus on clarity over polish. You are shaping direction, not writing final copy.

2a. What core challenge, need, or belief should immediately pull your donor into the story?

2b. How is your organization uniquely positioned to address this problem?

2c. What will be different because of this work? What outcomes or changes will donors help make possible?

2d. What are you specifically inviting donors to help fund? Be as concrete as possible.

Decide What Gets Emphasis (and What Does Not)

Most nonprofit leaders do not struggle with having too little to say. More often, the challenge is deciding what truly belongs in the main case narrative.

A strong case statement is focused and intentional. It highlights what matters most and avoids overwhelming the reader with too much detail at once.

Remember, not everything has to live in the main narrative.

If certain information is helpful but not central to your core case, it can often live in an appendix or supporting materials. This allows your case to stay clear and compelling while still giving your organization a place to house important reference information.

3a. What are the most compelling elements that must be front and center in your case?

3b. What information is helpful but not core to the main story?

3c. What might move to an appendix, separate document, or supporting material?

Translate Your Uniqueness Into Donor-Relevant Impact

Many organizations can clearly describe what makes them different. Fewer can clearly articulate why that difference matters to a donor.

This quick exercise helps you connect your organizational strengths to real-world outcomes that donors care about.

Work through one or two of your strongest examples.

4a. What makes your organization unique?

4b. What happens because of that unique feature?

4c. Who cares about that and why?

4d. What is the broader outcome or result?



NEXT STEPS

Congratulations! You now have something many organizations skip entirely: a clearer strategic foundation for your case statement.

Even this level of intentionality can help your case feel more focused, more credible, and more useful in real donor conversations.

If you found yourself confident in some areas and uncertain in others, that insight is valuable. It shows you exactly where to focus next so your major gifts efforts can grow with greater clarity and confidence.

If you would like a second set of eyes on your brand, messaging, and fundraising readiness, our Brand and Fundraising Audit is designed to help.

Through this process, we identify where your strategy is strong, where gaps may be holding you back, and what next steps will create the most momentum.

[CLICK TO LEARN MORE ABOUT THE \\$500 AUDIT](#)

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