

OUTLINE FOR WRITING CASE STATEMENTS

A case statement begins as an internal document that will become the foundation for a variety of external uses such as: collateral for the comprehensive campaign, future web content and division marketing materials, major gift proposals, and talking points to external audiences. A compelling case will inspire donors, faculty and staff, trustees, and community members about your initiative's vision, importance, relevance, and most important investment opportunities. It should be concise, but include enough detailed "proof" to inspire confidence in your vision and planning efforts.

As the university develops and clarifies its vision and case for support, so must each division and initiative in support of its goals and critical priorities. Initial case statements are typically tested with donors and other key influencers and refined before production of final campaign collateral and other marketing materials begins. The final campaign pieces will contain additional elements, including photos, sidebars, profiles, etc., based on the final campaign theme and creative approach. What follows is a guide for the development of internal case statements:

1. CASE OPENING PARAGRAPH

Describe the compelling societal issue/need that your unit addresses. Why is your unit qualified to address it? What is the big idea or opportunity within your unit that will address this issue? How does private support advance this work? Connect emotionally, concretely with the donor.

2. VISION AND GOALS

(1-2 graphs)

What will your division look like/what impact will it have, 5-10 years from now?
How does this align with UCSC strategic vision?
How are you preparing to make this impact/achieve these aspirations?
Clearly list the key initiatives within your unit-- the important ideas and projects that donors will have an opportunity to fund. Reiterate why they are important

3. BACKGROUND/QUALIFICATIONS

(1-2 graphs)

Overview of the unit's history and importance. When/why formed, historic landmarks, etc.
What are unit's strengths and top assets. What distinguishes it? Answers the question "Why should I fund this above anything else?" Key accomplishments, outcomes and successes of department and/or students

All the above should validate why the unit/initiative is poised to have an impact on key issues identified in first graph, succeed in achieving vision, and worthy of support.

4. OPPORTUNITIES FOR IMPACT

(1-2 graphs)

Summary of strategic direction and priorities. Gives overview of key funding opportunities and dollar amounts sought, organized in three categories:

PEOPLE, PROGRAMS, FACILITIES/SPACES

Convey impact unit and donor can make

SEPARATELY COMPILE A TIGHT LIST OF ALL FUNDING OPPORTUNITIES ORGANIZED BY

PEOPLE

Student support

Faculty support

PROGRAMS

FACILITIES