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COLLECTIONS

Advisor



Martin Collection, Indiana Historical Society, cropped from original

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What is a Case Statement, and Why Should We Write One?

By Tiffany Hatfield, Executive Director

Association of Indiana Museums

tiffany@indianamuseums.org, www.indianamuseums.org

So much to do. Too few people to complete all the tasks. Sure, we can raise some money from members, programs and a few grants. The area stores and banks have supported us, sometimes. Now you're telling me that we need to consider writing a "case statement." What is it? Why? What will it get us?

In short, a case statement will prove to be a good tool to advance your museum's fundraising and growth. It succinctly tells the story of your organization and lets people know about what you do. This article will provide the essentials that produce a strong case statement.

You know that there are many nonprofit organizations in your area, whether rural, suburban or in the heart of the city. They were founded, as was the museum you care for, to meet a need in the community. Your case statement sets you apart. A strong case statement:

- gives potential supporters a clear picture of the need your museum addresses

- demonstrates what qualifies you to address it
- tells how well you address it
- shows what makes your site unique
- explains how others can help you, with time and/or money

It's a tall order, to be sure, to prepare a case statement. But once complete, it will last for some time. These are the essentials of a good case statement.

Essential 1: Write concisely. Provide a brief overview of how and why your organization came into being. The entire document should be no more than three to four pages, so this overview is a summary, not an exhaustive treatise. That longer organizational history belongs in the museum for further reference, not here.

Essential 2: Have a mission statement and an organized plan of goals and actions for the next year or two to indicate that you have stability in your operations and know where you are headed as an organization. Call it a strategic plan if you wish.

Essential 3: Be accurate and current. List the museum's income sources, expenditures, program offerings, staff, who is on the board and how they're elected.

Essential 4: Make it pleasant to read. Tell (short) stories about the impact your organization is making. Have graphs and charts for financials, photos of the site and exciting news about recent accessions along with a photo.

Essential 5: Make sure the community at large is well represented. Your organization serves the whole community, so make sure that board, staff, volunteers, visitors, etc., cut as broad a swath as possible through the population you serve. Supporters want to know that whatever they provide, the benefits are widely felt, not just for a few. Festivals, school programs, public lectures, for members and nonmembers all provide opportunities for broad participation.

Final Essential: The case statement shouldn't be

written by one person in seclusion – at least not until the board, key staff, critical volunteers and community supporters have provided thoughtful insight into the document's content.

Use your case statement as a guide for all of your other materials. Remember the case statement tells your organization's story. The information in a good statement can be included in your other fundraising materials, brochures, newsletters and press releases. The case statement can also be adapted for use in grant applications, given to donors to show them who you are and used to recruit and train board members .

With these essentials, the stage is set to prepare a strong case statement. To see samples and for more information, check out the following links.

- National Consumer Supporter Technical Assistance Center: Fundraising Basics www.ncstac.org/content/materials/FundraisingBasics.pdf
- The EPA offers a lesson on writing a case statement www.epa.gov/owow/watershed/wacademy/acad2000/sustainablefinance/files/case_howto.pdf
- RM Foundation has a whole series of “how tos” on fundraising for nonprofits www.rescuemissionfoundation.org/rmf/howto-casestatement.htm
- Qm2, a consulting firm, also provides an online paper on developing a case for support www.qm2.org/Developing_a_Case_for_Support.pdf
- Connecting to Collections Online community www.connectingtocollections.org
- Indiana History Society Lending Resources Center www.indianahistory.org/our-services/local-history-services/lending-resources

Hoosier Heritage Alliance Regional Conferences
\$10 per person (includes lunch)

- Carnegie Center for Art and History, New Albany
Monday, April 16
- Cunningham Memorial Library, Indiana State
University, Terre Haute
Friday, April 20

Conference topics are the same at each conference; speakers vary. Morning sessions will focus on what to collect and how to raise funds for collections care. Afternoon sessions will include hands-on collections care training and tours of the host site's collections storage areas.

The registration deadline has been extended to April 8.

For more information or to register, visit www.indianahistory.org/our-services/local-history-services/hoosier-heritage-alliance/regional-conferences

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