

ELEMENTS OF A SUCCESSFUL CASE STATEMENT

1. Identify and validate the need (human or societal) – primary reason for funding

This need is bigger than a single program, student, department, college, campus or even university. This first step helps the prospective donor understand the kind of impact his or her philanthropic investment can make. Consider questions like:

- *How will this research benefit society?*
- *What is the long-term economic impact of this program?*
- *What broad societal, economic, and demographic trends support the importance of what we are trying to do at WSU?*
- *How will WSU's ability to graduate more students in a discipline (e.g. teachers, engineers, pharmacists) benefit our community, the state, and the world?*

2. Document the needs – testimony as to validity should be expressed by some source other than the requesting organization

What sources of data or information do we have that support the perspective presented in step one? U.S. and state data? Global and national think tanks? Professional associations? Academic studies?

3. Identify the programs and strategies designed to address the needs

How does your program, department, scholarship, research, or other work speak to these trends? This statement should be aspirational, but should also directly address how Washington State University is doing its part to meet broader social, national, scientific, or academic goals.

4. Establish the competence of the organization and its staff – demonstrate the organization's ability to steward the gift.

This is where your program gets to shine! Talk about the qualifications of your faculty, staff, program, awards and honors. This should be focused and concise. Establish your credibility, but as if you are discussing it with an intelligent neighbor – put things in terms that any audience can easily grasp. Briefly state why the investment in this work should be made at WSU through Extension.

5. Explain who will benefit: recipient, family, neighborhood, community, society – how can the benefit be globalized or taken to a larger audience? Looking for replication not duplication.

Just a few sentences here, to connect the competence and credibility that you have established to the great potential your program, department, research, scholarship, etc. has to address the need established in steps one and two.

6. Identify the resources required to fund the need.

Be specific, but not technical. If the case statement is to be used for a broad audience, it may be prudent to offer several options and levels of support.

7. Explain why the prospect should give.

This may not be necessary for a case statement presented for discussion in a face to face meeting. If you have done a good job of articulating your case in steps 1-5, the prospect should have a good understanding of the benefits of investing in WSU. If appropriate, state why this prospect may care about this particular need – is it in his or her area of expertise or will it impact an industry in which the prospect cares deeply or has benefited financially?

8. How can the prospective contributor give?

IF your case statement is going to a large audience, a reply mechanism (form, envelope) should be included, along with a way to contact WSU for more information.

Your area development staff can help develop a strategy appropriate for individual prospects in terms of ways to give.

9. What's in it for the contributor? Tax deduction is not enough – what is the societal/spiritual/intrinsic benefit?

Again, if the person is philanthropically inclined and you have made your case effectively, it should feel good for the donor. This is a good place to include statements from lead donors or other donors about their reasons for giving and/or statements about the impact of previous gifts from students, faculty, and staff.

EXAMPLES

1. Identify and validate the need (human or societal) –the primary reason for funding

From the WSU Entrepreneurship and Innovation Case Statement:

Imagine students graduating as K-12 teachers and administrators, artists and musicians, veterinarians, pharmacists, physicists and mathematicians, architects and community planners, political and environmental scientists....who have not only an in-depth knowledge in their formal disciplines, but also the capacity to change those disciplines in ways previously unimagined.

Entrepreneurship education has traditionally been an enterprise of business and engineering schools, but imagine the impact of expanding the teaching of innovation to the disciplines mentioned above. WSU aspires to produce graduates who will not accept the status quo, but who seek to positively affect the way communities are built and governed, the way kids are inspired through teaching, the way health care is advanced and delivered, and the way information and technology are used to improve the quality of life for people around the world.

2. Document the needs – testimony as to validity should be expressed by some source other than the requesting organization.

From the WSU Regents Scholars Case Statement:

According to the Washington State Higher Education Board's August 2002 report on higher education in Washington State:

- *Tuition increases out-pace other goods and per capita income - Since 1991, tuition and fees have increased 78 percent at the state's public research universities, while the prices of most other consumer goods increased an average of 22 percent. Per capita income during the same time period increased 49 percent.*
- *More students take on more college debt - More than 30 percent of all students attending Washington state institutes of higher education in 2000-2001 received need-based financial aid, including grants, loans, and work-study. In addition to these sources of financial aid, most students must reduce expenses, find employment, or take out personal loans to meet their college costs. More than 80 percent of students graduating in 2000-2001 carried some form of student debt. We could find out the actual average indebtedness from OSFA/OSS.*

The very best students are offered great scholarship and financial aid packages from others - High-achieving students receive merit-based and need-based scholarship offers from well-known private and public universities across the nation.

3. Identify the programs and strategies designed to address the needs

From the WSU Regents Scholars Case Statement:

The Regents Scholars Program recognizes and rewards high-achieving high school students in the state of Washington. It provides substantial scholarship support for them to pursue their WSU education and public recognition of their accomplishments. Eligible students are nominated by their high school principals. All nominated students will be considered for one of up to 500 Regents Scholarships offered by the University:

- *Students who are selected as one of up to 400 Crimson Regents Scholars are offered a minimum of \$3000 in scholarship support, renewable for one year;*
- *Students who are selected as one of 75 Silver Regents Scholars are offered a minimum of \$4000 in scholarship support, renewable for one year;*
- *Students who are selected as one of 25 Distinguished Regents Scholars are offered a scholarship for the full amount of undergraduate resident tuition, fees, on-campus housing and board, renewable for four years.*

Students nominated for the Regents Scholars Program are well-rounded individuals with a variety of academic and non-academic interests and accomplishments. They must be:

- *Academically strong: Minimum grade point average of 3.80 Must have completed the SAT or ACT prior to the beginning of their senior year.*
- *Leaders in both academic and extracurricular settings*
- *Involved in school and community – as participants and volunteers*
- *Excellent communicators*

4. Establish the competence of the organization and its staff – demonstrate the organization’s ability to steward the gift.

From the WSU Regents Scholars Case Statement:

ACADEMIC EXCELLENCE

Washington State University is a Top 50 public research university, as ranked by U.S. News and World Report (2003). Offering more than 250 fields of study, including numerous academic programs that have won national and international recognition, Washington State also boasts one of the nation’s top Honors Colleges. Students work in cutting-edge facilities with some of the best equipment available in their fields, have opportunities to study abroad, and gain hands-on experience

through undergraduate research and internship programs. As the only major public research university in the nation to require an approved writing portfolio for graduation, WSU gives its graduates an advantage in the real world – communication skills valued by employers and graduate and professional schools.

5. Explain who will benefit: recipient, family, neighborhood, community, society – how can the benefit be globalized?

From a WSU Bio-computing Proposal:

WSU scientists have discovered that it is possible to “grow” human-like collagen in the grain of barley plants for a multitude of medical uses such as tissue engineering, wound sealants and treatment of rheumatoid arthritis. Imagine that this technology serves to demonstrate not only that mammalian proteins can be grown in cereal grains, but that other, life-changing proteins such as cancer therapies, can be grown in cereal grains, soybeans, corn, and other crops. Imagine the impact that such technologies could have on the United States. Now, imagine the impact that they could have on developing nations.

6. Identify the resources required to fund the need

From a WSU Bio-computing Center Proposal:

WSU’s vision for creating a world-class Center for Bio-computing is a \$25 million dollar endeavor and includes the following elements:

Center for Biocomputing	
Facility Technology Enhancements	\$10 million
Endowed Chair and Other Faculty Positions	\$9 million
Endowed Technology Fund	\$6 million
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Grand Total Costs, Facilities and Programming	\$25 million

7. Explain why the prospect should give

From the WSU Entrepreneurship and Innovation Case Statement:

*This Initiative is a transformational opportunity that will fundamentally change the way education is delivered at Washington State University, creating a legacy of world-class preparation in Entrepreneurship and Innovation. The WSU **Initiative in Entrepreneurship and Innovation** – through an integrated, interdisciplinary educational approach – will transform Washington State University into an international force in the preparation and empowerment of entrepreneurial leaders who will drive the global economy into the future. People and organizations from around the world will look to WSU as a thought leader in research on entrepreneurship and*

innovation, and as an incubator for the creation of leaders in entrepreneurship, innovation, and change.

8. How can the prospective contributor give?

From the WSU Regents Scholars Case Statement:

SUPPORT EXCELLENCE AT WASHINGTON STATE UNIVERSITY

You can create an Endowment in any amount greater than \$25,000 to support the Regents Scholars Program. Your endowment may carry your name or be named for an individual or organization you wish to honor.

Distinguished Regents Scholarship \$400,000 – supports one distinguished Regents Scholar annually

Silver Regents Scholarship \$125,000

Crimson Regents Scholarship \$100,000

or *Make an Annual Gift*

Silver President's Associates \$10,000 annually

Crimson President's Associates \$5,000-\$9,999 annually

President's Associates \$1,000-\$4,999 annually

Bryan Society \$500-\$999 annually

Tower Club \$100-\$499 annually

Sustaining \$1-99 annually

Please use the enclosed reply envelope to designate your gift, of any amount, to the "Regents Scholars Program"

*c/o WSU Foundation
PO Box 641927
Pullman, WA 99164-1927*

If you have questions regarding your interest in establishing a named endowment or directing your support the Regents Scholars Program, contact the WSU Foundation at 1.800.448.2978 or 509.335.6686 or email foundation@wsu.edu. More information about the WSU Foundation can be found on the web at <http://wsufoundation.wsu.edu>.

9. What's in it for the contributor? Tax deduction is not enough – what is the societal/spiritual/intrinsic benefit?

From a WSU Biocomputing Proposal:

*A prominent donor making an investment to build bio-computing as an institutional strength in support of existing strengths in the life sciences, engineering, and agriculture at Washington State University will make a major statement in support of new opportunities for improving the lives of the people of the world. Medical advances in the post-genomic era will be unparalleled in human history. The **Center for Bio-computing** will marshal the necessary resources and talent to support the multidisciplinary research that WSU is uniquely poised to deliver.*