# Endowment Case Statement

# Guide and Worksheet

# Your case statement is intended to remind donors of the impact camp has on the lives of children and families in your community and the Jewish world. A strong case statement makes clear that this initiative is vital not just to your camp but to the future strength and vibrancy of the Jewish community and people. Show your donors how camp’s work aligns with their personal values, as your work helps to create the future they envision.

It is different from most things you are asked to write. It is not a recruitment tool to get families to sign up for camp, but rather a reminder of camp’s deep and enduring impact. It focuses on the future and not on your current needs.

In addition to being the introduction to your Endowment Plan, it is intended to be used as a stand- alone piece to share with the individuals you will be having endowment conversations with and to provide language for other marketing materials. Imagine donors asking themselves, “Why me? Why now? Why endowment for camp?” An effective case answers these questions.

Be sure to keep your case statement to ***one page***, write in an ***active voice***, and print in an easily read font. We recommend you include some photos to help tell your impact story.

Your case statement should motivate and inspire members of your community to make either a current gift or a legacy commitment to your camp’s permanent endowment fund. It should be ***positive, forward****-****looking****,*and ***confident***. It should articulate why your camp must continue to flourish as an essential Jewish experience now and for future generations.

Your case statement should promote the emotional connection donors and families have to camp. It should invite donors to be part of your future through supporting the endowment as it clearly articulates the impact current endowment gifts and legacy commitments will have on those you serve.

Before you begin writing, we suggest that your endowment team share with each other why you have chosen to give your time, energy, and financial resources in support of camp and the vital role it plays in your own lives. You may want to ask other close stakeholders these questions as well. These conversations will help you develop the appropriate language and feelings to convey in the case statement.

**Use the below worksheet to outline the four components of your case statement:**

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| **Part 1: Introduction**  Who are you and who do you serve? What role do you play in your community? |
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| **Part 2: The Case for Permanent Endowment**  Why is it important for camp’s future to be secure, and how will building your permanent endowment fund help to achieve that goal? |
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| **Part 3: Your Supporters**  Who are your supporters and why do they care? E.g., Our endowment contributors are supporters just like you who believe/want… |
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| **Part 4: Call to Action**  Why should donors participate in your campaign right now? What does it mean to join this group of supporters? |
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# To draft your case statement, consider the following questions:

* What impact has camp had on you personally and in your community?
* What are your organization’s core values? How does your camp program bring those values to life?
* What is unique about what camp provides/offers to your community?
* What are your future aspirations for camp?
* What impact will endowment gifts have on those you serve?

# When drafting your case statement make sure to:

* Write in the active voice. You do not ‘seek to educate’ or ‘hope to engage’, etc.
* Use descriptive words to talk about the impact camp has on your constituents.
* Provoke the reader’s emotions. Make them remember why camp is special to them.
* Focus on what camp has to offer future generations.

# What NOT to do in a case statement. Make sure you haven’t:

* Presented a detailed history of camp.
* Talked about current funding needs.
* Focused on how great your current staff is. The reader already knows!
* Overused words, jargon, or abbreviations.
* Focused on statistics – numbers numb the reader and you want to inspire.
* Written more than one page.