

**SUBJECT**

*Creating a*

*Case Statement for a*

*Jewish Day School*

# table of contents



<b>1. WHAT IS A CASE STATEMENT? AN INTRODUCTION</b>	1
<b>2. GLOSSARY</b>	2
<b>3. PLANNING YOUR CASE STATEMENT</b>	3-4
■ Who Should Work on This?	3
■ Your Budget	3-4
■ Your Schedule	4
<b>4. CREATING YOUR CASE STATEMENT: A STEP-BY-STEP GUIDE</b>	5-12
■ Strategic Development	5
■ Concepting	5-6
■ Writing	6-10
■ Designing	10-11
■ Printing	11-12
<b>5. FINAL ADVICE</b>	12
■ Contacts	12
<b>6. APPENDIX</b>	13-19

# WHAT IS A CASE STATEMENT?

## an introduction

A Case Statement is a dynamic, emotional and inspirational brochure, which serves as the central piece of your fundraising efforts, as well as marketing and communications campaigns. It makes the "case" for your Jewish day school to a potential funder, helping convince that person why your school is one of the most important causes that he or she should be funding. The Case Statement dramatically tells the dream and the mission of your institution, and what place they hold for the future of the Jewish people.

### **There are four basic points about the role of a Case Statement.**

- 1) It presents a "case for giving," encouraging a contributor's support.
- 2) It distills the basic messages of an organization through passionate language and exciting visual images.
- 3) It expresses the personality, style and mission of an organization.
- 4) It can also be used to educate people in your community, recruit students and their families, and inspire faculty and staff.

This handbook was created to support the collaboration among the Boston area day schools, Combined Jewish Philanthropies (*CJP*) and the Partnership for Excellence in Jewish Education (*PEJE*). Its goal is to enhance the success of your school's campaign as well as *CJP*'s Community Capital Campaign by providing you with the information you need to plan, write, design and produce your Case Statement.

Before beginning, there are some important terms that will help you use this handbook most effectively.

# glossary

**CASE STATEMENT:**

A dynamic, emotional and inspirational marketing brochure. (see *introduction*)

**CONCEPT:**

The creative idea or approach behind the execution of your Case Statement. (see *pages 5-6*)

**COMP:**

Short for comprehensive. A rough, black and white or color, stapled sample of the Case Statement. The pictures are examples of what you might want to use, but are not necessarily those to be used in the final brochure. A comp will employ a design (*style, look, fonts*), a cover headline and follow-up headlines for the inside pages.

**COPY:**

Another word for text.

**COPY PLATFORM:**

Detailed outline of the Case Statement's text.

**CREATIVE BRIEF:**

A one to two page summary or outline of the information you compile as part of your internal strategic development. (see *Appendix 1*)

**FONT:**

A typeface. There are thousands of typefaces or fonts available.

**MISSION STATEMENT:**

A brief statement that defines your school's concrete opportunities, competencies and commitments. A mission statement must be simple, clear and direct.

**PROOF OR PAGE PROOF:**

This comes from the printer and is sent to you after the first phase of the printing. You can think of it as a rough draft of a designed brochure. A proof will look very similar to the final product but may have low-resolution (*low scanning quality*) versions of the photographs.

# PLANNING YOUR case statement

## WHO SHOULD WORK ON THIS?

### PROJECT COORDINATOR

A Case Statement is an intense project that takes a significant amount of time. In order for it to run smoothly and efficiently, your first task will be to select one person to oversee the project. The project coordinator will maintain the flow of the project, making sure that deadlines are met and that everyone working on the project is communicating with each other.

The project coordinator will be responsible for creating the team that works on the Case Statement, from the decision-makers to the freelance creative team. The coordinator might be a staff person at your school or a parent on your marketing committee.

### DECISION-MAKING TEAM

The project coordinator will assemble a decision-making team. While this may add time to the project schedule, it is the best way to ensure that your Case Statement is representative of diverse groups, while maintaining a single decision-making body. The team should be small, consisting of *three to four* people. Your team should have both the experience and the authority to approve the budget, the copy and the design of your Case Statement.

## HINT

**Explain your expectations** to your freelancers as clearly and concisely as possible. Make sure they know that you are a nonprofit and that they will need to work under nonprofit-type budget constraints.

## HINT

When you negotiate a freelancer's compensation, you may want to **negotiate a project fee**, rather than an hourly fee, because a project may take longer than you anticipate in your budget.

### FREELANCERS

The project coordinator will hire the freelancers necessary to complete the job and do it well. You will need a writer, a graphic designer and possibly a photographer. Writers and graphic designers work best as a team.

When hiring freelancers, consider asking friends and colleagues for referrals. You can also contact Terry Holzman at CJP for additional recommendations (see *Contacts section, page 12*). Going through a creative temp agency is an alternative, though it will be more expensive. Review your applicants' portfolios and resumes carefully. Make sure that you like their work and that it is consistent with your school's evolving image. Also, confirm that your graphic designer has experience in working with printers and is able to use the three most important graphic design programs: Quark™, Adobe Photoshop® and Adobe Illustrator®.

### YOUR BUDGET

There isn't one right budget for every school. Some will choose to spend more than others. You will have to determine

what type of brochure is right for you, depending on your resources. You should expect to spend somewhere in the range of \$3,000-5,000 for black and white inserts to complement an existing brochure, \$10,000-30,000 for a three-color, simple, but professional-looking brochure and \$30,000-50,000 for a full-color, elaborately designed, new brochure. Costs vary greatly depending on quantity and quality.

## YOUR SCHEDULE

**Plan ahead.** You should expect to spend three to six months developing your Case Statement. The schedule will include preparation work, finding freelance professionals and the approval process. The hypothetical timetable provided in the back of this handbook is only a guide (see Appendix 2). Your individual schedule will vary depending on your priorities and needs. The project coordinator will make his or her biggest contribution by helping to keep your Case Statement on schedule. Be sure that your timetable includes enough time for the decision-making team to review materials. Include time for at least two or three drafts of your document before you go to the final version. The project coordinator should also schedule meetings for critical review stages at least four weeks in advance of each review meeting to ensure their priority.

Attention to your Case Statement's schedule will help your school avoid overtime charges and minimize mistakes caused by rushing.

But remember, even in the best possible situation, some things will go wrong and things will get delayed. This is a normal part of the process.

## HINT

Don't sacrifice quality because of last minute revisions—**plan ahead.**

SAMPLE BUDGET	
<b>Graphic Designer</b>	\$40-100/hour
<b>Writer</b>	\$40-75/hour
<b>Photography</b>	
Photographer per day fees (does not include materials)	\$500-1,000
Stock Photography per image	\$130-1,000*
<b>Printing</b>	
(includes film, paper stock, proofs and is based on a quantity of 2,500)	\$2,500-10,000
<b>Miscellaneous</b>	Varies
(includes messengers, shipping services, travel, internal personnel hours)	
*Also check with CIP for existing photography of your day school.	

The range of your budget should be proportional to your fundraising goals.

Note that to plan your Case Statement budget, you will first need to determine your entire fundraising budget. Include the cost of all resources necessary to plan and implement your fundraising campaign.

# CREATING YOUR case statement



Creating a Case Statement is a step-by-step process.

## STRATEGIC DEVELOPMENT

As you begin to develop materials for your Case Statement, you must first determine your fundraising objectives and how your marketing and communications materials will support those objectives.

You must then systematically define your school in marketing terms, including the audiences that will be targeted.

Your school will likely have already developed its mission statement (see *Glossary*) and educational philosophy. Now is a good time to review them.

You must also determine: Why should a donor support your particular school? Why should a student attend your school? What is your school as an organization "selling"? Some benefits are tangible and some are intangible. The tangible aspects of your school include your classes, curricula, buildings,

facilities, staff and students (*the type of student you attract and graduate*). The intangible aspects of your school include your educational philosophy, your mission, your history, your goals and your contribution to the Jewish future.

These tangible and intangible benefits together are what you want to sell to your

donors, or rather, what you are offering to them as funding opportunities.

Another step in this strategic development is to realistically determine some of your school's shortcomings. Why would someone resist donating to your school? For example, how will you help overcome a parent or donor's feeling that day school students are isolated from the rest of the community? How will you prove that the quality of secular education is never compromised? This exercise will enable you to address anticipated resistances in your Case Statement.

Finally, you should outline the tone, look and feel you want for your Case Statement. Should it be bold or straightforward? Is humor appropriate? What are some of your guidelines, such as logos, slogans and colors? Once you provide this information in the form of a creative brief (see *form in Appendix 1*), concepts for your Case Statement can be developed.



## CONCEPTING

After reviewing your creative brief, request that your writer and graphic designer provide you with two to three dynamic concepts (*creative approaches*) for your Case Statement. Your concepts will arrive as rough comps (*samples*).

Every good Case Statement must have a strong and consistent concept. This idea or approach provides inspiration, as well as information. It pulls a reader into the piece with excitement, dynamism, drama and interest. It is about communicating your message: how

## STRATEGIC DEVELOPMENT

Before beginning to write, first decide:

- **Objective**
- **Target Audiences**
- **Mission Statement/  
Educational Philosophy**
- **Services/ Benefits  
Your School Offers  
(Tangible and Intangible)**
- **Anticipated Resistance  
To Your School's Mission**
- **Tone of Case Statement**

## THE CONCEPT

A concept is an idea which dramatically moves your Case Statement along. An example of a strong Case Statement concept is the one used for Adat Ari Day School in Los Angeles. They wanted to say they were the school with a *balanced curriculum of secular and Judaic studies*. They wanted to attract both committed Jewish families and those who were on the fence, questioning whether a Jewish school would appropriately prepare their child for "the real world." So, the concept they chose was from a comp that employed the idea, "The Union of the Aleph and the A." Throughout the Case Statement, each page visually employed imagery of a Hebrew and English letter. Each headline was a balance—"From Aleph, Bet, Gimmel, to Ions, Eons and Atoms" and "From Abraham, Sarah and Rebecca to Lincoln, JFK and Coretta."

you say it, as well as what you say.

A concept is based upon the strategic information outlined in the creative brief, but it is particularly based on your mission statement. That statement simply and concisely explains what your school is.

The job of the concept is to turn that simple statement into a compelling, moving idea, which begins on the cover and flows through the Case Statement.

The concept you choose will guide your copy in a particular direction. You should provide your writer with a copy platform (*detailed outline of text*) that will include recommendations for the necessary components of your brochure. Your decision-making team should approve the copy platform before giving it to your writer.



### WRITING PART 1: CONTENT

After your decision-making team approves the copy platform, and everyone has had a chance to give input, select one writer to do the writing. Whether you decide to write your Case Statement internally or hire a writer, you will need to share all the information that will be included.

Typically, the sections that make up a Case Statement include:

- 1) *The case for Jewish day school education*
- 2) *Interviews with knowledgeable parties*
- 3) *Your school's history, mission and goals*
- 4) *The Partnership with CJP*
- 5) *Your school's financial needs*

#### 1) THE CASE FOR JEWISH DAY SCHOOL EDUCATION

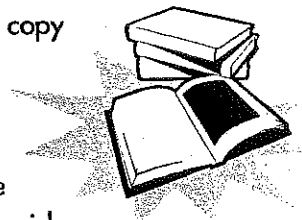
As part of making a case for supporting your school, it is crucial that you make a case for day school education. CJP will share with you the language they have prepared that makes a case for Jewish day school education. The copy may need reworking to flow consistently into your Case Statement.

For additional copy points, consider referring to

the AVI CHAI Foundation's Case

Statement, "The Jewish Investment Portfolio." This

Case Statement is a good resource for information and statistics on day school education. To request a copy, please call the PEJE office at (617) 367-0001.



#### 2) INTERVIEWS WITH KNOWLEDGEABLE PARTIES

There are two reasons to conduct interviews: 1) to gather information and varied perspectives on your school that will enhance the text of your Case Statement, and 2) to directly quote from in your copy.

When quoted in the Case Statement,

# CREATING YOUR

## case statement

the interview should be distilled to three or four sentences. Consider using a photograph of the interviewee in your Case Statement to help bring the quote to life.

You might profile a current student, an alumnus, a parent, a current donor, a board member, headmaster, CJP executive or lay leader. Pick four or five different people. Select interviewees who can impress upon a donor what a wonderful and important place your school is. Try to choose a diverse group in terms of gender and age, and whose length of affiliation time with your school

### HINT

We recommend creating a list of questions and **conducting a live interview** (*over the phone or in person*), rather than simply asking for a general comment and quote from your interviewees. Ask open-ended but targeted questions that steer your interviewee in a specific direction. Listen for comments with depth and emotion. Ask follow-up questions to take your interviewee to the next level.

varies. While it is acceptable to summarize a quotation, simply make sure that your interviewee approves any changes you make to their language.

Reading a quote is an excellent way for prospective donors to get first-hand, enthusiastic testimonials. Suddenly, it is not merely a Case Statement extolling the virtues of a school, but a 10-year-old girl who loves her math and computer science classes. Or maybe it is a parent who is so grateful that a wonderful Jewish education is available for his or her child.

Interview quotes can be used in a number of ways, such as sidebars, photography captions and self-standing

sections. A short self-standing section can add infinite depth and excitement to your Case Statement.

Also, be sure to get a signed release form from each interviewee whose quote or photograph will appear in your Case Statement.

### 3) YOUR SCHOOL'S HISTORY, MISSION AND GOALS

Here is your place to shine! Don't be shy. Sing the praises of your school. Talk about your esteemed history, your successful alumni, your knowledgeable faculty and your dedicated staff. Give some statistics: How many students do you have? What courses do you offer? What percentage of graduates go on to college and yeshiva? What universities have they attended? Describe what makes your school different from others (*i.e., facilities and special programs*). If your school is new, tout its philosophy and vision. You can also talk about what specific challenges lie ahead and how you are working to meet them. No one knows your school better than you do. This section of the brochure is your opportunity to share that knowledge with your prospective donors.

### 4) THE PARTNERSHIP WITH CJP

You may also choose to talk about your partnership with CJP and the Community Capital Campaign, which is supporting Jewish day school education.

CJP has copy that clearly explains its five-year, multi-million dollar commitment to Jewish day school education and the

unique collaboration in the Boston community. Please contact Terry Holzman at CJP, (617) 457-8629, for the copy.

## 5) YOUR SCHOOL'S FINANCIAL NEEDS

One of the key sections of the Case Statement is the "ask." Whether your school has embarked on a capital campaign, an endowment campaign or you are expanding your annual campaign efforts, you will want to describe your specific financial needs.

Aside from a short, concluding "call-to-action" in your Case Statement, where you address your donors directly and ask for their support, it is recommended that the sections on your school's financial needs and donor recognition opportunities be removable inserts.

If your school is conducting a capital campaign, the insert should include all naming opportunities, beginning with the campus or building, and including interior and exterior facilities and furnishings (see Appendix 3 for more detailed "Campaign Insert").

Increasingly, schools engaged in capital campaigns are also undertaking endowment campaigns. Other schools are embarking on an endowment-only campaign. A second insert, specific to the endowment campaign, should also be included in your Case Statement (see Appendix 4).

Finally, the annual campaign will

## HINT

While you're writing, keep in mind **donors' resistances** to supporting you. Why might they not want to give to your school? By responding to their concerns, you engage your prospective donors, making them feel like you are speaking directly to them and increasing the likelihood that they will make a gift.

require its own insert. Annual needs for general and designated purposes should be listed (see Appendix 5).

One or all of these inserts should include information about any donor recognition systems you may have. Perhaps contributions of a certain amount qualify individuals for certain donor categories (e.g., the Gold, Silver and Bronze levels of giving) or other levels of recognition.



## WRITING PART 2: PASSION

Hiring a professional writer with the skills and experience to communicate your message is the best way to ensure dynamic language in your Case Statement. Because this might not be possible, the following few paragraphs will give you some insight into writing with passion.

### A SINGLE VOICE

Select one person to do the writing. Your Case Statement, as with any written document, should speak in a single voice. If different people write different sections, make sure that the official writer integrates these sections into the single voice of the rest of the piece.

### HEADLINES

When writing your Case Statement, begin with your headlines and concept. From these headlines, develop sub-headlines for each section of your piece. These sub-headlines should be dynamic (with active verbs and words ending in "ing," e.g., "Educating Future Leaders") and

# CREATING YOUR

# case statement

## HINT

**Writing for your audience.** A Case Statement is not an annual report, a grant proposal or an academic thesis and shouldn't sound like it. Your audience—prospective or current donors—wants to read something that is emotional, but more importantly something clear and as concise as possible. Your copy must be easy to read and to the point.

should be supported by the copy. As you write, try to tie together the sub-headlines and the first lines of copy. This will help to bring your readers into the story better.

## ATTENTION SPAN

Consider your own attention span and what you find interesting to read. Although facts and statistics are important, and should be included, people enjoy reading first-hand accounts such as interviews and quotations. As discussed earlier, reading that a school is sending many students to top colleges is not as interesting as reading about alumnus Josh Cohen (*perhaps a*

*scholarship student*) who just graduated from medical school and is a committed member of his Jewish community. Put the interviews in the front of your Case Statement to capture the attention of your reader.

Follow them with further details about your school. This is referred to as **inspiration before information**.

## SUCCESSSES

Avoid grandiose or trite statements such as "our school is changing the entire Jewish world" or "at our school, we believe our stu-

dents are special." Instead, describe *how* your school is effecting change in the Jewish world and *how* your students are special.

## END WHERE YOU BEGAN

Think of your copy as a circle. You want your readers to feel that the beginning and end are linked. For example, if you start your Case Statement with a Talmudic quote or parable, bring your conclusion back to it. That way the information seems more compelling.

## READING OUT LOUD

While you write, read your copy out loud. When you read copy out loud, you notice problems that you wouldn't have if you only read copy silently. Reading out loud is also crucial to infusing the words with passion.

## EXCLAMATION POINTS

Never use an exclamation point in a headline or sub-headline. A Case Statement is not a flyer for a banquet or concert. Gratuitous exclamation points do not emphasize your point—they trivialize your message.

## PROOFREADING

Make sure that at least two people other than the writer proofread the text for typos BEFORE a final draft is set. The Case Statement will still have to undergo minor changes after it is in the brochure format (*because copy will look and sound differently once it*

## HINT

Proofread—so typos don't get by you.

Ideally, all of your marketing materials will work together, using similar design elements. This is a long-term goal, but start now. You need an **integrated image**. Even though your Case Statement may be the most professional-looking of all your pieces, you should try to incorporate some of the best elements of your other materials. Consider whether or not your office materials (i.e., letterhead, business cards, pledge cards, etc.) match this piece and each other. Is it time to redesign those as well?

is surrounded by pictures and visual treatments). The more typos you catch ahead of time, the more time you save your graphic designer.

## WORDS TO AVOID

Some words or expressions used in everyday conversations in the Jewish world can make your materials sound less professional. Avoid all idiomatic and colloquial speech, including Yiddish expressions.

## STEP 3

### DESIGNING

After the copy is written and approved, it is time to implement the design. You will already have a preliminary design from the Case Statement concepts you received. The chosen concept will now be developed into a whole brochure. At this time, you will need to hire a professional graphic designer. The following are some items to guide your discussion with the designer.

### THE FORMAT

There are three basic types of Case Statement formats (see Drawings 1, 2, 3). The most common format (#1) is bound on one side and looks like a little booklet. A second option (#2) has a pocket with removable sections. The third format (#3) combines elements of the first two and is a booklet that includes a pocket on the inside back cover.

The advantages of the booklet are that it is less expensive to

print and the parts are all connected in one easy-to-read piece. The pocket options have a longer life because, as information changes, these sections can be updated and replaced at minimal cost. They also can be customized for specific donors (i.e., you have separate sections on your annual campaign and your endowment campaign so that you can use one or the other for donors with different giving capabilities).

### THE SIZE



Your Case Statement should be a standard size—8.5" by 11" is recommended unless you choose to include a pocket, in which case it should be 9" by 12" to accommodate 8.5" by 11" inserts. Both of these sizes will fit in standard envelopes.

The length of a Case Statement varies. A good average is 12 pages plus the cover. A Case Statement fewer than eight pages may be too short, greater than 16 pages will be too long. If you choose the booklet option with standard saddle-stitch binding, your Case Statement will have to be designed in increments of four pages—this is a printing issue. While you could choose another binding option such as ring wire, spiral bind or plastic comb binding, saddle-stitch is generally least expensive and your best bet.

# CREATING YOUR case statement

## PHOTOGRAPHY



For an exceptional Case Statement, you will need exceptional photography. Your prospective donors want to feel your school, not just read about it. Do not let the photography be an afterthought.

The most desirable course of action is to hire a photographer. Stock photography (*existing photography available for purchase*) is acceptable to use and can be less expensive than bringing in a professional. One useful online stock resource is Photodisc.com. At this site you will find numerous royalty-free images (*meaning once you buy them you can use them as much as you want*) and links to other stock photography resources.

We strongly advise that you not use snapshots taken by amateur photographers. The less professional the photography, the less seriously the Case Statement will be taken.

## FONTS

Select one, or at most two, different fonts for the entire piece (*using a different font for headlines*) to give your Case Statement a consistent feel. Be sure your fonts reflect the tone of your school and are consistent with the look and feel of all the school's fundraising and marketing materials.

## HINT

**The marriage of art and copy.** Your design should support and complement your copy. Ask yourself, does the design on this page emphasize or detract from the message being communicated? If it detracts from your copy, change the design.

## COLOR



You will want to have some color in your brochure. Although there are countless options, you should probably select a two-color brochure (*such as black, blue and white, where white is the color of the paper*) or a four-color brochure (*full color*)

for your Case Statement. The more colors, the more expensive the printing costs.

## STEP



## PRINTING

## PAPER

Generally, photography looks better on coated paper. Ink tends to saturate uncoated paper and look washed-out. You can use a gloss or a dull coat, depending on taste and style. It is recommended that you use bright white paper for your Case Statement. Text on colored paper is more difficult to read. The paper for your cover will be different from the inside pages. Consider a 65 pound or an 85 pound "cover stock" for the cover and an 80 pound or a 100 pound "text stock" for the inside pages. Your printer can furnish you with paper samples to compare.

## PRINTERS AND PRINTING

A printer can make the difference between a good and a bad Case Statement. Find a printer with a good reputation. Many graphic designers have printer contacts and will recommend someone with whom they have worked.

Make sure that before you get estimates from printers, you have decided on the size, number of pages, color, paper

## HINT

stock and quantity. You must give exactly the same information to each printer to make an accurate comparison. Request to see a proof of the job before printing, and tell the printer this when you get a price quotation. Review quotes from three different printers before selecting one.

The proof you see will be either a matchprint or a blueline. A matchprint is a true example of what the final brochure will look like. A blueline is a proof taken from the film to be used in the printing of the job. When you review this proof it will be the last time you will be able to make changes. Re-read the entire Case

Don't allow **your printer** (or any vendor) to bill you for more than they originally quoted you without having received approval beforehand. Many printers have a +/- 10% of bottom line charge policy—make sure to ask about this up front.

Statement. Check the pictures, the logo and your contact information. One wrong number in your phone number could be disastrous. Look for "hickeys" (scratches or imperfections). Make sure you are completely satisfied with how everything looks before signing off on the job. Do not hesitate to ask your printer any questions.

## FINAL ADVICE

Your Case Statement is an important and influential piece, but it cannot raise money by itself. Only when used by an experienced fundraiser or lay leader in conjunction with an organized fundraising campaign, will the Case Statement work to its full potential. Allocate energy and resources to all components of your campaign. The Case Statement, as one piece of your bigger fundraising campaign, is a great place to start.

Begin the planning stages of your fundraising campaign and Case Statement now. Start assembling your decision-making team, lining up your freelance staff and developing your strategic points.

Remember, developing a powerful and effective Case Statement can be hard work

and time consuming, but it can also be fun. The rewards are well worth the effort. Good luck.

### CONTACTS

If you have questions or need help, please don't hesitate to address them to Rabbi Joshua Elkin or Herb Tobin at PEJE at (617) 367-0001. If you have specific questions about the Combined Jewish Philanthropies campaign, contact Beth B. Raffeld, V.P. Development, Community Capital Campaign, at (617) 457-8578. For resources such as writers, designers and printers, or to borrow photographs, contact Terry Holzman, V.P. of Marketing & Communications, at CJP, (617) 457-8629.

# appendix

**1. CASE STATEMENT CREATIVE BRIEF FORM**

**2. SAMPLE TIMETABLE**

**3. SAMPLE CAPITAL CAMPAIGN OPPORTUNITIES INSERT**

**4. SAMPLE ENDOWMENT CAMPAIGN INSERT**

**5. SAMPLE ANNUAL CAMPAIGN INSERT**

## APPENDIX 1: CASE STATEMENT CREATIVE BRIEF

You can use this form to compile your strategic development information.  
(see STEP 1: Strategic Development, page 5)

<b>Date:</b>	<b>Project Title:</b>	<b>Project Coordinator:</b>
--------------	-----------------------	-----------------------------

**ASSIGNMENT** *Description of project (e.g., create a case statement, print ad, invitation, etc.)*

**OBJECTIVE** *Project's desired results (e.g., increase awareness)*

**TARGET AUDIENCES** *To whom are we talking?*

**MISSION STATEMENT** *Your school's opportunities, competencies and commitments*

**EDUCATIONAL PHILOSOPHY** *Your school's views on Jewish and secular education*

**SERVICES/BENEFITS YOUR SCHOOL OFFERS** *Tangible, intangible?*

**ANTICIPATED RESISTANCE TO YOUR SCHOOL'S MISSION**  
*Obstacles/problems this project needs to overcome*

**TONE OF YOUR CASE STATEMENT**  
*Attitude/look/feel of the material to be created (e.g., funny, emotional, bold, edgy, etc.)*

**MISCELLANEOUS GUIDELINES** *Use of logos, taglines, legal disclaimers, fonts, black and white vs. four color, etc.*

## APPENDIX 2: SAMPLE TIMETABLE

	Wk of Jan 1	Wk of Jan 8	Wk of Jan 15	Wk of Jan 22	Wk of Jan 29	Wk of Feb 5	Wk of Feb 12	Wk of Feb 19	Wk of Feb 26	Wk of Mar 5	Wk of Mar 12	Wk of Mar 19	Wk of Mar 26	Wk of Apr 2	Wk of Apr 9	Wk of Apr 16	Wk of Apr 23	Wk of Apr 30	Wk of May 7	Wk of May 14
<b>Hypothetical Case Statement Development Steps and Timetable</b>																				
1 School conducts strategic development																				
2 Determine decision-making team																				
3 Determine local vendors (e.g., graphic designer, printer, writer, photographer)																				
4 School writes and reviews creative brief (see Appendix 1)																				
5 Concept and copy platform developed																				
6 Concepts reviewed and approved by decision-making team																				
7 Approved concept shared with local designer and writer																				
8 Writer writes first draft of copy																				
9 School reviews first draft of copy																				
10 Photography shoot, if needed																				
11 Photography reviewed; picks made																				
12 Writer writes second draft of copy																				
13 School reviews second draft of copy																				
14 Writer writes final draft of copy																				
15 Designer creates proof with final copy and reviews with team																				
16 Designer or school representative gives proof and photography to printer																				
17 Printing																				
18 Review final case statement																				
* Schedule these meetings (4) weeks in advance																				

■ — Development Process

▨ — Approval Stages

\* — Schedule

Note = Timetables will vary for each individual school.

**APPENDIX 3: SAMPLE CAPITAL CAMPAIGN OPPORTUNITIES INSERT**

Name of School: \_\_\_\_\_

Name of Campaign: \_\_\_\_\_

**CAPITAL CAMPAIGN NEEDS - BUILDING DEDICATION OPPORTUNITIES**

Use this template for a capital campaign as a guideline to create an insert for your Case Statement. It has been developed for illustration purposes only. Your capital campaign needs insert should reflect the concept (*creative approach*) of your Case Statement.

*(List in descending donation amount order)*

DEDICATION OPPORTUNITIES	DONATION AMOUNT
<b>CAMPUS</b>	\$ _____
<b>BUILDING</b>	\$ _____
<b>WINGS/MAJOR SECTIONS OF THE BUILDING</b>	\$ _____
<b>MAJOR AREAS</b>	\$ _____
Auditorium	\$ _____
Gym	\$ _____
Dining Area	\$ _____
<b>CLASSROOMS</b>	\$ _____
<b>TECHNOLOGY CENTER</b>	\$ _____
Computer Stations	\$ _____
Equipment	\$ _____
Reference Material	\$ _____
Online Access	\$ _____
<b>LIBRARY</b>	\$ _____
Book Collections	\$ _____

**DEDICATION OPPORTUNITIES**

**DONATION AMOUNT**

**BEIT MIDRASH**

Religious Objects

**OUTDOOR FACILITIES AND SPACES**

Entry Circle

Playground

Gardens

Sukkah Area

**GENERAL AREAS**

Lounges

Reception Area

Elevators

**CATEGORIES FOR SMALLER DEDICATION GIFTS/  
PLAQUES FOR WALL OF HONOR**

\$ \_\_\_\_\_  
\$ \_\_\_\_\_  
\$ \_\_\_\_\_  
\$ \_\_\_\_\_  
\$ \_\_\_\_\_  
\$ \_\_\_\_\_  
\$ \_\_\_\_\_  
\$ \_\_\_\_\_  
\$ \_\_\_\_\_  
\$ \_\_\_\_\_  
\$ \_\_\_\_\_

**Note: Include specialized furnishings for any of the above spaces as separate giving opportunities**

**APPENDIX 4: SAMPLE ENDOWMENT CAMPAIGN INSERT**

Name of School: \_\_\_\_\_

Name of Campaign: \_\_\_\_\_

**ENDOWMENT CAMPAIGN NEEDS - ENDOWMENT OPPORTUNITIES**

Use this template for an endowment campaign as a guideline to create an insert for your Case Statement. It has been developed for illustration purposes only. Your endowment campaign needs insert should reflect the concept (*creative approach*) of your Case Statement.

**ENDOWMENT OPPORTUNITIES**

**DONATION AMOUNT**

**PROGRAMS**

ENDOWMENT FUNDS FOR A DEPARTMENT

\$ \_\_\_\_\_

ENDOWMENT FUNDS FOR A PROGRAM

\$ \_\_\_\_\_

*(Academic and Extracurricular)*

SCHOLARSHIPS/FINANCIAL AID

\$ \_\_\_\_\_

LECTURE SERIES

\$ \_\_\_\_\_

**PERSONNEL**

DIRECTOR

\$ \_\_\_\_\_

FACULTY POSITIONS

\$ \_\_\_\_\_

**BUILDING**

ENDOWMENT FUNDS

\$ \_\_\_\_\_

*(for Maintenance or Expansion of Current Facility)*

**UNRESTRICTED ENDOWMENT**

\$ \_\_\_\_\_

**LIFETIME GIVING OR PLANNED GIVING**

Wall of Honor Giving

**Example Amounts**

Founder \$1,000,000

Patron \$500,000

Sponsor \$10,000

Giving Society

Lions of Judah \$1,000,000

Doves of Peace \$500,000

**APPENDIX 5: SAMPLE ANNUAL CAMPAIGN INSERT**

Name of School: \_\_\_\_\_

Name of Campaign: \_\_\_\_\_

**ANNUAL CAMPAIGN NEEDS - DESIGNATED OPPORTUNITIES**

Use this template for an annual campaign as a guideline to create an insert for your Case Statement. It has been developed for illustration purposes only. Your annual campaign needs insert should reflect the concept (*creative approach*) of your Case Statement.

**DESIGNATED GIVING OPPORTUNITIES**

**DONATION AMOUNT**

**PROGRAM FUNDING**  
*(Academic and Extracurricular)*

\$ \_\_\_\_\_

**STAFF FUNDING**

\$ \_\_\_\_\_

**SCHOLARSHIP FUNDS**

\$ \_\_\_\_\_

**TECHNOLOGY UPDATE FUNDING**

\$ \_\_\_\_\_

**ANNUAL DONOR GIVING CATEGORIES**

Your school may have donor recognition systems that recognize contributions of varying amounts. This insert can include details about these categories.

**EXAMPLES:**

**GIVING CLUBS**  
*(e.g., Gold, Silver, Bronze)*

\$ \_\_\_\_\_

**SPECIAL FUNDS**  
*(e.g., Benefactor, Patron, Supporter)*

\$ \_\_\_\_\_

**FOUNDER CATEGORIES**  
*(e.g., Founder, Trustee, Builder)*

\$ \_\_\_\_\_



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