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Washington**

# Fundraising 101 Toolkit

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# Fundraising 101

## **Importance of Fundraising:**

Nonprofit organizations deliver programming and services for community benefit. Seeking resources to support the organization’s programs, services, and daily operations can often seem challenging. In this toolkit we present several strategies for a nonprofit to consider related to the art of seeking funding and how to leverage the existing resources within the organization to promote sustainability.

## **Strategies**

Fundraising builds strong relationships between a nonprofit organization and the entities/ individuals that provide contributions (money or in-kind services). It is an essential component of a nonprofit’s sustainability plan.

## **Shaping The “Ask”**

The easiest way to get money is to ask for it. This “Ask” could be in the form of a grant request, direct appeal, donor engagement, or fundraising event. Review [templates for Case and Need Statements](#) to help shape your request. There are several considerations to think about when navigating this process including:

- Are we ready to do this?
- How do we prepare for the “Ask”
- Which “Ask” produces the best results
- The work involved in preparing the “Ask”
- Typical results
- The Return on Investment (how much money or support will your nonprofit receive)

Let’s explore each of these areas a bit more based on the type of “Ask”:

**Grant Requests:** There are many types of grants available to nonprofit organizations. Grants are a great way to diversify your organization’s fundraising strategies.

Questions	Key Considerations	Timing	Winning Strategies
<a href="#">Are we ready to do this?</a>	What is it that you are planning to request funding for?	When is the grant due?  Do you have enough time to prepare the grant request (1 – 3 months is a good target. You may need more time if the grant is more complex).	Outline your request for funding. What is your need statement?  Review the funding announcement to determine due date and requirements.
<a href="#">How do we prepare for</a>	Is your organization	Create a grant	Review the funding

the "Ask"	<p>eligible to apply for the grant funding?</p> <p>Is your request something the grant funder is interested in supporting?</p>	<p>calendar to outline who is preparing which section of the grant proposal. Outline writing assignments and internal due dates (when draft documents are due to be reviewed).</p> <p>Outline external due dates (date and time the proposal is due).</p>	<p>announcement to determine eligibility requirements, due dates, and requirements.</p> <p>Create the outline and templates for the grant request by making a document that contains all the questions you'll need to answer to apply for the grant.</p>
The work involved in preparing the "Ask"	Who will be preparing and submitting the grant?	Set aside more time than you think you will need to prepare the grant request. If you have an hour set-aside on your calendar, double the time so you have a two hour block.	Block off your calendar to have dedicated time to prepare the sections of the grant response. Work with your team (staff, volunteers, Board members, etc.) to review the draft grant and offer feedback.
Typical results from Grant requests	Grant seeking is a competitive process. Average success rate varies (10-30%) and is based on many factors.	Sponsor review of grant requests and the awarding of funds could take several weeks to several months.	Review the funding announcement and highlight how many awards the sponsor is funding and when the funds will be awarded.
The Return on Investment (how much money or support will your nonprofit receive)	The amount of funding or support your organization will receive from a grant request varies.	Receiving funds from grants could take several weeks to several months. The average success rate in receiving a grant is between 10 – 30%.	Review the funding announcement and the funder's website to see what programs they are interested in funding and have funded.

**Direct Appeal:** A direct appeal is a letter requesting funding support. This letter is sent to donors in the mail or by email. This is another great way to diversify your organization's fundraising strategies.

Questions	Key Considerations	Timing	Winning Strategies
Are we ready to do this?	What is it that you are planning to request funding for?	Create an annual calendar outlining when you would like to send out your appeal letter and how many times you would like to send out the letter (once per year, twice per year, etc.)	Develop a need statement. Outline what you need funding for and how much money you need.  Update your contact list. Do you have people that you could send this letter to?
How do we prepare for the "Ask"	Outline the need and how much funding you are requesting.	What date do you want to send the direct appeal letter?  Mark this date on your calendar	Draft the appeal letter (estimated time 2 – 3 weeks). Include images/pictures and compelling facts and testimonials.
The work involved in preparing the "Ask"	Decide who will be drafting the appeal letter. Will this be the Executive Director, a Board Member, a client you have helped, etc.?	Set aside time on the calendar to review the appeal letter. Share the letter with Board Members to ensure things are clear and compelling. Allow 1-2 weeks for review and feedback.	Block off your calendar to have dedicated time to draft the appeal.  Make it easy for people to give money to your organization. Do you take credit cards, can they donate through your website, can they give a monthly gift, etc.
Typical results from Direct Appeal requests	Direct Appeals are a great way to highlight the work your organization is doing and also provide some monetary support for your work. Email appeals have a lower success rate than direct mail appeals. Anticipate a 5% success rate.	One of the advantages of a direct appeal approach is that money can be received in a short period of time and can be directed to the stated need in the appeal letter (program area or general operating support, etc.).	Direct appeals provide visibility to the work your organization is doing and can also create relationships with new and existing donors.  For everyone that gives a gift (regardless of the dollar amount) send a handwritten thank you note thanking them for their contribution.
The Return on Investment (how much money or support will your nonprofit receive)	This is a proven strategy to raise funds in a short period of time.	The work that goes into preparing the appeal letter is oftentimes less intensive than	In addition to getting funds quickly, you are sharing the great work your organization is doing while establishing

		developing a grant proposal and a direct appeal campaign can be launched in a relatively short period of time.	trusting relationships with donors. This is a win-win-win scenario.
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**Donor Engagement:** Engaging with donors is a great way to invite them to join you in the work that your nonprofit is doing. They get an opportunity to join your team and support your work. The “Ask” is an important step in the relationship-based fundraising process.

Questions	Key Considerations	Timing	Winning Strategies
Are we ready to do this?	What is it that you are planning to request funding for?	You can build your potential donor list at any time.	<p>Make a list that outlines who could be a potential donor to your organization.</p> <p>Refer to your need statements.</p> <p>Do you know what issues/causes they are interested in supporting?</p>
How do we prepare for the “Ask”	Outline the need and how much funding you are requesting.	Create a winning engagement opportunity: Set-up a date (or a few dates) where potential donors and donors could meet with you and tour your facility.	Prepare 2-3 stories for this donor event. These stories should emphasize how the work you are doing is creating an impact in the community. Include compelling facts and testimonials.
The work involved in preparing the “Ask”	Decide who will be speaking at the donor event (s). Will this be the Executive Director, a Board Member, a client you have helped, etc.?	Set aside time on your calendar to plan this event. Schedule the event date(s).	<p>Block off your calendar to have dedicated time for event planning.</p> <p>Plan to offer snacks and beverages (people are more inclined to donate if they are in a comfortable environment with food).</p>
Typical results from Donor Engagement	Donor Engagement involves building	Donor Engagement takes time but is a	Relationship building is a key component of

	relationships and inviting people in to help your organization. These donors may not be able to provide the direct services your nonprofit provides but they could support you with donations of money or their time. Donor gifts may vary in value.	great way to provide ongoing support for a nonprofit organization.  For every donor/potential donor it is important to have ongoing consistent communication at least a few times per year.	donor engagement.  Keep in touch: <ul style="list-style-type: none"> <li>Send donors/potential donors a handwritten thank you note thanking them for their contribution.</li> <li>Send them an email or article about the work your organization is doing.</li> <li>Invite them to have coffee.</li> </ul>
<a href="#">The Return on Investment (how much money or support will your nonprofit receive)</a>	This is a proven strategy to raise funds and build strong relationships. Donor cultivation is also an important part of a major gift campaign.	The work that goes into cultivating relationships with potential donors/donors is priceless and will help build an ongoing funding source and volunteer base for your organization.	In addition to providing a sustainable source of funding and resources for your organization, you are sharing the great work your organization is doing while establishing trusting relationships with donors. This is another win-win-win scenario.

**Fundraising Event:** There are some donors that will only show up to support your organization at events. These events could be a simple pancake breakfast or a dinner gala with an auction.

Questions	Key Considerations	Timing	Winning Strategies
<a href="#">Are we ready to do this?</a>	<p>What is it that you are planning to request funding for?</p> <p>Do you have event type in mind? Remember this event should be FUN.</p> <p>Think of the event size. And consider the pros and cons of a smaller event vs a large event.</p>	An event could take weeks to several months to plan. Look at your calendar and decide the timing of this event.	<p>Make a list of potential donors that you would like to invite to the event.</p> <p>Outline the venue and the cost to host the event.</p> <p>Think of how you are going to advertise the event.</p> <p>Are you planning to sell tickets ahead of time?</p>

			What issues/cause are you going to highlight at the event?
How do we prepare for the “Ask”	Prepare the event invitation and highlight the cause you are raising funds for	Decide on the event date and venue	Prepare 2-3 stories for this donor event. These stories should emphasize how the work you are doing is creating an impact in the community. Include compelling facts and testimonials.
The work involved in preparing the “Ask”	Decide who will be speaking at the fundraising event (s). Will this be the Executive Director, a Board Member, a client you have helped, the mayor, a local legislator, etc.?	Set aside time on your calendar to plan this event. This could take a few weeks to plan or several months.	Block off your calendar to have dedicated time for event planning.  Plan to offer good food and beverages at the event. People are more inclined to give if they are in a comfortable environment with food).
Typical results from Fundraising Events	Fundraising events are time intensive to coordinate and usually have costs associated with them related to setting up and hosting the event. Donor gifts will vary in value.	A fundraising event is a great way to create a memorable experience for attendees and provide ongoing support for a nonprofit organization.	Relationship building is a key component of a fundraising event. Keep in touch: <ul style="list-style-type: none"> <li>• Send donors/potential donors a handwritten thank you note thanking them for attending the event and their contribution.</li> <li>• Send them an email or article of the work your organization is doing.</li> <li>• Invite them to have coffee.</li> </ul>
The Return on Investment (how much money or support will your nonprofit	This is a proven strategy to build strong relationships while also raising funds.	The work that goes into planning a fundraising event is well worth the investment in	In addition to providing funding for your organization, you are sharing the great work your organization is



receive)		cultivating relationships with potential donor(s). This event will also highlight the ongoing work your organization is doing.	doing while establishing trusting relationships with donors. This also highlights your organization's impact in the community.
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### **Build a Fundraising Team**

When thinking about fundraising, whether for the organization, a project, or continued sustainment for the organization, building a team is a great investment.

### **Ideas for Your Fundraising Team:**

#### **The Executive Director and Leadership Team**

- Look at your leadership team, your Executive Director, and Board Members. These individuals are visionaries of the organization. They know the mission and vision so they are the ideal face of the organization.

#### **Staff Members and Volunteers**

- Invite your staff and volunteers to be part of the fundraising team. Assign staff/volunteers to lead this committee and choose fundraising tasks and responsibilities.

### **Creating a Fundraising Action Plan**

An action plan can help you outline your fundraising goal. In getting your action plan together, consider the following questions:

#### **Questions to consider:**

- What resources do we need in our organization (money, volunteers, training, etc.)
- How much money do we need to raise?
- What did the organization do in the past to raise money for a project?
- Grants – How many grants did you apply for and/receive?
- How much did you receive from the grants you applied for?
- Were they State or Federal or Community grants?
- How much time and effort did they take?
- What worked and what did not?
- Events – How many fundraising events did you have?
- How much did they cost and how much did they raise?
- How much time and effort did they take?

- What worked and what did not?
- Mailings – What kind of mailings did you use?
  - Did you use traditional ways, or did you send emails or other digital mailings?
  - How many people did you reach?
  - Did you get responses from the mailings?
  - Did you receive any gifts?

**Analyze your questions and responses:**

Based on your questions from above, determine what worked and what needs to be changed?

**Write Your Plan**

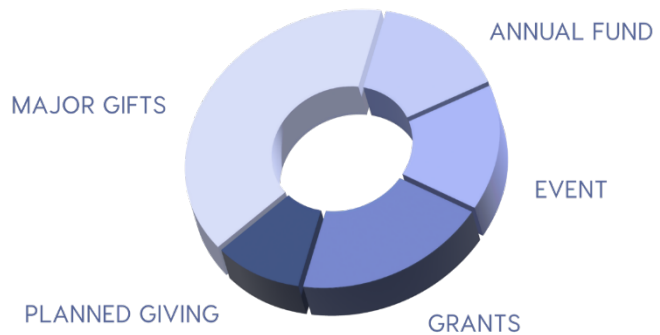
1. Do you want your fundraising campaign to be a year long/annual event?
2. Do you want to raise funds for annual programs and operational needs?
3. Write down your goals, for example you need to raise \$5000.00 to buy equipment for the playground.
4. For each goal, write down the necessary action steps. For example, you will have two events to raise this \$5000.00.
5. For each goal, you will annotate as to who is responsible to achieve this goal.
6. You can then go further and create a budget for this goal.
7. Create a timeline to help you accomplish this goal.



**Sample Fundraising Revenue Pie**

**Raising Funds**

Outlining your revenue pie (the areas that you plan to focus on in your fundraising plan is an important part of the fundraising process.



**Annual Fundraising**

While many organizations believe that fund raising is only for programs or projects, if you do not run fee for services programs, you may need to support daily operational costs. While annual funds help you financially, they can also help cultivate donor relationships.

**Ways to Facilitate Fundraising**

**Ask Your Board Members to Fundraise**

Board Members are a great way to launch and expand a nonprofit’s fundraising mission. Discussing your fundraising goal with board members encourages them to be involved and to help support the organization’s mission. If you don’t have board members for your organization, review our [sample Board Member Invitation Letter](#).

Cultivate your board members. As Linda Kaye Briggs from the Briggs Group noted, cultivate

the three “A”s.

Act as ADVOCATE:

- Be comfortable with your “impact speech”.
- Understand the full scope of your Vision and Mission.
- Understand why you give and support your organization.
- Make it personal and share your impact story.

Act as AMBASSADOR:

- Promote giving and connect donor prospects.
- Invite guests to events or office gatherings, etc.
- Invite donor prospects to events and introduce them to staff.
- Help staff get to know donors better.

Act as ASKER:

- Help open the door, make a phone call to connect with a potential donor that may lead to a gift approach.
- Partner with staff on a gift approach.
- Share your passion about your organization

### **Cultivate Your Donors and Research your donor base**

Your donor database may have a list by different tiers. For example:

- Tier 1- they are the largest funders and provide more than 50% towards your annual fund.
- Tier 2- they provide 30% of your annual fund and they can be a combination of middle sized donations.
- Tier 3- they provide 20 percent of your annual fund and are made up smaller donations.

### **Things to consider when looking at donors in your database**

- Is the donor a member of your board?
- How are they affiliated with your organization?
- What is their history of giving to nonprofits?
- What is their background?
- Do their interests and values match your organization’s mission and vision?
- Is the donor philanthropically motivated?

### **Donor Fundraising Software**

Invest in an electronic solution. With the right software, your organization can reach many donors. More and more nonprofits are relying on fundraising software to do your annual appeal. You can customize your letters, set up digital online payment, lump-sum payments, monthly payments, and text payments. Many software systems have made it easy to transmit your annual appeal through a number of platforms to include your social media, website, email and text.

### **Tell Stories**

Share success stories of people you have helped. You can tell success stories in videos and pictures. Telling stories and connecting them to a specific program or service you offered makes the story memorable with a sense of purpose which leads to donor contribution.

### **Fundraising Events**

Investing your time and resources in hosting an annual fundraising event can bring in much needed dollars. These events can be a great way to engage your donors and the community and promote your cause and organization. You can connect an event to a time of year, for example a spring charity gala, or a winter donor celebration gala. Other examples of events include a silent auction, golf tournament, a fun run for cause, a chili cookoff, and the list goes on.

### **Show Gratitude**

Send out thank you fundraising letters and thank you note is still valuable. In this day of electronics, the old-fashioned way of handwriting notes shows a donor that you care about their help and assistance and encourages them to continue their participation in your organization.

### **Launch a Crowdfunding Campaign**

You can use crowdfunding software to raise funds quickly for a needed project. This kind of platform allows supporters and donors to give small to large amounts quickly online to support a specific project.

### **Ask for Sponsorships**

Seek your local businesses to support your cause. Make it beneficial to a business to participate in sponsorship. For example, have an event at your favorite restaurant on a specific evening for which the business will donate all or part of the proceedings of the event to your organization. This helps the business and helps you.

### **Resources**

Here are some additional resources to help your organization with their fundraising efforts.

[Association of Fundraising Professionals \(training resources\)](#)

[Susan Howlett, Author of Boards on Fire](#)

[Sample Board Letter Template](#)

[Case Statement and Need Statement Template](#)

## **Board Member Invitation Letter Template**

Name           Enter the date  
Company Name   Recipient Name  
Address        Organization Name  
                  Organization Address  
  
Telephone      CC/BCC Block:  
Email

Dear [Recipient Name]:

I hope this letter finds you well. My name is [Name] and I am writing on behalf of my organization, [Organization Name], to invite you to join our Board of Directors as we look to establish a diverse and skilled board of community members who understand the unique challenges facing [Population served].

[Organization Name] is a [Summary of your org, i.e. youth service organization] that offers [Brief summary description of what your organization offers]. Since starting our program [Number of years ago that your org was started], we have [Statistic about your organization's impact and reach. For example: "supported several summer youth camps attended by over 200 children"]

[Personalized Reason for reaching out to this particular person. What motivated you to contact them, and why do you think they're a good fit for your board? For example: "Given your historic support of this work and organizations like ours..." and/or "With your knowledge of what barriers exist for youth in our community and your leadership of [insert area of expertise] I believe your skills and wisdom will bring invaluable insight into our work now and for years to come as we work together to build and expand [organization name]."]

At this time, membership on our Board of Directors is [Voluntary, paid, or other description of compensation]. Board members should expect to donate up to [X] hours of their time each month to participate in [Activities your board members will participate in. Examples might include: monthly board meetings, ongoing strategic planning, and fundraising initiatives.]

As you consider this position, please review the [Describe what documents you are including, if any] that describes our program in more detail. Additional information can also be found at [Website URL].

I hope to have your decision by [Date]. If you have any questions, please feel free to reach out to me via telephone or email. I can also hold space to meet with you either in person or virtually. Thank you for your time and consideration, I look forward to speaking more with you.

Sincerely,

[Name]

*Position*

[Organization Name]

## **Case and Needs Statements**

### **What is the purpose of a case statement?**

A case statement, often used as part of direct appeal, donor engagement, or fundraising events, should share the most important, at-a-glance information about your non-profit organization. It should share impactful data that illustrates the effectiveness of your work. Essentially, it should summarize your organization and give compelling reasons why you deserve funding.

### **Guiding questions to think about when developing a Case Statement:**

- How does your organization help people?
- Who do you help?
- What vital services do you offer?
- What is your organization's track record?
- What are your plans for the future?
- How do you use your money?
- Why do you deserve support?
- How is your org different from others that do similar work? / What makes you stand out?

### **Elements to include in a case statement:**

- Your mission and vision
- Explanation of your programs
- History of your organization
- Outcomes and stories that show proof of your impact
- Financial needs
- What is the purpose of a needs statement?
- The needs statement DOES NOT express your organization's needs or ask for funding. Instead, it identifies the needs/issues/challenges in the community that the grant request would address. In a grant proposal, this is sometimes called an impact statement, community impact, or something similar.

For a non-profit working towards creative solutions for people experiencing homelessness in the Seattle area, this is a sample list of the needs in their community:

- Lack of affordable housing in King County
- Lack of space for affordable housing in King County
- Class segregation in housing
- High rates of homelessness and poverty
- Disconnect/ lack of understanding between the housed and unhoused populations
- Social exclusion of those living unsheltered

### **What to include in a needs statement:**

- Research and statistics about your subject area that describes the scope of the problem and who is impacted
- Anecdotal data from your own organization that shows how your approach is making a difference
- A description of why the problem is important in the larger community context

- Underlying or root causes of the problem you are trying to address (i.e. systemic racism)

#### Sample Needs Statement:

As of 2020, 30% of the population (approximately 22,923 people) is experiencing homelessness in Washington (Seattle Times, 2021). According to July 2020 data from King County, 11,751 of those people were experiencing homelessness in Seattle. There is evidence the total number may now be even higher: a survey completed by Seattle Pacific University and University of Washington found the number of tents on Seattle's sidewalks increased by more than 50% during covid-19 (Seattle Times, 2021).

The crisis of homelessness is exacerbated by the lack of affordable housing in King County. The Area Median Income (AMI) is a figure determined by the U.S Department of Housing and Urban Development (HUD) to help calculate affordability. The AMI is ballooned by high-paying jobs in Seattle's tech sector. In fact, 41% of Seattle's renter households have incomes at or below 50% AMI. Further, only 1/3 to 2/3 of rental units were affordable and available to these households' pre-pandemic (Housing Consortium, 2018). Rental prices rose 22.6 from November 2020 to December 2021 (Cabotaje, 2021), further widening the gap in affordable housing.

Homelessness and lack of affordable housing are related to Seattle's codified history of racial segregation. According to the Seattle Civil Rights & Labor History Project at University of Washington, "White-only clauses and other restrictions (which sometimes excluded Jews as well as people of color) can be found today in property deeds for many neighborhoods" (n.d). After these so-called Racial Restricted Covenants were publicized, House Bill 1335 was passed to enable Eastern Washington University to conduct a survey to locate the remaining racist deed restrictions.

Understanding the racist history of Seattle's housing development can drive novel solutions to repair the harms caused by historic policies such as Racial Restricted Covenants. Taking advantage of Seattle's process for permitting and building Accessory Dwelling Units (ADUs) can provide one solution to re-integrating previously segregated single-family home neighborhoods. According to Seattle building code, an ADU of up to 1,000 sq ft can be constructed on single-family lots of at least 3,200 sq ft. Transforming underutilized yards into permanent housing for those who have been unsheltered can address both the housing crisis and the issue of racial segregation in Seattle's residential neighborhoods.

Finally, backyard ADUs can also help with societal attitudes towards those experiencing homelessness. A 2018 survey published in the Wiley Journal of Community Psychology found that 56.7% of respondents took caution "not to touch a homeless person" (Tsai et al.), indicating the "othering" attitude commonly held by housed members of society. Including previously unhoused residents in traditionally single-family neighborhoods can integrate these populations and has potential to generate greater compassion, empathy, and understanding towards those who remain unhoused.

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### How do the needs and case statements fit together?

While the needs statement may sometimes be required on its own or as part of a grant proposal, the most compelling case statements will also weave in elements from the needs statement. Using statistics from the needs statement to paint a picture of the magnitude of the problem you are working on can help compel potential donors to action.