

# The CASE Statement

## Best Practices Case Study

Saints Peter and Paul School  
West Chester, PA

HEALEY EDUCATION FOUNDATION | Helping Schools Help Themselves

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*“We needed to cast a wide net but also reach people with a message specific to our school – two seemingly conflicting but attainable goals. Our case states that each gift is an investment in an environment that inspires children to be innovative, creative, compassionate, Christ-centered leaders of tomorrow.... The school’s students personify the statement. They demonstrate that what we say is true.”*

– Trish Kyle

Advancement Director  
Saints Peter and Paul School

## Making CONNECTIONS TO MEET ANNUAL FUND GOALS

**PURPOSE:** Saints Peter and Paul School (West Chester, PA) had introduced the concept of an Annual Fund as the mission and branding strategy were rolled out. A case statement would enable the community to explain how fulfilling the school’s needs would benefit students and further the mission.

**APPROACH:** Defined in the months leading up to the first Annual Fund, the case statement reflects the school’s mission, including the academics and nurturing required for students to become compassionate, respectful, knowledgeable, creative, civic-minded leaders of tomorrow. The case sets the tone for all other messaging throughout the Annual Fund cycle.

### IDENTIFYING OPPORTUNITIES

A school 14 years young with its oldest graduates now just in college, Saints Peter and Paul looked well beyond its alumni base and current parents for prospective donors. Parishioners and a nearby over-55 community became highly engaged givers.

### LINKING NEEDS TO DONOR INTERESTS

Parishioners are eager to support a school that strengthens the Catholic faith and spiritual values of students. Many community members respond well to the focus on academics and digital literacy to prepare students for a diverse and changing world.

With targets and messaging identified, the school succeeded with smart tactics:



1. Personalized solicitation, thank you letters, and phone follow-up with messages adapted by constituency.
2. An involved Development Committee that owned the process and led by example.
3. Lead gift events to capture larger gifts from donors at the top of the giving pyramid.
4. A new, convenient online giving option resulting in an immediate uptick in giving.
5. Stories and giving data shared through an annual report conveying the theme *love, serve, celebrate*

## A CASE STATEMENT THAT DELIVERS RESULTS:

- Conveys the mission of the school
- Matches donor interests with school needs (in the form of value, benefits, opportunities, impact and outcomes)
- Answers “why,” not just “what”
- Makes the case in a clear, concise, compelling way
- Touches the heart and opens the mind

## EXPLAIN THE INVESTMENT, ASK DIRECTLY



Saints Peter and Paul School also explains how each contribution helps narrow the gap between tuition and cost per student and expand programs. In its second year, the Annual Fund supported art and foreign language programs, weekly on-site IT support, and building repairs and maintenance that also benefited religious education and youth programs. Each letter asked for a gift in a specific dollar amount. “We stuck to the rule book,” said Trish Kyle, Advancement Director. “Data shows that asking directly works.”

**OUTCOME:** In the first year of the Annual Fund, 189 donors exceeded a \$75,000 goal to contribute \$79,222. The following year’s goal of \$120,000 was also exceeded. A published goal of \$130,000 (with a higher internal “stretch goal”) has been set for year three, with plans to engage more businesses and host lead gift events at the school as well as in private homes. The school also draws upon its case for support in promoting other giving options, such as the Educational Improvement Tax Credit (EITC), annual golf outing, and spring auction.