Guidelines for Writing a Case Statement

When you apply for outside scholarship support through a charitable foundation, scholarship fund, or employer, it is likely you will be asked to write a case statement.

Here at AULA, we know this isn’t something most people do every day, so below you will find some helpful case statement writing tips.

Also, if you are applying to your employer to fund your education, please don't miss the important note at the end of this document.

Getting Started: Understanding the Question and the Audience

Some scholarship applications might ask for a “case statement.” Some may frame it as a series of “application questions,” a “statement of purpose,” or something else that is created expressly for their application.

It is vitally important to read carefully what they’re looking for and to respond to their exact questions. That said, it is probable—though this is not necessarily the case—that the crux of the question will be:

*How will providing you with money for your education help us to advance our agenda or mission?*

Note that this question is just as much about them as it is about you. A frequent mistake occurs when people use their case statement to simply reiterate what is on their resume. While you may have accomplished a lot, the key is to show how your accomplishments, skills, and goals match their organization’s mission or agenda.

Also note that different organizations will have different expectations in terms of your case statement. Your employer is going to be looking for something very different than a nonprofit scholarship organization designed to assist low-income people.

Make sure you have carefully read everything you can about the potential scholarship donor, and if possible, speak to someone at the organization or to someone who has received a scholarship in the past.

It’s also important to remember that the application readers will be going through quite a thick stack of paper. Readers will be looking for case statements that stand out from the rest. Many of the applicants will be well-qualified, but one of the easiest ways to stand out, on top of expertly answering all of their questions, is to be an excellent storyteller. At the end of each step, you’ll see a segment called “Notes on Storytelling”
**Step 1: Paint a precise picture of how well you understand the problem at the core of their agenda, goal or mission.**

- What is the potential scholarship donor’s mission or goal?
- What is the specific problem at the heart of their mission or goal?
- How pervasive is the problem they are trying to resolve?
- What will happen if the problem remains unresolved?

Notes on Storytelling: Most good stories involve overcoming an obstacle. The problem at the heart of their mission or goal is the obstacle that you will be able to help overcome if you are given the resources to do so. If possible, it is best to use a tangible, specific example of how a specific person other than yourself is affected by this obstacle.

**Step 2: Being as specific as possible, illustrate why you are interested in their mission.**

- What is the core ethical or moral principle at the heart of their mission?
- Why are you passionate about that principle?
- What in your specific background makes you passionate about that principle?

Notes on Storytelling: This is the heart of the argument, where you get to show how you share a passion for their mission just as they do. This is where you demonstrate why you, in terms of personality and aspirations, are the person best suited for their scholarship.

**Step 3: Highlight your unique qualifications for furthering their mission and resolving the problems they care about.**

- Without simply restating what is on your resume or C.V., show how your experience and background line up with their organization’s mission and goals.
- What have you already done to show that you are already working to solve the problem(s) the organization cares about?
- What has been the impact of the work you have already done?
- What makes you unique?

NOTE: If you feel you don’t have relevant experience, be sure not to short-change yourself. Experience in fields outside of the one they specialize in could be the thing that makes you stand out from other applicants, as long as you frame it as a strength rather than a weakness.
Notes on Storytelling: This is where you get to tell your backstory, showing how you have the experience to overcome the obstacles at the heart of their mission.

**Step 4: Express how your long-term plans align with their mission.**

- What is your long-term strategy for accomplishing your goals?
- Where do you see yourself immediately after graduating? Several years after graduating?
- How will the education you receive allow you to achieve these long-term goals?
- How do these goals fit the scholarship donor’s mission?

Notes on Storytelling: This is where you paint the picture of the future, showing the ideal situation where you are helping achieve the goals they care about well in the years to come.

**Step 5: The tangible benefits**

- How will their monetary assistance help you in your specific situation?
- What benefits, if any, will they receive financially in the long term?
- How exactly, being as specific as possible, will you help them accomplish their mission both during your schooling and after graduation?
- Who specifically will benefit from the work you do as a result of your education?

Notes on Storytelling: This is an extremely important part of telling the story, where you show them how exactly they will benefit by choosing you as a scholarship recipient. If possible, it is best to use an example of how a specific person—possibly the person mentioned in Step 1—will be able to overcome the obstacle at the heart of the scholarship donor’s agenda as a result of your efforts.

**Special Note on Applying to an Employer**

Though almost all of the advice above still applies, applying for funding for your education from an employer presents some unique opportunities and challenges.

- First, as an internal applicant with knowledge of the organization, you are in a unique position to know the decision makers’ personalities, concerns, and needs. Likely, your request will go through a supervisor and then on to the leadership of the organization. If possible, it will be important to tailor your statements to these individuals’ specific concerns.
- Second, because you will be applying internally instead of externally, it may be, depending on the exact circumstance, appropriate to be slightly less
formal in the tone of the application to acknowledge your already existing relationships.

- You may also be in a position to speak to the decision-makers in person, if they are willing to do so, and you may be able to use that to your advantage.
- Depending on the exact nature of the opportunity, it may also be advisable to use more inclusive language — “we” and “our,” for example — to show that you see yourself as a long-term member of their team.
- Finally, employers may fear that you will use your degree to move on to another position at another organization. To assuage these concerns, lay out the specific additional tasks your education will allow you to perform for them.
- Despite these differences, the key question remains very similar: *How will providing support for your education help your employer to advance their agenda or mission?*