

Case “Prep” Checklist Resource

In preparing material for your case statement, here are some detailed questions to ask, examine - and then answer. Check off each question as you complete the material.

Use this great resource as a guide to getting ready for writing a case statement. You don't necessarily have to *include* all of this information, nor should it necessarily be presented in this order; but responding to all, or most, of these questions will definitely provide all the background you need for writing the case.

√	Why does your organization exist– its mission, vision and values.
	What issue was your organization created to address?
	Do you have a mission statement that speaks to the issue?
	Is your mission statement succinct, moving and memorable?
	Do you have an inspiring vision statement?
	Is there a written statement of the values your organization lives by?

√	How is your organization positioned in the community and what is its history and heritage?
	When was your organization founded?
	What were the circumstances surrounding the beginnings?
	What are some of the highlights or special accomplishments of your organization over the years?
	What geographical area does it serve?
	Industrial and business concentration?
	What distinguishes the area from the rest of the country or region — a capital, a distribution center, a rural area?
	Describe the population of your service area.
	Population trends. Increasing or decreasing? Aging?
	Level of affluence and occupational types.
	Educational level and cultural types.
	Ethnic origins.

√	How does your organization benefit the community— how and who does it serve?
	What are the services offered by your organization?
	How many people use these services? Have they increased or decreased? Why?
	How much do each of these services cost? Are they furnished free or subsidized?
	What are the services offered by other organizations in your service area?
	Is there any duplication of services or is the organization's niche unique?
	Does your organization cooperate with others in sharing programs or use of facilities?
	In the community, is there a need for services not currently being met that your organization could fill if it had increased funds?
	If your programs were increased, how many potential new users of the organization could you expect to attract?

√	Why is a fundraising program necessary?
	Why does your organization need funds?
	Are you fundraising for capital or endowment funds, annual giving or a combination?
	What are the specific components of the campaign and project?
	How will the project or program and thus, the campaign, improve your organization's ability to fulfill its mission?
	How much money does your organization need?
	How will the money be raised?
	Have alternative sources of funding been investigated? (government grants, loans etc.)

√	Does your organization have strong leadership?
	Who is on your Board of Directors (or Trustees)?
	What community constituencies do board members represent? Are there different ages and both sexes represented? Major business and commercial interests?
	How many staff do you have?
	Is the staff well-qualified?
	What are the major strengths and accomplishments of your CEO/Executive Director and other key staff?
	Does your organization use volunteers and are they effective?

√	Is your organization fiscally sound?
	What is the current operating budget?
	Does the organization 'break even' financially or operate with a small surplus?
	Who makes the major contribution(s) to the present operating budget?
	How much of your operating budget comes from donations? What specific fundraising programs do you operate?
	Does your organization have a membership drive, admission fees, or government funding?
	Does it have an endowment?
	What are the financial assets and liabilities of your organization?
	Does your organization have a Planned Giving program?

Fundraising for a Specific Project or Program

When fundraising for a specific project or program, you need more detail about these elements of your case. You will also need to answer the following questions:

√	What is your detailed plan for the new project or program for which you are now seeking funds?
	Purpose/goals of the project including the specific problem it is designed to address.
	Which group(s) will it help?
	What are the specific objectives of the project and program and what actual activities will you undertake?
	What people and other resources will be needed to implement the project or program? How long will it take?
	How much will all this cost and where will the funds come from?
	How will you know if your plans are successful? – The evaluation plan.

√	How will donors benefit from supporting the organization?
	Have you actually asked for a gift?
	How can a donor make a contribution? Are there different ways of giving? Will pledging be part of this campaign? Will you accept planned gifts and how will you count them?
	Beyond satisfaction, what specific benefits and recognition will the donor receive for their giving?
	Are there special designation or naming opportunities associated with various levels of giving?