

Case for Support Checklist



The case for support or fundraising prospectus is the foundation of good fundraising. No one should ask another for money without being able to answer the question, “Why should I give to this organization?” The case essentially answers that question, by outlining what the organization is, what it does, its impact in the world or community, the past and present leaders, financial and other assets, governance, and how future gifts will be put to use.

Developing the case is an excellent opportunity to involve leadership, staff, volunteers, donors and prospects in an activity that will excite passions and educate constituents. It should lead all involved into a closer relationship with the organization that will result in increasing involvement. Through a carefully guided process, the organization should invite the participation of key stakeholders and cultivate their engagement in and commitment to your organization. This type of involvement will most likely result in financial support and/or volunteer advocacy.

The following checklist may be used to guide a discussion of and track progress towards the completion of an organizational case for support.

Activity	Person Responsible	Due Date	In Process (Date)	Needs Revision (Date)	Complete (Date)
Mission Statement					
Vision Statement					
Statements of Values					
Goals and Objectives					
Program and Service Descriptions					
Accomplishments and Awards					
Facilities Description (if applicable)					

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Stories of Impact					
Statistics of Impact					
Description of Governance					
Financial Information					
Organization History, Folklore, Heroes and Founders					
Funding Goals and Priorities					
What the Priorities Will Accomplish					
A Gift Table or Pyramid					
Ways to Give					
Naming Opportunities (if applicable)					