

## CASE FOR SUPPORT CHECKLIST

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By Anita Nowery Durel, CFRE

This checklist is designed to help those assigned to the task of drafting a Case for Support. It covers the essential elements of the Case and highlights questions that will help uncover the passion behind the Mission.

### MISSION VISION VALUES – *Establishing the Vital Nature of the Work*

#### MISSION

1. What void or issues was your organization created to address? Basically, why does your organization exist? What is the Mission? Is it adequate/up-to-date?
2. Is the statement compelling and memorable?

#### VISION

1. What's next? Where are you headed? Why should your organization continue to Exist?
2. Goals, strategies, and priorities.
3. How is your work relevant in today's world? What has changed?
4. What are you planning to do that warrants continued public support of your work?
5. With additional funding/staff/resources what services could be expanded/enhanced?
6. Are there additional needs that are not being met? How will you address these?
7. Is your Vision inspirational? Is the message compelling?

#### VALUES

1. Is there a written statement that outlines agreed upon values?
2. Does the organization actually live by these values? How?
3. Are the values reflected in the work of the employees and the board?
4. How will these values affect the Mission and Vision as you move forward?

#### I. WHAT YOU DO – *Recognition of Value to the Community*

1. What programs/services do you provide?
2. Who do you serve? Audiences? Outreach? Demonstrate impact with stories.
3. How many people do you serve? Has this increased/decrease? Why?
4. How will current trends/changes influence your work and vision?
5. Are there similar organizations in your area?

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6. What differentiates your organization locally, regionally, nationally?
7. Do you have partners or cooperative programs with other institutions?

**II. BACKGROUND, ACCOMPLISHMENTS – *Building Credibility and Confidence***

1. When was the organization founded and what circumstances surrounded the founding? Brief history.
2. What geographic area do you serve? Describe influences and demographics that are important to understanding your story and relevance such as economic influences, educational levels, prevalent industry/business, growing trends, and representative ethnic and minority groups. What kind of place is this? Why does your work matter here?
3. Describe past accomplishments, accolades, and awards, recognition, for the institution or specific staff members if appropriate. Have you made strides in publication, scholarship, accreditations?

**III. NEEDS/OPPORTUNITIES – FUNDRAISING – *Public Participation in Valued Work***

1. What are you raising money for? Specific needs and opportunities?
2. Why does your organization need to raise money?
3. Why are these needs important? Why do you need this now?
4. Are there real cost that are unknown to the public? Misperceptions to address?
5. What are all the components and phases of this fundraising effort?
6. How will requested funds improve your ability to achieve your Mission?
7. How much is needed and how will it be raised?
8. Who will raise the money and who will provide support and other financing?

**IV. SUMMARY – *Strategic, Compelling, Vital, and Visionary Statements***

1. How do all the components addressed above fit into your strategic plan?
2. Why are you the best to deliver on this topic/issue?
3. What's at stake if you don't accomplish your goals?
4. Why should you continue to exist?