CASE STATEMENT PREPARATION CHECKLIST
(Everything You Wanted To Know About Getting Ready For Our Writer!)

Soon, our writer will be with you. In order to prepare for the visit and develop the assignment most effectively: i) be prepared to discuss or ii) have on hand the items listed below. If you have any questions, or if anything requires clarification, please be quick to call us.

Immediately following the data gathering, our writer will begin the development of the concept and theme for your Case Statement.

The first draft will come to the appropriate partner for preliminary editing, and then to you for approval. The First Draft should not take longer than two weeks following the visit. Some statements take longer than others, but two weeks should do it.

Have one or two of your key leaders review the draft with you— and return your edited, approved copy to the writer as promptly as possible. Our experience is that the more people who review it, the more difficult it is to get consensus . . . and worse— the lower the likelihood of achieving a really effective and exciting Case Statement.

The Partners

√ **Please check when completed**

- ☐ A brief history of your organization.
- ☐ The Mission Statement of your organization.
- ☐ Your organization's short- and long-range objectives and goals.
- ☐ Marketing or program plans developed to reach objectives and goals.
- ☐ The results of any recent market research study.
- ☐ The annual budget of your organization including a breakdown of sources of support: i.e., corporate contributions, individual contributions, foundation grants, United Way revenue (if you are a member agency), fees, etc.
- ☐ A description of your major programs and a rationale of how these meet specific client needs.
- ☐ Membership or client information including statistics for individual program participation and the total number served. Information on membership or client demographics— age, race, and income will be helpful.

- ☐ Information on the funding sources within the community: those who have given in the past and those you will target for the campaign. Any relevant research is particularly helpful here.

- ☐ Information on growing constituency or community needs—those the organization will address within the next few years. Statistics to support these claims help define these areas of need.

- ☐ Within the context of the organization's mission, how will the organization strive to meet these emerging needs? Citing specific programs or initiatives and specific participation goals will be most effective.

- ☐ Specifics on the campaign— including the total goal and the cost of any individual projects.

- ☐ Information on the role of the campaign and how the funds will translate into the people served, and lives changed and saved.

- ☐ Endorsements from recognized community leaders and appropriate government officials help build a persuasive case.

- ☐ Any characteristic of your programming, history, or individual relationships that the organization holds in esteem will elevate the campaign's importance.

- ☐ Your biography and those of the founders, the CEO, and your leaders who are key to the organization's vitality and success provide another human element.

- ☐ Schedule several interviews, about thirty to forty-five minutes each. This should include you, Chair of the Board, one or two board members, any other appropriate staff, and one to three interviews with clients participating in programs you have identified as key to the campaign. Interviews that illustrate how a client's life has been enhanced or changed through your programs are particularly effective. This is also true for any interview demonstrating a special relationship between a supporter and staff member or volunteer.

- ☐ Photographs of the facility, staff and clients working together, clients being served, and shots of those individuals to be interviewed. These help generate empathy for your cause. Please be certain to have available for the writer to review a number of photographs to use for the printed document available.