

# CDS CASE STATEMENT CHECKLIST



## BACKGROUND INFORMATION

- History of the institution
- Reason for its founding
- Organizational mission
- Noteworthy accomplishments

## THE SITUATION TODAY

- Role of the institution in the community
- Specialized programs and/or services
- Facts and figures regarding its operation

## THE NEED

- Challenges confronting the institution
- Opportunities for better service
- Demands on the institution requiring a response

## THE RESPONSE

- The institution's proposed plans
- Description of construction, renovations, etc.
- Intended results of the plans

## PROGRAM FINANCING

- Current sources of funding available
- How the difference could be financed
- Proposed fundraising campaign

## FUNDRAISING CAMPAIGN

- Careful planning which led to the study (the process of due diligence)
- Proposed campaign financial goal and breakdown budget segments
- Named giving opportunities and forms of giving and donor recognition
- Total need, if different from goal
- Tax-deductibility of gifts
- Timing of campaign
- Benefits of a successful campaign to the community

## OTHER SUPPORTING DOCUMENTS

- One-page slip sheets with quick question/answers
- Financial information (990 Form) and audited financial statements, annual report where appropriate
- List of Board members and key professional staff
- Testimonials supporting the organization's mission, services and plans for growth
- Key demographics of population served