



Key Document Case Statement

The case statement is the single most important document with which the planning group will work in preparing for Giving in Grace. A full and thorough draft of the case statement is essential to the consultation process with the leadership of the church to finalise the Giving in Grace programme and to ensure that the leadership gives a strong, positive and committed commendation of Giving in grace to the wider church.

The case statement is a working document designed to:

- analyse the financial issues facing the church
- examine the giving patterns
- summarise the parish plan and budget for the following year
- agree the issues the Giving in Grace programme needs to address and sketch out the initial proposals for the Giving in Grace programme in the local church.

The case statement is in six basic parts

1. The church today - strengths weaknesses and plans
2. The financial situation: giving patterns, parish reserves and the parish plan (or budget)
3. The conclusions to be drawn from an examination of the financial facts.
4. Produce a Gift Array - a proposed scale of giving to meet the need
5. A provisional draft programme design to address the salient issues
6. Questions for a consultation process

The case statement should be read and prepared alongside the discussion papers on [theology](#), [leadership](#) and [differentiation](#) in order to think about the programme's aim to develop the connection between faith and money for the whole church membership. Giving in Grace is not a fundraising programme. The case statement is a theological document as well as a practical tool. It will help church leaders to understand better what the financial issues are in the church and what strategies might be appropriate to address them - both for the financial health of the church and the spiritual health of the members! The case statement draws together existing plans and highlights strengths and weaknesses.

Giving in Grace as a stewardship initiative focuses on the financial resources for ministry but it is not an isolated initiative. It begins by discussing financial needs in the light of reflection on the current strengths and weaknesses of the church and making provisional plans for action. In this way the case statement contributes to the development of vision and ministry in the church over the next two or three years.

When completing the case statement comprehensive guidance can be found on the Giving in Grace web site. In particular the web page [Preparing the Parish Case Statement](#) and the links from that page should be carefully consulted.



Case Statement

Section 1: Strengths, weaknesses and plans

The 3 main strengths in our church	<ol style="list-style-type: none">1.2.3.
The 3 main weaknesses in our church	<ol style="list-style-type: none">1.2.3
Our agreed or provisional plans for ministry and mission over the next 2-3 years	<ol style="list-style-type: none">a.b.c.d.





Section 2a: Giving patterns and reserves

This page of the case statement consists of three charts:

- Weekly giving patterns of tax efficient givers
- Weekly giving patterns of other planned givers
- The current level of parish reserves.

These charts are produced from data held by the parish and must be entered into an Excel file called *Weekly Giving and Reserves Analysis*. Access to this file is from the web page [Drafting the Case Statement: Weekly Giving Analysis](#) and the Excel file icon can be found on this page. This page provides detailed guidance on how to enter the data and complete the Excel file.

*When the Excel file is completed the worksheet **Tables and Charts** should be printed off and inserted at this point in the Case Statement. It is paginated as Page 2 and should replace this page of the Case Statement.*

Analysis of the weekly giving patterns of the church gives the most detailed and illuminating insight possible into the patterns of church giving. The analysis provides essential information for the planning group in helping to identify areas that need attention and to shape the Giving in Grace programme in the church.





Section 2b: the parish plan

This section requires the completion of a simple financial plan which anticipates expenditure and income for the coming financial year. To complete the parish plan guidance is available on the website at [Drafting the Case Statement: the parish plan](#). From this page you will be able to download the Excel file *Parish Plan*. The worksheet you need in the Excel file is unimaginatively entitled **Parish Plan** and it should be the sheet you get when you open the file. If not, look at the bottom of the screen where you will see the three worksheet tabs. Click on the one called **Plan**.

The web page contains guidance on completing the Parish Plan which can also be found on the first worksheet in the Excel file entitled **Notes**. The spreadsheet also has a worksheet entitled Variance Report which can be used by the treasurer to monitor the progress of the Plan. However, this is an entirely separate task and can be ignored for the purposes of completing the case statement.

Once completed the worksheet Parish Plan should be formatted to suit and then printed off and inserted at this point in the Case Statement. It is paginated as Page 3 and should replace this page of the Case Statement.

This plan sets a financial baseline which will allow the church to set a financial target for a required increase in giving. This target will be reflected in the presentation of the Gift Array (see below) which will set out a range of financial responses from which the congregation can choose what is most appropriate for them.





Section 3: Financial conclusions

In 200? the cost to fund the ministry of this church, including our planned developments is:	£	each week
Currently our total income runs at:	£	per week
Do we need to increase giving? Yes or No	What for?	
If so by how much per week	£	
Our pattern of weekly giving shows		
Our use of reserves shows		
Our planned giving shows		
Our open plate giving shows		
Our accounts show our mission giving as	%	of our direct giving income

The principle financial issues to be addressed are:	Yes or No	Comments
Levels of giving		
Proportionate giving		
Maximising gift aid		
Increasing numbers of planned givers		
Increasing numbers giving by standing orders		
Mission giving		





Section 4: The Gift Array

The Gift Array puts the principle of differentiation into practice by providing a range of possible financial responses for members of the church to choose what is most appropriate for them. The minimum target figure for the Gift Array is of course the shortfall identified on the parish Plan. However, churches may decide from the analysis of income patterns and their knowledge of the local situation that a more ambitious figure is realistic. Guidance for building the Gift Array can be found at [Drafting the Case statement: the Gift Array](#) which has an example of a completed Gift Array by way of illustration.

Please delete these notes in italics before printing a draft of the Case Statement.

Meeting the challenge - Gift Array			
This many people	Giving this amount <u>extra</u> each week	Totals	Would help us to:
	£	£	Balance our books Help serve our community Worship and grow in faith Honour God Extend our mission Increase our mission giving
	£	£	
	£	£	
	£	£	
	£	£	
	£	£	
	£	£	
	£	£	
	Total	£	





Section 5: The Giving in Grace Programme design

Use this table to draft the simple outline of a provisional programme. Some key issues are suggested but there are many others that the planning group will consider. The Giving in Grace web page [Case Statement: Programme Design](#) has some additional questions which will also be useful. The website contains a great deal of material and a broad overview of the options and some familiarity with the content will be needed in order to draft a provisional programme.

To make this possible each planning group member should take responsibility for one aspect of the Giving in Grace programme – perhaps Communication or Interaction – and explore the resources in that section of the website. Members can then give an overview to the planning group and make some suggestions.

Again please delete these notes in italics before printing a draft of the Case Statement.

Teaching and preaching	Preaching track: Dates of programme Children and teens Date for the Thanksgiving Sunday Who will be the preaching co-ordinator for the programme?
Communication	Brochure Targeted letters Response forms Appoint an administrator for follow up of responses Who will be the communication co-ordinator for the programme?
Leadership from the PCC/ DCC	Will the PCC declare their corporate response early? Will personal consultation with the PCC be part of the planning process? Who will be the leadership co-ordinator for the programme?
Involvement and interaction	Is some form of visiting to be an element in the programme? Who might be an administrator of a visiting programme? Will small groups be a feature of the programme? Which small group resources might be used? Who will be the Interaction co-ordinator for the programme?
Prayer	How will individuals be encouraged to pray? How will the PCC be encouraged to pray? Are prayer groups and/or prayer triplets an option? Who will be the prayer co-ordinator for the programme?





Section 6: Questions for consultation

<p>Do you agree with the facts and analysis?</p>	
<p>How do you feel about the Giving in Grace proposals?</p>	
<p>What do you think the church should be doing?</p>	
<p>What are the real issues?</p>	
<p>Are the financial targets proposed achievable?</p>	
<p>Are you willing to give more on the Gift Array?</p>	

