Case Statement

Discussion Paper

Introduction

The case statement is the foundational document within Giving in Grace. In the early stages of preparing for Giving in Grace it provides a focal point for the energy and activity of the planning group and summarises the key information that will underlie the whole of the programme. More than that, the case statement is a vehicle for obtaining consensus, generating ownership and inviting a committed response from the leadership of the church.

Working up a case statement is a very useful discipline for the planning group as it begins its task and works together. By establishing a financial baseline, identifying priorities to address and summarising current or planned ministry initiatives, the case statement offers a clear and succinct summary as to why people in the pews should reflect upon and renew their giving to the church.

Why a case statement?

The case statement model is an adaptation of a tried and tested method used by fund raising professionals. Harold Seymour, the father of modern fundraising, defines the case statement as *"the one definitive piece of the whole campaign. It tells all that needs to be told, answers all the important questions, reviews the arguments for support, explains the proposed plan for raising money and shows how gifts may be made, and who the people are who vouch for the project, and who will give it leadership and direction".*

The case statement is not a detailed business plan but an inspirational working document that crystallises the purpose of the capital project and establishes the overall costs. Harold Seymour again, *"The case is an expression of the cause or a clear, compelling statement of all of the reasons why anyone should consider making a contribution in support of or to advance the cause".*

Drawing up the case

The planning group is responsible for making a first draft of the case statement. Preparation should not be rushed and time invested in discussion and consultation amongst the planning group and with the PCC will be richly rewarded. The bullet points below summarise the main steps to be taken in developing a case statement. Guidance for action at each step in the development of the case statement is in the Case Statement page found in the leadership section of the Giving in Grace website. The Timetable section also sets out a series of agendas which if followed carefully will structure the completion of the case statement.

- The raw data required for the Parish Case Statement is gathered and discussed by the planning group in both its first and second meeting in the timetable of agendas.
- A member of the planning group, perhaps the chair or the clergy, prepares an initial draft. One to one discussion with planning group members in addition to the meetings will enhance ownership of this initial draft.
- The parish case statement is then tabled for discussion at a dedicated PCC or leadership meeting. This is the first element of the consultation process.
- After the leadership meeting the initial draft of the case is revised to reflect the outcome of those discussions.
- Ideally, one to one consultations are then held with PCC members by members of the planning group. This second part of the consultation process is a key part of engaging the leadership of the church with Giving in Grace.
- Following the PCC consultations it may be necessary to make some minor revisions to the Parish Case Statement.

The structure of the case statement

The case statement is broken down into six sections:

- Reflection on the current strengths and weaknesses of the church's ministry.
- An overview of the financial position of the church: the financial baseline.
- The conclusions and actions arising from consideration of the financial position.
- A realistic 'gift array' to meet financial targets to resource ministry.
- A draft and provisional outline of a Giving in Grace programme that will present a biblically based challenge to the church to resource its ministry and mission.
- Questions for consultation with the leadership.

As the structure indicates establishing mission and ministry priorities is the key driver in the case, complemented by a robust understanding of the present financial situation of the church. Planning groups need to reflect carefully on the raw financial data. The goal is to identify the primary issues that need to be addressed and strategies for addressing them. For example, persistent dependence upon historic reserves to subsidise weekly costs may be traced to low levels of giving amongst tax efficient givers. In addition few members may have been recruited to the planned giving scheme and no one gives by standing order.

Alongside understanding the present will be a vision for the future: some key areas of ministry and mission that will be addressed and which the requested increase in giving will resource. The case statement crystallises both present financial reality and future plans and outlines the programme that will address these issues.

Engaging the leadership

The beginning of the preaching series marks the launch of Giving in Grace in the local church. However, before this happens there is a vital step to be taken. Sometimes giving initiatives fail to make a significant impact upon a church and in many cases, perhaps most, the cause is clear. There has been a failure on the part of the leadership of the church to adequately support and advocate the programme in the congregation. Experience suggests that it is entirely possible for PCC members to voice and then vote their support for a financial initiative but fail to make any personal response themselves.

To secure consensus and ensure that all leaders are involved in the planning process the draft case statement prepared by the planning group is reviewed at a specially convened PCC or leadership meeting. This consultation meeting should be planned in advance to take place (usually) after the third meeting of the planning group. Consulting with the church leadership around the initial draft of the case statement builds consensus and engagement. This consultation around the draft case is not about finding the lowest common denominator but building real agreement on the direction of the church, the financial needs identified and the thrust of Giving in Grace.

One to one consultations

In many churches a single leadership meeting to review the case statement is all that can be managed. However, if at all possible the planning group should also plan to have subsequent one to one conversations with members of the leadership team.

The comments and criticisms made by the leadership of the initial draft of the case statement are included in a second, revised draft. This second draft then forms the basis of planned one to one conversations between planning group members and members of the leadership team. The revised copy of the case statement should be sent in advance to the recipient and a meeting arranged with sufficient time to allow for a full discussion of the issues raised.

The case statement offers a framework for personal conversation which is the most effective way of promoting interest, involvement and investment in Giving in Grace. Such one to one consultation reaps rich rewards. On the one hand the interest and involvement of PCC members in the consultation will issue in far greater investment – personally and financially – in Giving in Grace than a request to be passive givers to a financial need. On the other hand the leadership of the church will be far more aware of the concerns and priorities of core members for the current direction and future plans of the ministry of the church. Those consulted should know and feel that they are making a positive contribution to both understanding and planning. They are not presented with a *fait accompli* but with a work in progress, and their positive input is both invited and welcomed.

In the light of those conversations the case statement is revised again so that its final form reflects the concerns and aspirations of the church leadership.

Personal response

It is vital that the element of personal response is not omitted. As leaders the PCC do not just agree a form of words but also make a personal commitment to the challenge of Giving in Grace for themselves. Planning group members who visit the PCC or church leadership team should have already decided or actually made their own personal commitment to review their giving as a response to Giving in Grace. Indeed it is helpful for the *corporate* total from the planning group to be declared as part of the consultation process amongst the PCC. For example, towards a £260 per week shortfall the planning group have committed a total £57 increase.

In the same way PCC members should also take seriously a challenge to make their own formal response *prior to the launch of Giving in Grace in the church*. This allows the corporate response of the leadership to be declared in the clergy ask letter that will be sent to the congregation requesting a response. For more on declaring the leadership commitment in advance see the Discussion Paper on Leadership. For more on the letters sent to the congregation see Writing the Clergy Ask Letter

Conclusion

The case statement is a key document in gathering baseline data and presenting a ministry plan. Its lasting value lies in the quality and the courtesy of the discussions around it and the consensus for action that it builds.