



# The case statement

## Building the database

### Introduction

Much stewardship communication is 'spray and pray': we spray out as many letters as we can and pray that someone will respond. The assumption is that more letters means more response but this is simply not true. For example, a well attended church with a large fringe and successful uniformed and other organisations sent out a single mailing to all those on the electoral roll. The financial response was very encouraging but closer reflection indicated a response rate of less than 25%. Three quarters of those asked saw no reason to reply to the request.

We do need a comprehensive database for written communications so that the Gospel challenge is presented to all and that no one is excluded with potential hurt. But we also need a database that is differentiated, that recognises that the people in our churches are at different stages of their spiritual journey, understanding of church life and finances and their economic situation.

Before beginning to construct a differentiated database the planning group should take time to discuss the principle of differentiation. A [web page](#) has a brief introduction and there is a longer [background paper on differentiation](#).

### Step 1: who is in our Core grouping?

The core is broadly defined as those who are or have been in leadership positions within the church. The core is essential to the success of Giving in Grace within the local church. Their support, personal commitment, involvement and example will provide both the energy for the programme and the lead gifts (sometimes called 'the challenge gifts') that inspire others to believe that the financial challenge

can and will be met. For more information see [Writing to the Core](#) in the Communication section of the website.

The Core can be a mixture of formal and informal leadership in the church. It must be broad enough to embrace those who in practice are leaders within the church but it should be small enough to be meaningful. The definition must be decided in the local situation but consider the following:

- **The PCC or DCC:** At a minimum these folk are the core grouping of the church. They are in positions of leadership and have a representative function and bear a legal (in the case of Trustees, including PCC members) and moral responsibility for effective leadership within the church.
- **Other formal leadership roles:** The core in your church might also include Lay Readers and Shared Ministry Team members who do not serve on the PCC. This may embrace also honorary curates and retired clergy linked to parishes.
- **Retired PCC members:** Some churches might include those who have served on the PCC in the last two or more years. It is often the case that significant local leaders take a short sabbatical from formal leadership roles but nevertheless are still of immense value to the leadership of the church in an informal capacity.
- **Informal leadership roles:** This might include house or cell group leaders, pastoral care visitors or 'heads of departments' such as children's ministry leaders. When the leadership is extended beyond any formal definition of leadership you must be sure that the definition can be justified as coherent and meaningful.

When you have agreed the definition of the core grouping compile a list of all church members who fall into it - then check it against the Electoral Roll or membership list to ensure none have been inadvertently omitted. This is the Core element of your database

## Step 2: Looking at the planned giving scheme

The next step is to look carefully at the planned giving scheme in the church to define the congregational grouping. For more about the congregational grouping see [Writing to the Congregation](#).

- Firstly make sure that you are dealing with an accurate and up to date copy of the planned giving scheme. The Gift Aid secretary will be able to help if there are problems and there may also be a planned giving scheme officer who handles the weekly envelopes. Make sure that you are including in this planned giving scheme anyone who gives by Standing Order or via a charitable giving account.
- The next task is to remove from the planned giving list (for Giving in Grace communication purposes only!) all those who take envelopes (or have Standing Orders) but never attend worship. In some churches people in the community will take envelopes to support the church whilst not attending worship. These are our *associational* members. We value them and their support and we would not hesitate to ask them to help us with the building or a special appeal because we know they care. But Giving in Grace is about ongoing discipleship not one off fundraising. It may be appropriate to include the associational members especially in rural communities but they must be included as associational members, not as members of the congregation. If you include associational members in a Giving in Grace

initiative be sure to draft a new and different letter reflecting the concerns of associational members. Base this new association letter on an edited version of the Fringe letter (see below) and edit carefully.

- Thirdly simply (but carefully) remove from this planned giving list all those you have already defined as core members. You may notice as you do this that some PCC and other core members are not in fact on the planned giving scheme. It is unacceptable that this should be so but it is not unknown. People in positions of leadership and responsibility should be treated as core members regardless of whether they are on the planned giving scheme.

The list you are left with is the congregational grouping in the database

## Step 3: who is our fringe?

The final step is to compile a list of our fringe members. This is the step that requires the most pastoral sensitivity. To understand more about the Fringe grouping within the church see [Writing to the Fringe](#) in the Communication section of the website.

- Begin with the electoral roll (ER) or general membership list. It is the obvious place to start but remember that most parishes will have names on the ER who never attend worship or do so only very, very occasionally. These are more of our associational members. As before exclude them from the fringe list and add them to the associational list if so desired.
- Then from the remaining list one by one extract all the names of those who are in worship with some degree of regularity - monthly, even bi monthly is fine so long as they would see themselves as attending church members.
- Next consult with the clergy about their pastoral lists. There will often be many regular worshippers who



are not on the ER. Many of these people will be on a variety of pastoral lists held by the clergy and sometimes others in the church. Always distinguish between 'regular' and 'contact' lists. A regular list for example might be members of house or cell groups, a regular visiting list, a welcome list or a list of servers. But some names on pastoral lists are in the nature of contacts rather than regular worshippers and we do not want to send inappropriate, unsolicited letters.

- Care should be taken with lists of new members of the church. Their first contact with or communication from the church should not be a request for increased giving. It goes without saying that sensitivity is crucial and consultation with the clergy (where possible) should be at a premium to avoid mistakes. As a rule of thumb do not write to new church members who have not been personally visited in their homes in the previous three months. There should be unaddressed copies of the literature available in church should new members ask for one.
- Finally consider whether there are other lists in the church. This is not scratching for customers! It is simply ensuring an accurate and up to date database. The aim is not to send as many letters to as many people as possible. Instead we are making sure that all those who attend worship on a more or less regular and meaningful basis and would want to be identified with the church (for example families who come to parade services) are included in the database.

This list comprises the fringe list within the church database. Put the three lists together for a database that is comprehensive and differentiated and will allow you to write sensitively to the different groupings with the church. Just remember to update it once the initial work has begun!

### Update the database

An accurate and up to date database in April may not be either by September or October when a Giving in Grace programme might be running and the letters are being sent out. Make sure that someone has the responsibility of updating the database.

- people who have asked for envelopes since the database was compiled and are now in the congregation grouping.
- people who have left the church or are now deceased. Be pastorally sensitive.
- be especially sensitive to new members of the church since the database was compiled. For some it will be too early to receive a letter about giving.

Ongoing liaison with clergy, planned giving officers or Gift Aid officers will be important to keep the list updated. It should be carefully reviewed again prior to sending out the written communications during the Giving in Grace Programme.

### A few churches please note...

In a small number of churches planned giving (by envelope or standing order) is routinely restricted to tax efficient giving while non tax payers give by placing their gifts on the open plate. In these circumstances it would be a mistake to define congregational givers as only those on the planned giving scheme. It would exclude regular and committed members simply because they do not pay tax. A more careful and more subjective construction of the congregational grouping will be needed depending on the local situation. We would strongly recommend that planned giving is not restricted only to tax efficient givers. A planned giving scheme has value in and of itself as a sign of commitment and acceptance of financial responsibility

