The case statement is foundational: a single document that captures key information. It structures the early planning, shapes the local programme, generates ownership and invites a committed response from the leadership of the church. This paper outlines the importance and the content of the case statement.

When Nehemiah returns to Jerusalem to rebuild the both the walls and the vision of God’s people, he first takes a tour of the walls to see the problem and then addresses the leaders of the people: ‘You see the trouble we are in: Jerusalem lies in ruins, and its gates have been burned with fire. Come, let us rebuild the wall of Jerusalem, and we will no longer be in disgrace.’ I also told them about the gracious hand of my God on me and what the king had said to me. They replied, ‘Let us start rebuilding.’ So they began this good work” (Nehemiah 2:17-18).

Nehemiah does three things. First, he tells it as it is. The people have to face the reality of broken walls without pretence, without blaming someone else. Second, and crucially, Nehemiah tells them about ‘the gracious hand of God’ upon him. He comes to Jerusalem with a vision for the future, a purpose, a plan – and with resources from the King. Third, he shares his vision with the leaders of the people and their response is to act.

The case statement is a vehicle for doing all three of these things. It crystallises present reality, sets out both a plan for ministry in the next year or two and a financial target for the necessary resources, and is shared with the leadership of the church with the expectation of agreement and action.

So what is a case statement?
With large capital projects, churches kind of know that they need to make a case and ask for money. But with day-to-day costs there is a tendency to assume that, if people know the need, they will respond generously. Or we talk about budget lines and not the ministry and the changed lives that our giving makes possible.

The case statement does what it says on the tin: it makes the case for giving generously. The basic idea will be familiar to those who have run a capital funding campaign. A capital case sets out clearly the need (disaffected young people), the solution (a youth worker) and the cost (£50,000 per year). 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 in Giving in Grace starts with a vision for local ministry goals, identifies the cost and sets a financial target and a range of gifts to meet that target. It is a working document that captures the key data and purpose of the programme. It is not a business plan. It is not a congregational document as such, although the ministry goals and the financial challenge will be presented in the letters and brochure sent...
The structure of the case statement
The case statement is in seven sections:
1. Reflection on the current strengths and weaknesses of the church’s ministry and identification of specific ministry plans
2. Stewardship reflections: our historic and current practice of stewardship
3. Financial analysis: income and expenditure, giving, reserves and the ‘ministry funding plan’
4. The financial conclusions and actions arising from consideration of the financial position
5. A simple budget to identify total income and expenditure and any shortfall in income
6. A realistic ‘gift array’ – a range of gifts that will meet any shortfall required to release ministry
7. Consultation questions to hone the case with the leadership and to litmus-test leadership commitment

As the structure of the case indicates, the key driver of the Giving in Grace programme is to set and resource mission and ministry priorities. To do this requires reflection on the stewardship culture of the church and a robust understanding of the present financial situation.

Building the case statement
The case is foundational and its preparation structures the early work of the planning group and helps the group to gel together. So don’t rush a process that will reward time invested and must be rooted in prayer. Some preparatory work, especially the financial analysis, will be done by a single person. It is important that this preparatory work is complete when the planning group meets together, or delay is inevitable. Other work, for example the stewardship reflections, are necessarily discussions within the planning group. As the planning group works through the case, one person, usually the chair, should draft the text of the case statement. That first draft must be discussed and amended until the planning group feels it has an agreed case to present to the church council or leadership team.

Engaging the leadership
When giving initiatives make little impact, the reason is often traced to a failure of the leadership to be advocates of the programme in the congregation. Experience indicates that leaders can voice their opinion and vote for the programme but then fail to respond personally themselves.

The consultation questions in Section 7 of the case serve two purposes. First, consultation helps build consensus and ownership by the church leadership. The case is a work in progress; leader input is invited and welcomed and the case is revised in the light of feedback. If consultation can be done in one-to-one conversations between leaders and planning group members, so much the better.

Second, the case takes the pulse of the commitment of the leadership team, both individually and as a body, to the case, to the programme and to the necessity of thoughtful, personal response. For St Paul, the Jerusalem offering was a gentle test of the Corinthian church (2 Cor. 8:8); the case serves a similar purpose.

Leadership interest and involvement means greater investment – personally and financially – and this will be made visible in the programme. Planning group members and the church leadership should be the first to return their response forms. It is recommended that the total financial commitment of the church leadership (e.g. a total giving increase of £97 per week towards the total shortfall of £230) is communicated in the letters to the congregation. Leaders model the generosity they seek from the congregation.

Conclusion
The case statement is a key document in gathering baseline data, stewardship reflections and presenting a ministry plan and a range of gifts. Its lasting value lies in the consensus it builds among the leadership and the case can stimulate the development of vision and ministry over the next two or three years.