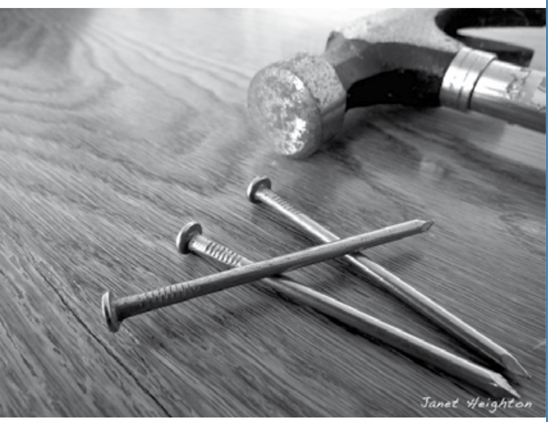
Laying foundations: the case statement

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 the King's resources. 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. The case is shared with the church leadership in expectation of critical evaluation, agreement and action.

So what is a case statement?

With large capital projects such as re-ordering churches know they must make a case and ask for money. A defunct boiler or a hole in the roof make the case all of their own! But with the day-to-day costs that release mission and ministry we tend to assume that if people know the need they will respond generously. Sadly, it does not work like that.

The case statement does what it says on the tin. It makes the case for giving generously. The idea will be familiar to anyone who has shared in a capital funding campaign. The case model is borrowed and adapted for stewardship ministry from the related discipline of capital fund raising.

A capital case sets out clearly the need (disaffected young people), the solution (a youth worker) and the cost (£50,000 per year). Harold 'Si' Seymour, the father of modern fund raising, 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 is not as all embracing but adopts some key insights. We start with a vision for local ministry goals, things that will make a difference in the next year or two, goals aligned to any strategic plan. Our case identifies the cost of ongoing ministry and mission alongside new pieces of work. It identifies a financial target broken into weekly amounts people can relate to. That weekly target is achievable through a gift array, a range of possible giving responses.

The case is a working document that captures the key data and purpose of the programme. It's not a glossy congregational brochure, nor a business plan. The mission and ministry resources needed are presented in the clergy ask letter, congregational brochure and response forms sent to church members.

The structure of the case statement

The case statement is in seven sections. The first two and final sections are conversational, initially the planning group and finally church leadership. The other sections are prepared offline, financial analysis which underpins the challenge to generous discipleship and adequate, even abundant resources for ministry and mission.

1. Reflection on the current strengths and weaknesses and any 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. Leadership consultation to hone the case, invite advocacy and litmus-test leadership commitment.

Building the case statement

After the Bible of course, the case is foundational and it's preparation structures the early work of the planning group. It may look a big ask, it's not. It can be done well and efficiently very quickly but it serves a rich purpose. Don't rush it, don't skip prayer.

A couple of initial planning group meetings can address Sections 1 and 2 as well as scope the other elements that *design the programme* and *prepare the literature* for Giving in Grace.

All the financial analysis is done offline, usually by one person. It can be discussed in a third, finance meeting or underpin the Section 2 stewardship discussion.

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 for the church council or leadership team.

Taking the pulse

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 or to be advocates in word and deed in the congregation.

The consultation questions in Section 7 take the pulse of the church leadership, serving 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 listens for healthy commitment from the leadership team, both individually and as a body. That's commitment to the case document, to the programme design and to the necessity of thoughtful, personal response. Leadership interest and involvement means greater personal and financial investment and that's made visible in the programme.

For Paul, the Jerusalem offering was a test of the Corinthian church's love and their response to grace (2 Cor. 8:8). The case is aligned to this rich purpose.

Conclusion

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