



## **BUILD A CASE:** Establishing Motivation for Giving StewardShop 104

### **Description**

In this 55-minute workshop, participants examine classic fund-raising principles for “building a case,” (i.e., providing a motivational basis for giving). Using a flow chart for developing case statements, participants complete a case statement for their own congregation, participate in peer review of their work, and pursue fundamental questions about this approach to establishing motivation.

### **Audience**

“Build a Case” assists congregational leaders and pastors in their task of presenting a compelling case for donors to contribute to God’s mission in and through their congregation.

### **Skills**

Participants in this workshop will develop a useful “case statement” (i.e., an expression of mission) for their congregation.

### **Materials**

- Handout, “Building a Case Statement,” one per participant
- Handout, “Case Statement Flowchart,” one per participant
- Handout, “Our Congregation’s Case Statement,” one per participant
- Handout, “Thoughts About Case Statements,” one per participant

### **Schedule**

Presentation, “Building a Case Statement”	(15 minutes)
Completing a Case Statement	(10 minutes)
Peer Review	(15 minutes)
Parsing Possibilities and Problems	(10 minutes)
Wrap-up	(5 minutes)

## **WORKSHOP DESIGN**

### **Presentation, "Building a Case Statement" (15 minutes)**

Distribute copies of the handout, "Building a Case Statement, one per participant. Walk through the principles and guidelines on the handout, highlighting these basic ideals:

- Neither facts nor spiritual truth are the sole source for "the case".
- Most of the case for giving rests inside the members of the congregation, what they consider to be compelling in their lives.
- Participants can find two de facto listings of case statements, in items #5 and #7.
- One additional benefit for case statements: preparing congregational self-studies, evaluations or assessments.

You might want to provide some time for questions or comments on this worksheet, deferring "problems" and "what-if" questions until later in the session, when participants can look a little deeper. But first, participants will engage in guided practice in constructing case statements.

### **Completing a Case Statement (10 minutes)**

The activities in the workshop now center around the construction of a case statement. Distribute the handouts, "Our Congregation's Case Statement," and "Case Statement Flow Chart," one per participant.

Briefly characterize the seven-step process outlined on the handout, "Our Congregation's Case Statement." (The process is presented visually on the handout, "Case Statement Flow Chart," as well.) Participants spend the rest of the time completing Items # 1 – 3.

As participants engage in these tasks, they can refer to the previously-distributed handout, "Building a Case Statement," for content ideas. You might circulate through the room, looking for participants who need a jump start. Look for two possibilities that might prevent participants from writing:

- Participants come to the realization that their congregation's vision, mission or passions are NOT all that worthy of members' contributions.
- Participants have trouble reaching beyond the usual "churchy" language.

In either case, you might provide copies of the handout, "Thoughts About Case Statements," for participants' reference in advance of the activity, "Parsing Problems," later in the workshop. Above all, urge participants to put some words

down on paper even if they aren't perfect formulations. The intent here is start on the process, not to plan it perfectly.

### **Special Note**

Some participants may, by this time, have come to believe that their congregations do not deserve members' contributions, or that their relatively low quality – of leadership, programs, facilities, etc. – makes them inferior or unworthy. In short, some participants may think that they have no case for asking. If you sense this to be true – in participants' eyes, in their quiet comments, in the kind of questions they ask, or in their reluctance to engage in the activities of this workshop – you can help them by engaging the subject now. In that case, shorten this section or the following, and add time to the activity, "Parsing Possibilities and Problems." Still, encourage participants to at least try to discover the elements of their case statement before they give in to their feelings!

After the ten-minutes has elapsed, ask participants to form small groups of two or three persons each. The peer review activity that follows would be a good time for participants from the same congregation to work together.

### **Peer Review**

**(15 minutes)**

In their small groups, participants talk about their work on case statements, allowing time for each person to hear the comments of others regarding his or her work so far. Participants can engage each other in:

- Critiquing wording, ideas, or other content of a case statement.
- Offering suggestions about problems or "stuck places" in the process.
- Giving answers to specific questions small members need help with.

Small groups can parcel out the time as they see fit, keeping in mind that all groups members should have an equal amount of time.

### **Parsing Possibilities and Problems**

**(10 minutes)**

The group reassembles into a large group, for consideration of some of the problems and possibilities participants may encounter as they build case statements back in their congregations.

As you distribute copies of the handout, "Thoughts About Case Statements," ask participants to give the questions a quick look before you engage the entire group in these matters. (Participants might also want to refer to Item #6 on the handout, "Building a Case Statement," for other benefits of case statements.)

After about five minutes, direct participants to the handout's content with the question, "What do you do if, in all honesty, you don't believe you have a strong case for contributions?" The handout offers some help, but participants' own wisdom will add to the discussion.

The intent is not to answer all questions thoroughly, but to lead the group to see how "building case statements" can help congregations ask the necessary questions that help them face the possibilities and problems of renewing their spirit of ministry.

Take care not to make this a time of negativity or whining, but instead to offer participants some new ideas and strong hope for the process of motivating donors through case statements.

Other questions you might explore with the whole group include the following:

- How might you involve significant numbers of your congregation in the case statement building process?
- Who in your congregation is most capable of this kind of persuasive or inspirational work?
- What are the advantages and disadvantages of building several case statements, each suited to a different segment of the congregation?
- What else do you know about the actual reasons why members contribute to their congregations? (These may be spiritual or practical, or even mundane and shallow, but they are real.)
- How would you increase the pool of committed givers by the use of a case statement?
- What other positive consequences might come to you and your congregation from the work of building case statements?

### **Wrap-up**

**(5 minutes)**

Allow a few moments for final comments, thank participants for their attendance and attention, and offer a prayer of thanks for these people of God and their faithful service.



## **BUILDING A CASE STATEMENT** Principles and Guidelines

The case statement is a necessary ingredient in successful mission-funding. Its words can portray the compelling mission of your congregation and connect it with the spiritual yearnings of members who will ask for (and offer) contributions. Use the items here to help you develop your congregation's case statement.

1. **"The case" already exists.** You do not have to invent your congregation's mission, passion, objectives, or purpose. Nor do you have to create those same feelings inside congregation members. Your task is to connect members' inner motivation to fulfill God's will in their lives with elements of the congregation's mission.
2. **The case is factual.** The compelling opportunities your congregation faces (including the needs you fill), and the overwhelming assets you have been given to accomplish God's will – they can all be expressed in factual terms. Numbers, places, people, quantifiable data.
3. **The case is spiritual.** At the same time, "the case" is a spiritual matter framed by the question each believer faces every day, "Lord, what would you have me do?" The Spirit's gifts compel you to assemble emotion, facts and the motivation for specific ministries.
4. **You can discover the case.** Start with your knowledge of congregation members' sincere passions for their lives and this congregation. What do they want to do in order to fulfill God's purposes? Next, look at the congregation's documents, history and artifacts to see how the mission of the congregation matches members' spiritual yearnings for their lives. These are your resources for developing a "case statement."
5. **Ask questions before making statements.** An accurate and compelling case statement starts with good questions, such as:
  - What is central to our faith, our lives, or work together?
  - What is it about our God that compels us to what actions?
  - What is important about what we do here?
  - What happens in God's realm because we are here?
  - What are our unique competencies and assets for doing God's will?

- What benefits accrue to donors/members?
- What values do donors fulfill by giving to this congregation?
- What are donors' interests, concerns, prejudices, conditioning and giving patterns?
- What motivates donors?
- What (in and beyond your congregation) excites, changes or challenges donors?
- What is unique to your congregation's mission?

You write the case statement when you have reasonably accurate answers to these (and other) questions.

**6. A case statement has multiple benefits.** Although its major purpose is to encourage givers, a case statement also serves as a basis for evaluation, prioritizing and decision-making in your congregation. A case statement can also:

- Attract donors who are not members but value the congregation's mission.
- Project competence and excellence.
- Focus and unify the process of asking for contributions.
- Enlist leadership.
- Provide basic language for fund-raising materials

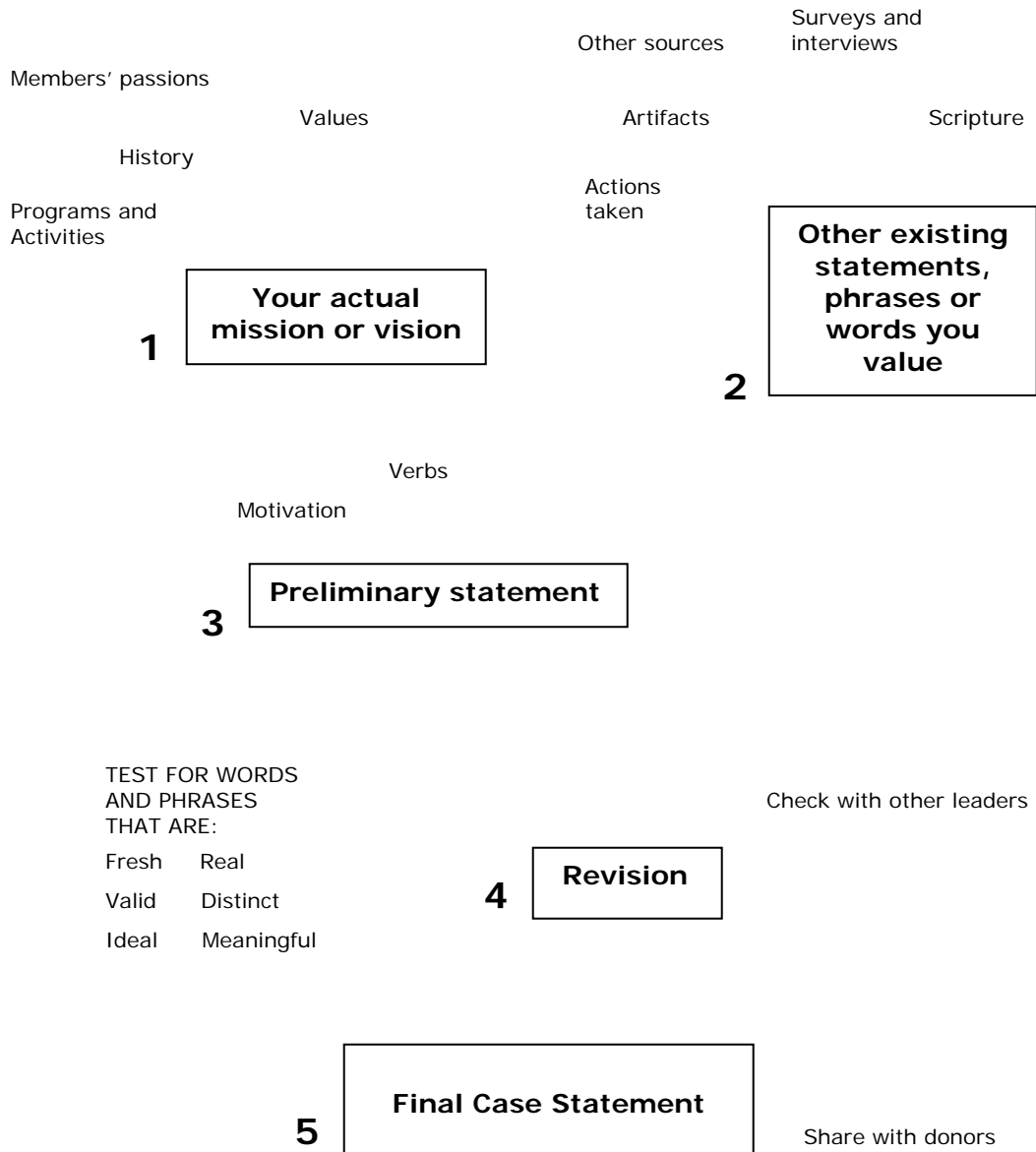
**7. A case statement must be complete and concise.** The case for giving can include the mission, goals, objectives, programs, key participants, facilities and equipment, and history of your congregation. Each element should be presented in clear, concise language that can be understood by all donors. Donors should readily understand what your congregation desires, what's in place, what happens because of your life together, what is your congregation's character and strength, the validity and credibility of your history, and what contributions will accomplish.



# CASE STATEMENT FLOW CHART

## Steps to Take

One good way to develop a case statement is to follow an orderly process that includes all the necessary elements of a case statement. The flowchart below is one example of such a process.



Adaptations for other uses



# OUR CONGREGATION'S CASE STATEMENT

## Building a Case for Contributions

The first and primary "case" for donors is what God's Spirit has placed in their hearts: faith, generosity and care for others. By building a "case statement" you help donors focus their commitment to use God's gifts to fund God's mission through your congregation. Complete items on this tool to begin constructing your congregation's case for giving.

**1. Describe your mission or vision.** Use phrases or words that characterize members' passions, their values, the programs or activities of your congregation and the history of your congregation's vision.

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**2. Add other words, statements or phrases you value.** Think about actions your congregation has taken, positions you hold on issues, Scripture passages that summarize your work together, the results of congregational surveys or interviews, or what the artifacts of your congregation say about you. Where do you get the other words that describe who you are?

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**3. Write a preliminary statement that describes your congregation positively.** Sift through all the words and phrases and find some that describe your life together in terms that a visitor could understand. Use strong verbs. Be proud of what God does through your congregation!

**Compelling opportunities**

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**Factual data**

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**Special assets (and people)**

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**Unique characteristics**

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**What this congregation accomplishes**

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**What might excite donors**

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**4. Review what you wrote.**

Check your writing for statements that are compelling because they are fresh, valid, and real. Look for ways in which the "case" for giving is framed by meaningful language that sets out the ideals you seek as a congregation. What would other leaders notice and change?

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**5. Think about the donors.**

What do you know about the people for whom this case statement will be exciting and compelling? What motivates their generosity? What about this congregation is valuable for their lives of stewardship? What will excite them?

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**6. Revise the statement.**

Rewrite the statement with the work you've done in Nos. 4 and 5 above.

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**7. Decide how you will use the case statement.** How will it be shared in your congregation? How will it be adapted (e.g., excerpted, summarized, split into pieces) for other uses?

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**Other Notes**

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## **THOUGHTS ABOUT CASE STATEMENTS** Problems and Possibilities

Case statements are probably good ideas for your congregation's stewardship ministry. But there may be problems and possibilities that are not easily seen or talked about. This page will help you dig deeper into this matter, so that you can use case statements effectively.

### **QUESTION: How hard is it to build a case for funding our congregation's ministries?**

ANSWER: This is not easy work, especially if your congregation doesn't easily talk about the basic question, "Why does this place continue to exist?" Keep trying, though, and don't make the matter too complex. The reasons why people might give to your congregation are already inside of *them*, because of the Holy Spirit. God's own nature is the most compelling "case for giving," and that's where you start.

### **QUESTION: How well can we "build a case for giving" when we carry around real or imagined inferiorities about our congregation?**

ANSWER: Not very well, because you're going to invisibly present yourself to donors as an unworthy recipient of their stewardship.

### **QUESTION: How do we get over the inferiority and on to other things?**

ANSWER: Find what's good and right and true and exciting and ennobling about your congregation, no matter how small or seemingly invisible it may be. Put into positive terms that part of God's mission. See what connects (e.g., what are the causes, what else happens, where all this could go next) and include that in your conversations. After awhile, collect all the thoughts together and pile them on top of your "inferiorities." Now try the case statement writing again!

### **QUESTION: How big or long or comprehensive should a case statement be?**

ANSWER: Only as big as the case it states! Simplicity is admirable, as is direct language. Remember the variety of donors, and what might be a compelling case for each of them. Avoid complexity if possible.

**QUESTION: How do we avoid “churchy” language?**

ANSWER: In a meeting or conversation away from church, ask the question, “So how does this congregation add value to your daily life as a Christian?” Keep track of the words and phrases people use as they answer. Use this natural, conversational tone as you write or present the case for your congregation.

**QUESTION: Could “multiple case statements” be possible in congregations?**

ANSWER: Now you’re getting the picture! Yes, and even in a small congregation. Why? Because donors approach their giving from a variety of motivations, and each chance you give them – in a case statement, of course – to discover how God plants generosity in their hearts is another way you help them do what they want to do most with their lives: To serve God!

**QUESTION: Should we develop case statements if most everyone in our congregation knows why they give?**

ANSWER: Isn’t “if” a wonderful word on which to hinge an answer? And here’s answer: How can you be sure, and how could you find what additional excitement and energy lies inside of God’s people, unless you ask? And how could you provide more challenge and opportunity for them unless you make a case? (And, of course, how can you make a case unless you write it down!)

**QUESTION: Who else knows about case statements?**

ANSWER: Consult with workers in other non-profit enterprises, marketing and advertising executives, legislators and members of the legal profession, and especially generous folks who receive fund appeals from many organizations.

**QUESTION: Do you have any other hints?**

ANSWER: Thanks for asking! Try these few:

- Start the case statement process with conversations.
- Ask more than “the usual suspects” what makes them excited about this congregation.
- Include children and youth.
- Beware equating “the case for giving” with only your pastor’s ministry.
- Look at individual members’ lives of witness as a place to start.
- Pray for wisdom in this process, but also pray for an adventuresome spirit.
- Check out the case statements of other organizations.
- Remember that the case statement is not a theological treatise.
- Have fun with God’s surprising activity in your congregation!