



THE EPISCOPAL  
NETWORK FOR  
STEWARDSHIP

# Creating Compelling Case Materials

## Best Practices

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# Learning Objectives

1. What is the Case for Support?
2. Generational Differences in Donor Engagement
3. What elements go into a Case for Support?
4. How to put your case statement together

*Introduction*



# Your Case for Support

A case for support:

- ▶ **tells your story** in order to
- ▶ **connect your members** to your mission and vision and
- ▶ **build commitment** to your goals.



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# How to Begin

- ▶ Revisit your **strategic plan**
- ▶ (don't have a strategic plan?) What are **the goals of your ministry / ministries?**
- ▶ What **measurable impact** do your ministries have in your community (external & internal)
- ▶ The description of your desired (or proven) impact is **the grounds for your case** for support

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# What makes impact

- ▶ Your case should remind your members why their gifts are **important** by reminding them what **impact** they have
- ▶ Your case should **motivate members** to think generously
- ▶ Your case becomes the template for your **talking points** for your pledge campaign and your website



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# Doing the Work to Craft your Case

- ▶ **Draft** your Case for Support
- ▶ **Test** it on a small sample (not your vestry). Pick a few members from diverse backgrounds
  - ▶ Generational
  - ▶ Longevity of membership
  - ▶ Gender and ethnic identities
- ▶ **Refine** and change



*Don't forget the testing! It's important  
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# Advance class on Cases

*You may find the need to have multiple messaging tracs or cases*

- ▶ Do **newcomers** need their own case for support to become acquainted with your congregation's mission?
- ▶ Different **generations** are motivated by different factors
- ▶ Do you apply for **outside grant funding**? Consider developing a case for support that addresses the guidelines of community support foundations
- ▶ Do you receive **corporate funding** or funding from **local businesses**? They may want to see different metrics or impacts

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# Generational Differences impact Donor Motivation

*How you message to different generations matters*

- ▶ Let's take a look at how generational demographics impact donations in your community
- ▶ Yes, this applies to our churches, too!



*From Classy Fundraising Solutions, 2020*

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# The “Matures”

- ▶ Born before 1945
- ▶ 60% donate to their church
- ▶ 51% volunteer with their church
- ▶ Most interested in
  - ▶ Institutional support – they trust the institution
  - ▶ Pastoral care
  - ▶ The Church “being there” for them and future generations
  - ▶ Planned, Capital, and Annual Giving

*From the Lake Institute of Faith & Giving, 2019*

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# The “Baby Boomers”

- ▶ Born 1946 - 1964
- ▶ 48% donate to their church
- ▶ 49% volunteer with their church
- ▶ Most interested in
  - ▶ Wanting to know the finances before they decide to donate
  - ▶ The Church “being there” for them and future generations
  - ▶ Planned, Capital, and Annual Giving
- ▶ This is the wealthiest generation ever to have lived

*From the Lake Institute of Faith & Giving, 2019*

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# Generation X – The Lost Generation

- ▶ Born 1965 - 1976
- ▶ 38% donate to their church
- ▶ 60% volunteer with their church
- ▶ Most interested in
  - ▶ Far more interested in volunteering than donating to their church – or see volunteering as a first step
  - ▶ Less trusting of the institution, more interested in the work
  - ▶ Annual and Capital Giving
- ▶ This generation will inherit +\$40 Trillion in the next 15 years

*From the Lake Institute of Faith & Giving, 2019*

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# The Millennials

- ▶ Born 1977 - 1995
- ▶ 32% donate to their church
- ▶ 40% volunteer with their church
- ▶ Most interested in
  - ▶ Results – what is the church doing in the community and why does it matter?
  - ▶ Even less trust in organization and institution, more interested in donating to grassroots or defined ministries than to overall budgets
  - ▶ Largest online donors
- ▶ 84% of this generation donates to nonprofits, they are very generous

*From the Lake Institute of Faith & Giving, 2019*

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# Generation Z

- ▶ Born 1996 +
- ▶ By 20 years old 30% have made a donation to a nonprofit
- ▶ Most interested in
  - ▶ They want their work to make a difference, therefore their church needs to prove the same
  - ▶ 76% are worried about the planet, and want to see their faith communities do something about it
  - ▶ Prefer apps and mobile giving. They don't write checks
  - ▶ Least likely to pledge, but will give when asked
- ▶ This group makes up 40% of all customers – they have buying power, and they're using it

*From the Lake Institute of Faith & Giving, 2019*

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# Appealing to Late GenX, Millennials, and GenZ

1. **Show them results.** Gen Xers and Millennials are not motivated to give to simply maintain the status quo. They want to see results. They want to know how their sacrifice is making a difference. **Make a concerted effort to help people see how their giving is having an impact.**
2. **Focus on retention.** The number one goal is helping people understand the importance of regular consistent giving. This means **encouraging them to see the value of generosity as a discipline.** It also means using digital giving solutions as a way to promote recurring giving as an option.
3. **Encourage volunteerism.** The key to encouraging generosity among these generations is **emotional involvement.** They are much quicker to give when they're invested in the cause and work. By making volunteerism an organizational priority, you're making it easier for people to give.
4. **Don't Forget Discipleship** Ultimately, every discipleship and mentoring program needs to help people **understand how spirituality impacts their financial decisions.** The best way to do this is through the example and encouragement that comes from a one-on-one relationship.

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# The Story of your Case

- ▶ Your **History**
- ▶ Cause, Mission, **Impact**
- ▶ **Services** You Offer and Why
- ▶ How Members Can **Help**
- ▶ How You **Plan to Change the World** (or your Corner of It)

TELL US YOUR  
**STORY**

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# Elements of your Case

- ▶ Organizational History
- ▶ Whom you serve
- ▶ Needs and Challenges
- ▶ Evidence of Good Stewardship
- ▶ Goals for Future Ministry
- ▶ How to support



*Elements of a Case for Support*

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# How was your church founded?

- ▶ Who is your patron? If you know why they were chosen, that would be interesting
- ▶ Was there a founding family/families or a founding group?
- ▶ Why are you in that neighborhood or community?
- ▶ Were you a mission of another church, or a merger, or a plant? These make interesting stories
- ▶ Have there been / are there now important people in your parish?
  - ▶ Civic leaders
  - ▶ Nonprofit founders or leaders
  - ▶ Industrial or business leaders
  - ▶ Historically interesting people



# Who are your neighbors?

- ▶ What is the **character** of your community?
  - ▶ Up and coming? Established? Urban? Hard working?
- ▶ Who are the **people** served by your outward ministries?
  - ▶ Food programs; tutoring programs; senior outreach; childcare; immigrants; prisons
- ▶ Who are served by your **inward-focused** ministries?
  - ▶ Seniors? Youth? Sunday-School? College-age?
- ▶ Do you have support groups?
  - ▶ 12-step? Employment help? Ageing / Caregivers support? Young families?



*Elements of a Case for Support*

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# What do your neighbors need from you?

How do your ministries meet the needs of your neighbors?

- ▶ Having identified who your neighbors are, it's important to name the ways you serve them. **Be specific and comprehensive**
- ▶ While our neighbors do include the entire universe, it's best to focus on the local actions (e.g. food pantries) or **direct actions** (e.g. house-building in Central America)

*Elements of a Case for Support*



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# Evidence of Good Stewardship

*Transparent and Accountable Leadership is essential in churches*

- ▶ **Budget is accessible** on website or church bulletin board (best on the website!)
- ▶ **Fundraising goals are clear:** money, volunteers, and in-kind
- ▶ Vestry minutes are **published and accessible**. Vestry meetings are open.
- ▶ If there is a recovery plan from a period of economic challenge, **name it, give it a timeline, and outline steps being taken**



*Elements of a Case for Support*

# Leadership is forward-thinking

*Transparent and Accountable Leadership  
is essential in churches*

- ▶ What are your **goals for the future?**
  - ▶ New membership
  - ▶ New ministries
  - ▶ Strengthening what's good
- ▶ Are there staffing or building goals?
- ▶ Are there **predictable future events?**
  - ▶ e.g. The local food bank is cutting back, and we will need to increase our efforts

*Elements of a Case for Support*



# Giving is Easy: Here's how!

*Adopt as many methods for accepting donations as your staff and volunteers can effectively manage*

- ▶ **Online giving** platform/s
- ▶ **Mobile / App-based giving** platform/s
- ▶ Pledge forms or Intentions to Give are **easily available** (online is great!)
- ▶ Instructions on how to give by **ACH or bill pay**
- ▶ Instructions on how to give **securities**
- ▶ Reminder that members may give from their **required minimum distribution** (not in 2020) or **qualified charitable distribution**
- ▶ **Planned Giving** options are easy to find, and included on your pledge / intention cards

*Don't forget to include time and talent intentions, too!*

*Elements of a Case for Support*

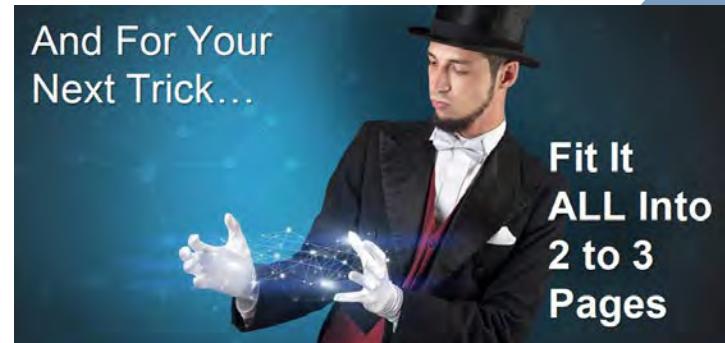


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# Case Support Craft

- ▶ Gather your information from the elements listed in the previous section
- ▶ **Make your ask specific** *A general ask yields a general result*
  - ▶ Financial goal
    - ▶ Is there a percentage raise you'd like people to consider? A stretch goal?
  - ▶ Volunteer goal
    - ▶ Ministry support, committees, guilds, events
  - ▶ New members goal
- ▶ Write a draft, first! *Don't forget to test it*

*Crafting the Document/s*



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# Case Statement Next Level Challenge!

*Simplified Case Statements show Impact!*



This year we will:  
**Serve** 5200 hot meals  
**Educate** 58 children  
**Gather** for 124 services  
**Provide** Christmas gifts for 100 unhoused kids

**Plant** and harvest a community garden  
... and so much more!

St. Swithen's has been  
Serving the Blue Hill  
Community for 108 years

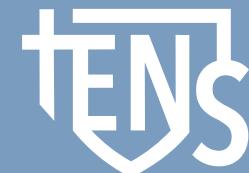
*Join us in doing God's  
Work today!*  
[www.stswiththens.org/donate](http://www.stswiththens.org/donate)  
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[www.paypal.com/stswiththenschurch](http://www.paypal.com/stswiththenschurch)



Front of  
3x5 card

Back of  
3x5 card

**Challenge yourself!**  
These are 3"x5" Case Statements. Can you get your case this tight??



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*Make your Case Compelling*

# What makes for a Good Case

- ▶ **Pictures** are important!
  - ▶ They tell the story
  - ▶ They show live, vitality, smiles!
  - ▶ Get permission, *especially if children are included, and absolutely if you will post on your website*
- ▶ Minimize your copy – **tight sentences, action-oriented words**
- ▶ **Use numbers** when possible for metrics and goals



*Make your Case Compelling*

# What makes for a Good Case, cont.

- ▶ Storytelling is essential
  - ▶ Testimonials come from a **diverse selection of members**
  - ▶ Consider testimonials or statements from people who benefit from your church's ministry, *if appropriate* (recipients of your food pantry, for example),
- ▶ Begin, continue, and finish with **gratitude** and examples of **generosity**

*Make your Case Compelling*



# Marketing Your Case

- ▶ If you choose to create a paper brochure, also take the time to **create a pdf version that can be displayed on your website**
- ▶ Challenge everyone in the congregation to **develop their speaking points** (elevator pitch) about the mission of your church. *Everyone should be able to talk about what you do and why*

*Make your Case Compelling*



# Other Stewardship Documents

- ▶ Line-item budgets are important, but they don't tell the whole story. **Don't allow your budget to control** the conversation about the case
- ▶ Develop **simple** pledge cards or intention cards. **Include an online form** on your website for people to submit virtually
- ▶ Consider including a **narrative budget**
- ▶ <https://www.tens.org/resource-library/tools-best-practices/creating-a-congregation-narrative-budget/>

**For every piece you create in paper, create an online version, and post to your website concurrently with your campaign materials**

*Make your Case Compelling*



# TENS Theme for 2021

The theme and image for ***Every Perfect Gift*** are wrapped in the metaphor of the butterfly and chrysalis.

To the ancient Greeks, the butterfly represented the image of rebirth and freedom. The word they used for butterfly was *psyche*, and if you are thinking that sounds familiar, you are correct! It also means spirit. The humble and beautiful butterfly contains the philosophical and spiritual idea of the soul breaking free from its shell — free to **discover, to inspire, to create, to communicate, to share. These are the results of our gifts of time, talent, and treasure**

*Keeping the Conversation Going*

  
***Every Perfect Gift***

  
***Cada don perfecto***



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Thank you!

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