



Making the Case! Designing for Impact

Best Practices

Cn. J. Davey Gerhard *Executive Director*
The Episcopal Network for Stewardship

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.



Case For Support

TENS | THE EPISCOPAL
NETWORK FOR
STEWARDSHIP

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

Case For Support



TENS | THE EPISCOPAL
NETWORK FOR
STEWARDSHIP

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



Case For Support

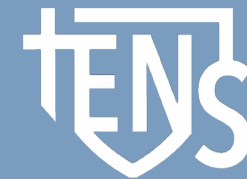
TENS | THE EPISCOPAL
NETWORK FOR
STEWARDSHIP

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

Case For Support

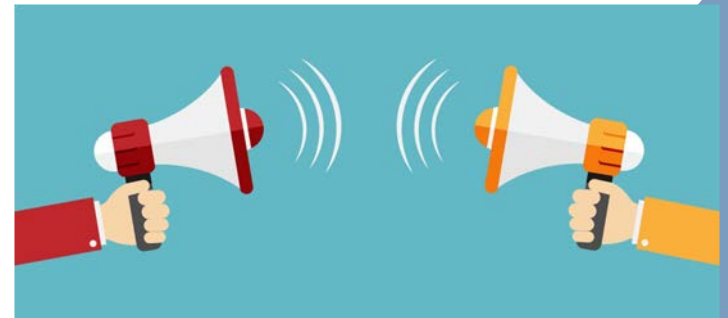


THE EPISCOPAL
NETWORK FOR
STEWARDSHIP

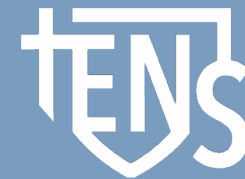
Advanced class on Cases

You may find the need to have multiple messaging tracks 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



Case For Support



THE EPISCOPAL
NETWORK FOR
STEWARDSHIP

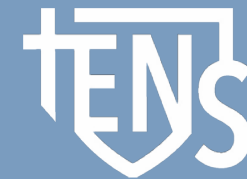
Generational Differences impact Donor Motivation

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

Case For Support



THE EPISCOPAL
NETWORK FOR
STEWARDSHIP

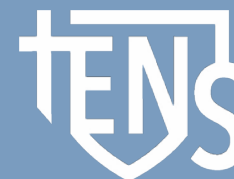
The “Matures”

- ▶ 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

Case For Support

MATURES
1945 & EARLIER



THE EPISCOPAL
NETWORK FOR
STEWARDSHIP

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

Case For Support

BABY BOOMER
1946-1964



TENS | THE EPISCOPAL
NETWORK FOR
STEWARDSHIP

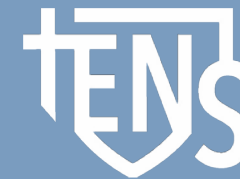
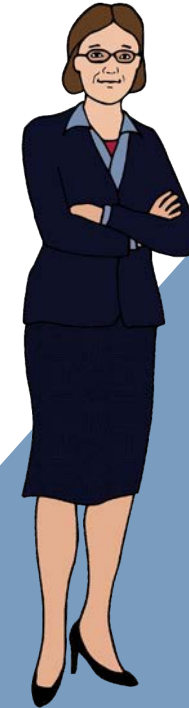
Generation X – The Lost Generation

- ▶ 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

Case For Support

GENERATION X
1965-1976



THE EPISCOPAL
NETWORK FOR
STEWARDSHIP

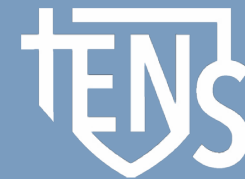
The Millennials

- ▶ 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
- ▶ 89% of this generation donates to nonprofits, they are very generous

From the Lake Institute of Faith & Giving, 2019

Case For Support

MILLENNIAL
1977-1995



THE EPISCOPAL
NETWORK FOR
STEWARDSHIP

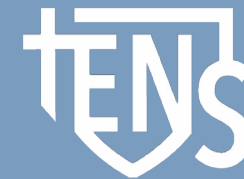
Generation Z

- ▶ Born 1996 +
- ▶ By 20 years old 30% have made a donation to a nonprofit
- ▶ 97% of this generation has made an online gift for a charitable purpose
- ▶ 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

Case For Support

GENERATION Z
1996 & LATER

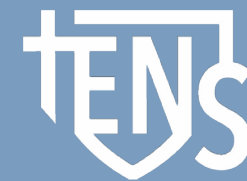


THE EPISCOPAL
NETWORK FOR
STEWARDSHIP

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.

Case For Support



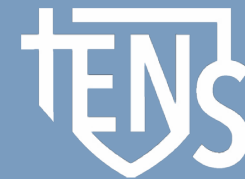
THE EPISCOPAL
NETWORK FOR
STEWARDSHIP

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

Case For Support



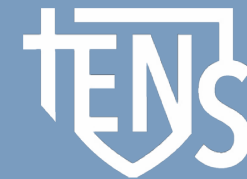
THE EPISCOPAL
NETWORK FOR
STEWARDSHIP

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



THE EPISCOPAL
NETWORK FOR
STEWARDSHIP

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

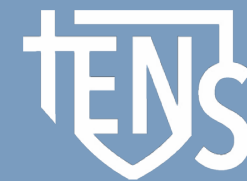


What do your neighbors need from you?

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



THE EPISCOPAL
NETWORK FOR
STEWARDSHIP

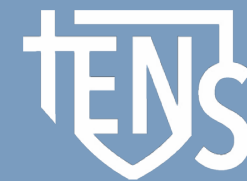
Evidence of Good Stewardship

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



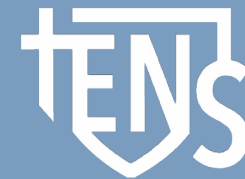
THE EPISCOPAL
NETWORK FOR
STEWARDSHIP

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



THE EPISCOPAL
NETWORK FOR
STEWARDSHIP

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



Did you miss our webinar on Virtual Stewardship 201? You can find it on our website at:
<https://www.tens.org/webinars-events/tens-webinars/virtual-stewardship-201/>



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



What makes for a Good Case

- ▶ **Pictures** are important!
 - ▶ They tell the story
 - ▶ They show life, 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



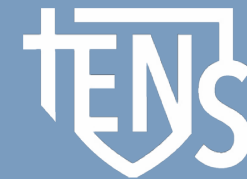
Make your Case Compelling

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

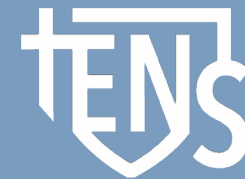


THE EPISCOPAL
NETWORK FOR
STEWARDSHIP

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



THE EPISCOPAL
NETWORK FOR
STEWARDSHIP

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

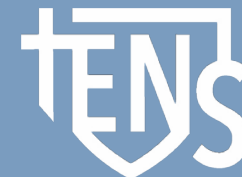
Make your Case Compelling

How to Create a **NARRATIVE BUDGET**

1. **CHOOSE** an image that best represents the church.
Examples might be the building itself, the congregation seated at services, or the clergy in action.
2. **WRITE** a short summary of the congregation and its mission.



St. Swithen's is a community of ... <summary of congregation and mission.> A narrative budget spreads fixed costs, like utilities, facilities, and salaries across program areas so that we see the impact of our money.



THE EPISCOPAL
NETWORK FOR
STEWARDSHIP

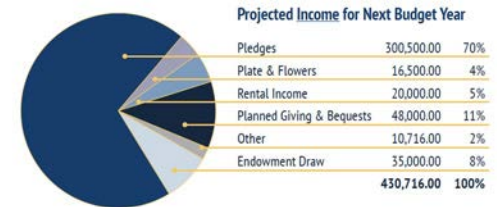
Narrative Budget

By describing your budget in terms of your ministry priorities, you are drawing a direct line between the dollars donated and the work being done.

Make your Case Compelling

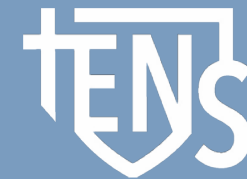
How We Fund Our Budget

Like many communities of faith, we **rely on pledges and gifts** from our members to support our ministry. Pledges account for 70% of our annual income, with plate offerings and other special offerings comprising another 6%. We are **entirely self-funded**. We do not receive financial support from the diocese for our operations.



How We Allocate Our Budget

Our budget reflects the values we shape and share with the world around us. Each of us in our varied ways, employing our many blessings and gifts, build a better world through our love of God, self, and neighbor. We align our budget with the work of our life together.



THE EPISCOPAL
NETWORK FOR
STEWARDSHIP

Case Statement Next Level Challenge!

Simplified Case Statements show Impact!



58 children

This year we will:
Serve

for 124 services

Gather

Provide

Christmas gifts
St. Swithen's has been
Serving the Blue Hill
unhoused kids **Plant** and
Community for 108 years
garden

and so much more!
Join us in doing God's

Work today!

www.stswithens.org/donate

www.tithe.ly.com/stswithens

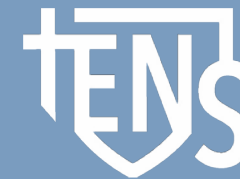
www.paypal.com/stswithenschurch



Front of
3x5 card

Back of
3x5 card

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



THE EPISCOPAL
NETWORK FOR
STEWARDSHIP

Make your Case Compelling

TENS Theme for 2023

The central act of Christianity is one of hospitality – invitation to abundant garden, the offering of that nourishment to all, and the reconciliation that comes by sharing a common act of love. Planted in such a garden of gratitude, we are Rooted in Abundance.

We are grounded in abundance, generosity, and welcome, and we share our gifts of wealth, works, and wisdom with the world in gratitude for having the opportunity to steward them.

*They shall be like a tree planted by water, sending out its roots by the stream. It shall not fear when heat comes, and its leaves shall stay green; in the year of drought it is not anxious, and it does not cease to bear fruit. **Jeremiah 17:8, NRSV***

Keeping the Conversation Going





Thank you!

For more information, resources, and videos, find us at www.tens.org

Password for 2023: Jeremiah17:8

Cn. J. Davey Gerhard,
Executive Director
415-869-7837 (o)
415-307-0172 (m)
davey@tens.org
www.tens.org