

UU Fundraising

Strategy & Plan



Subcommittee lead:

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Help wanted:

- Best practices facilitator
- 2016 event co-leads
- Event advocates – promote & support

Scope: fundraising beyond-

- Membership
- Legacy giving
- Philanthropy
- Youth group
- Weekly giving basket

Proposal – 24 month recurring fundraising calendar

Establish a routine to set expectations and establish support well in advance.

Avoid competing for the same resources. Only schedule multiple events, of any kind, simultaneously where there are synergies.

24-month recurring fundraising calendar

Lean on groups that don't tend to contribute - so we don't exhaust those that do

Seek group advocates to support specific events - so we don't burn out the usual volunteers

2016 Proposed Events					2017 Proposed Events			
General Timing	Event Description	Target Audience	Suggested Advocate	Proj Net Revenue	Event Description	Target Audience	Suggested Advocate	Proj Net Revenue
Fall (Sept-Nov)	Auction - services, vacations, activities, theme baskets, art, estate items	Members, friends & family (invite only)	Neighborhood Circles	\$35k-\$45k	Hoe down or Halloween haunted house or Fashion show	RE families	Young adult + youth groups	\$1k-\$2k
	General fundraising	UU Men	UGNO	\$1k-\$2k	General fundraising	UU Men	UGNO	\$1k-\$2k
Winter (Dec-Mar)	Jewelry & holiday sale - Costume & fine jewelry, seasonal décor, holiday baskets, crafts	UU women, public	UU Women	\$1k-\$2k	Jewelry & holiday sale - Costume & fine jewelry, seasonal décor, holiday baskets, crafts	UU women, public	UU Women	\$1k-\$2k
	Voices Café or music festival - church benefit - % proceeds to philanthropy	Members, friends, family, public	Social Justice + Choirs	\$2k-\$5k	Voices Café or music festival - church benefit - Percent proceeds to philanthropy	Members, friends, family, public	Social Justice + Choirs	\$2k-\$5k
Spring (Apr-Jun)	Spring performance or play	Members, friends, family, public	“UU performing arts”	\$1k-\$3k	Spring performance or play	Members, friends, family, public	“UU performing arts”	\$1k-\$3k
	General fundraising	UU Men	UGNO	\$1k-\$2k	General fundraising	UU Men	UGNO	\$1k-\$2k
Summer (Jul-Aug)	Tag sale - General merchandise with emphasis on estate items and collectibles	Members, friends, family, public	Small group ministry	\$10k-\$15k	Tag sale - General merchandise with emphasis on estate items and collectibles	Members, friends, family, public	Small group ministry	\$10k-\$15k
Total	\$51k-\$74k				\$17k -\$31k			

Completed and Next steps

- Get input from:**
 - ✓ YRSC
 - ✓ David Vita
 - ✓ Small Group Ministry Facilitators and personal SGM group
 - ✓ Neighborhood Circle 10
 - ✓ Mary and Cal
 - ✓ Rev. John
 - ✓ Dorothy and Anne
 - ✓ UGNO
 - Town Hall attendees
 - Board
- Gain church leadership support for operating principals**
- Finalize and publish 24 month calendar**
- Gather event implementation requirements :**
 - ✓ Linda Hudson (tag sale)
 - ✓ Chris Place (jewelry sale)
 - ✓ Doug Young & Tom Croarkin (poker-UGNO)
 - ✓ Music festival (Ken Lanouette)
 - Auction
 - Play
- Fill fundraising subcommittee positions**
- Secure formal advocates or group sponsors**
- Create fundraising suggestion / submissions process that includes YRSC check step before calendaring**
- Schedule 2016-2017 events on church calendar**
- Find co-leads for 2016 events**

Fundraising do's and don'ts

- Event must have both YRSC and business office **approval.**
 - Submission process to be developed
- Fits with and is appropriate for the **TUCW mission.**
- Can be organized and held during a **timeframe** that fits within the overall fundraising plan and other scheduled events.
 - We should avoid holding multiple events at the same time competing for the same audience.
- Is likely to yield **\$1000.00** or more.
- Doesn't increase **TUCW liability** and is within insurance parameters.
- **Doesn't promote** congregant's business or create a conflict of interest.
- Is appropriate for the **TUCW facility**, if held there (e.g., size, parking).
- If a public event, **no alcohol.**
 - Invitation only – can serve alcohol.
 - Prefer alcohol is donated and served by a licensed bartender.
- Bingo – **need permit** if more than annual event.

Pledges and legacy giving do not always cover expenses

- **This is our home.** So we're mutually responsible for pitching in and closing any financial gaps.
- **If we can approach fundraising more systematically and pro-actively,** we can reduce risk and increase our efficiency and effectiveness.
- **Taking an all hands on deck approach reduces the time and labor per person.** Thinking someone else will do it – is not an acceptable mindset for any one of us. We're all very busy – not one of us sits around all day with nothing better to do.
- **There are different roles we can each play.**
 - Co-lead facilitators– these are the orchestra conductors of the event. We'll provide them a roadmap to make their job easier.
 - Supporting volunteer – these are the doers. There are usually two types:
 - Behind the scene (do it at home)
 - At the event
 - Advocate and supporter – these are the promoters. They encourage others to become involved and to attend the event (including the public, family and friends). We should all assume we're promoters – taking a silent role is not an option.
- **We need to target more than the usual suspects** – as volunteers and financial contributors.
- **This will only work if the different committees talk to and coordinate with each other** – so we can support one another AND we don't compete for the same resources at the exact same time.
 - **I propose that we have a bi-annual meeting mandatory meeting for all committee chairs that includes our business office partners.**
- **This will only work if our church leaders and business office team sign-off on this charter and are visible advocates.** This process fails, for instance, the first time someone is allowed to schedule an event or activity that conflicts with the 24 month calendar whereby we lose focus and the resources needed to make the event successful.