

**Unitarian Universalists for Social Justice
Development Plan
(Revised 06-02-14)**

Summary

UUSJ shall pursue a development strategy that looks to its member organizations for funding all its basic operational activities, thereby freeing staff and officers to focus on the UUSJ mission, and programs and activities that support its mission. To this end, we will:

- (1) Encourage stable, predictable funding from member organizations, while providing those members with total flexibility in determining how to raise the money.
- (2) Grow the number of UUSJ individual members, as a means of developing support for UUSJ within member congregations.
- (3) Increase the size of individual donations, where feasible.
- (4) Seek foundation grants and sizable individual gifts for specific activities when justifiable in terms of programmatic content, but never for basic operations.

Implementation

By approving this Development Plan, the UUSJ Board of Directors acknowledges individual Board member responsibility to:

- (a) Communicate the specifics of the Plan to the professional and lay leadership of their congregation;
- (b) Work with their Congregational leaders to devise ways and means of achieving the Congregation's donation goals; and
- (c) Follow up with congregational leadership to ensure that the funds are delivered to UUSJ in a timely fashion.

A New Approach to Fund Raising

If UUSJ is to prosper, it requires a stable, predictable income source to meet its basic operational expenses. The best and most reliable source is the member organizations that it serves. If after almost a decade of operations, the member organizations do not value the services UUSJ provides sufficiently to finance them, UUSJ has little reason to exist.

Pursuant to this approach, UUSJ will seek approval from the Boards of its member organizations to establish a new way of financing UUSJ activities, as follows:

- The basic operations of UUSJ (base salaries, office expenses, etc) will be met by annual “fair share” donations for each member Congregations based upon size of Congregational membership. (See page 4 for illustrative fair share donations).
- Member Congregations will have total flexibility to determine how to finance their fair share donation (budget line item, plate collection, fund raiser, individual donations, pledges, etc.).
- The UUSJ board member from each represented Congregation will have primary responsibility for ensuring that his/her congregation’s fair share donation is forthcoming, assisted as needed by the UUSJ staff.
- Individual memberships in UUSJ will be encouraged, not primarily as a fund-raising mechanism, but as a means of generating support for UUSJ within each congregation.
- The annual fee for individual membership will be set by the Executive Committee at a level sufficiently low as to encourage broad participation.
- UUSJ programs (as opposed to basic operational expenses) will be financed by the following means:
 1. User fees (e.g. registration to attend a conference or workshop).
 2. Special event fund-raisers co-sponsored with other organizations (at least one per year).
 3. Grants from foundations or charitable organizations to carry out specific program objectives with measurable outcomes (At least one such grant application will be submitted annually).

Who is responsible for fund raising?

The short answer: Everyone.

The Development Committee is responsible for evaluating fund raising possibilities, making recommendations to the Executive Committee, and assisting Board members in carrying out their fund raising responsibilities.

The Executive Committee recommends fund raising strategies and priorities, oversees Staff activities relating to fund raising, and encourages Board members to take an active role in fund raising.

The Staff manages the paper-flow relating to fund raising, communicates funding needs and requirements to Board members and to UUSJ membership, and keeps the Executive Committee and the

Development Committee appraised of fund raising issues as they arise. The Executive Director makes direct appeals to donors for funds when directed to do so by the Executive Committee.

The Board of Directors approves development and fund raising policy and priorities. Additionally, every Board member is expected to participate directly in UUSJ development and fund raising activities in two ways: (1) by making as generous a donation as possible to UUSJ; and (2) by making direct solicitations on behalf of UUSJ among the members and friends of the organizations they represent to the Board.

Background Information

Historically, UUSJ income comes from 4 major sources:

- (1) Individual memberships and donations;
- (2) Congregational memberships and donations,
- (3) Foundation grants, and
- (4) Funds collected at UUSJ events, either as registration fees or as free will offerings.

In its early years, UUSJ relied heavily on foundation grants from UU-affiliated funding sources. In recent years these grants have steadily diminished. The FY 2007-08 budget contains no grant money. The prospect for additional grant money from UU-affiliated organizations is dim. Earlier funding from this source was start-up money. By now, UUSJ should be self sufficient.

Over the next few years, it may be possible to identify, apply for and perhaps receive, grants from non-profits and foundations for specific program activities. However, we cannot look to grants to sustain basic UUSJ operations.

Congregational membership fees have topped out, and are actually decreasing, because some organizations are not paying what they owe on time. Given the reluctance of many member organizations to pay membership fees at their current levels, it is unlikely that increasing membership fees would produce additional revenue. Indeed, such action might actually decrease revenue (delayed payments or withdrawal from UUSJ)

Thus, it is essential that we try out new and different ways to achieve the financial stability necessary to promote program growth, in order to better serve UUSJ member Congregations. This Development Plan responds to those needs.

STRATEGY FOR DEVELOPMENT PLAN IMPLEMENTATION

The material that follows does not require approval of the Board of Directors. It is provided for informational purposes, so that the Board members understand the implementation steps that have been and will be taken, subject to approval of the Development Plan by the Board.

Actions Needed During Remainder of FY 07-08

Recommendation (1): Obtain Board approval of a new approach to fund raising that establishes annual fund raising goals for each member congregation, while leaving it up to each congregation to determine how to raise the money.

- Target Date for Completion: June 2014
- Lead Action: UUSJ Co-chairs
- Other Participants: Executive Committee
Development Committee Members
Board Members
Staff (Terry and Cyn)

Actions required:

June 2014: Approval by Executive Committee of “New Approach to Fund Raising” (action:) Status:

June 2014: Approval by UUSJ Board
(action:) Status:

June 2014: Letter to Board members from UUSJ executive director explaining “new approach” and requesting Board members to brief Congregational leaders and seek their support. (action:) Status:

July 2014: Personal follow-ups with Board members after these letters go out by UUSJ Development Committee to ascertain progress and test how the plan was received. (action: Board members)

June 2014: Letter from UUSJ Executive Director to the Ministers of member congregations describing “new approach” and requesting ministerial support in implementation. (Action:) Status:

June 2014: Letter to Congregational lay leaders from UUSJ co-chairs describing “new approach”.
(action:) Status:

July 2008: Implement “new approach” (action:)

Recommendation (2): Increase the number of individual members and/or donors. Target is to achieve a 10 percent growth per annum for the next four years (2008-2011).

How #1: The UUSJ Executive Committee should take the following steps:

- Establish a graduated level of rewards and benefits to accompany individual membership. For example:
 - \$50 entitles the member to the newsletter and other announcements of UUSJ events.
 - \$100 donation entitles the donor to attend UUSJ Board meetings and to speak from the floor on issues of interest.
 - \$250 donation entitles the donor to attend UUSJ workshops and events at half cost.
 - \$500 donation entitles the donor to attend all UUSJ workshops and events at no cost.
 - \$1,000 donation includes a second “free admission” to all UUSJ workshops and events.
 - \$1,500 donation entitles the donor to a “member at large” voting seat on the UUSJ Board of Directors.

How: #2 Board members take on responsibility for increasing the number of individual UUSJ memberships in their congregation. Targets are set by congregation based on size.

- Board members will use their own judgment in determining what will work best in their congregation to encourage individual memberships at the various levels in their congregation.
- One approach would be to approach previous donors to UUSJ and other leading social activists on an individual basis.
- Another approach would be for board members to form a small nucleus of “Friends of UUSJ” within each congregation to assist in fund raising activities and recruiting new donors.
- UUSJ Development Committee will provide support and assistance as needed, including talking points and instructions.
- Smaller congregations (under 100 members) may wish to consider goal of 100 percent of membership as donors (similar to the UUSC approach).

Proposed “Fair Share” Donations by Congregation (For Illustrative Purposes Only)

Attached are contributions needed from each member congregation, based solely on size of membership, in order to meet UUSJ’s operating budget. These figures make no distinctions among membership dues, individual memberships, or donations.

Recommendation (3): Follow-up on collecting dues and voluntary gifts from member congregations.

- Target date for completion: June 30, 2014
- Lead: Staff (Terry and Cyn)
- Other Participants: Development Committee Co-chair, Board Members

Actions required: (to be determined by Lead) Status:

Recommendation (4): Follow-up on soliciting and collecting emergency donations from individual members and supporters.

- Target Date for Completion: August 2014
- Lead:
- Other Participants: Development Committee Members
Board members
Staff (Cyn)

Actions required: (to be determined by Lead). Status:

Recommendation (5): Conduct a fund raising event during the summer of 2014.

- Target Date for Completion: Fall 2014
- Lead Action:
- Other Participants: Development Committee Members
Staff (Terry and Cyn)
Board Members

Actions required: (to be determined by Lead) Status:

Recommendation (6): Apply for foundation grants or sizable private donation in support of specific project or projects.

- Target Date for Completion: October 2014
- Lead Action: Development Committee Co-Chairs
- Other Participants: Staff (Terry and Cyn)
Development Committee Members
Executive Committee Members

Actions Required: (to be determined by Lead) Status:

Drafted: Hal Fuller (11/14/07)
Redrafted: Hal Fuller (02/02/08)
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