

## UUSJ Development Committee

### Report to the Board Chair and the Board of Trustees

July 1, 2021

First, we congratulate you on being elected as the first Chair of the new Board of Trustees and our congratulations also go to the rest of the new Board. We are excited about the unfolding of this next chapter in the life of Unitarian Universalists for Social Justice, and we plan to assist you and the new Development Chair (DC) in the coming year.

We thought it would be helpful to recount the DC's accomplishments over the past year and to relate where we think the fundraising activities should be centered in the coming months.

The members of the outgoing DC consist of the following people: David Strauss, Chair, Gary Magnuson, Bob McCarthy, Dean Wanderer, Eleanor Piez, Peter Bishop, Pablo de Jesús (ex officio), and Bob Denniston (ex officio). Each member has a specialty that has been invaluable in our efforts. Of course, the committee works closely with Pablo to assure that what we do aligns with his goals and work plan, and Bob D. keeps us focused on the needs of UUSJ and its potential in the area of funding.

The DC began about four years ago as a very small ad hoc group whose members saw the need to fill a looming structural funding gap. We were and are aware that grants from traditional funding sources (foundations) would be unlikely to be obtained for our main work since our main focus is advocacy on Capitol Hill and at the Executive Branch of the federal government. Most foundations are prohibited from engaging in or funding such activities. Fortunately, UUSJ has been getting grants from the UU Funding Program each year for the past number of years to facilitate our transition from education to advocacy. It is a relatively small grant that does not do enough to enhance our ability to grow and intensify our mission. However, we hope you will continue to reach out to UUSJ when the next funding opportunity arises. Most of the grant seeking process should focus on non-UU sources most of which have much greater resources.

We do have a grants subcommittee that is seeking potential programs that are fundable by grant makers, and hopefully that search will begin bearing fruit in the near future. That subcommittee involves Eleanor Piez who is now a member of your Board. The grants subcommittee is awaiting completion of the Strategic Plan we are operating under which includes installation of all of you as the new Board. We are advised that organizational stability and installation of new leaders are important to grantors when they are considering applications

During the past year we held a celebration of our twenty years of existence via a virtual gala that attracted some 307 people, a stunning number of attendees and far beyond expectations. We had a goal of grossing about \$12,000 and spending around \$2,500. We exceeded the gross by about \$2,000 and came in under budget for expenses. Bob McCarthy oversaw the event and did an amazing job. This represents the most successful single event in this committee's short history.

We also assisted Pablo de Jesús in several campaigns, some of which involved our working together with John Peterson and the rest of the Membership Committee which he chaired. We helped advise Pablo on the new member campaign, participated in the “appreciative inquiry” effort, and recruited testimonials for various fundraising actions. We also assisted in “unlocking” large donations via matching funds from other donors. I’m happy to say that this worked well and all the large donations were matched.

The DC is in the midst of planning the biennial Social Justice Awards Gala now set for October 9, 2021. We realize that this is part of your responsibility, but we and Pablo felt that the only way this event could be successful in the fall is if we began the planning this spring. We will be pleased to assist the new DC and Pablo in making sure that this event is successful.

**In the coming couple of years I see some special needs for development that will require intensive work.**

Primarily, UUSJ will need to establish a base of funding that guarantees that we meet our budgetary expectations. This includes, but is not limited to, an annual budget that will support the salary and benefits of a full-time executive director and a full-time administrative assistant. Right now they are both half-time.

Here are some ways this can be accomplished:

1. Congregational memberships must be greatly expanded and a firm price set for such membership. Of course, there will need to be at least some benefits accruing to congregations for becoming members of UUSJ. The outgoing Membership Committee has worked up a plan for these tasks and you will soon hear from them.
2. Grants must be pursued, probably based on projected needs of the Action Teams. The largest and most active teams should be the first to make program proposals and a subcommittee of the DC should hone them into grant proposals. So long as such proposals do not involve direct or grass roots lobbying, there are a multitude of possible grantors. As a part of this process UUSJ must determine its indirect or administrative cost rate. UUSJ should never again, in my opinion, accept a grant that requires administrative work but does not help pay for it. The UUSJ Action Teams are the best places to begin generating ideas that can evolve quickly into proposals. The grants subcommittee can work with Pablo to seek and cultivate the appropriate funding sources.
3. Individual memberships to UUSJ must be greatly expanded and an appropriate dues rate established. Currently, new members are asked to pay \$60 per year or whatever they can afford. That may be appropriate going forward, but that will be your decision.
4. Courting wealthy/well off donors for large annual or periodic contributions. Many organizations receive gifts in the \$25,000+ category each year or at major events. We do not, and this needs to change.\* The path to doing this is unclear, so hopefully the new DC will have some good ideas.

I am sure there are other techniques I have not mentioned. It would, I believe, be helpful to obtain fundraising advice in this area and in the areas of items #3 and #4 above from a development professional.

In closing, I think I speak for the entire DC in our pledge to assist you in whatever way you wish to bring the stable and sufficient funding base to UUSJ that we all seek. If you need more information please don't hesitate to contact me.

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\*We did receive an unsolicited anonymous donation last year of \$25,000. It was earmarked for a specific purpose and did not serve to offset any of the considerable administrative time that had to be spent on the tasks it prescribed. As it was anonymous, the DC has no way of approaching the donor for further possibilities.