

DRAFT Annual Fundraising Plan - UUSJ

Quantitative Goals for Fiscal Year 2021-22

| | <i>Proposed Amended Budget</i> | <i>Actual 12/7/21</i> | <i>To be raised</i> |
|---|--------------------------------|-----------------------|---------------------|
| Congregational Memberships/Gifts: \$26,000 from ~20 congs/communities | 26,000 | 7,795 | 18,205 |
| Individual Major Donors (\$1,000 up: \$10,000+ from 5+ households) | 10,000 | 8,421 | 1,579 |
| Individual Donors up to \$999: \$34,000 from roughly 150-200 households | 34,000 | 9,613 | 24,387 |
| Match Funds committed by UUFJ \$3,000 (our part is included in individual donors) | 3,000 | 0 | 3,000 |
| Combined Federal Campaign (federal employees payroll deduction) | 5,000 | 2,745 | 2,255 |
| Fundraising Event on 11/7/21 | 10,000 | 8,645 | 1,355 |
| Total | 88,000 | 37,220 | 50,780* |
| Total 2021-22 income target per proposed budget amendment | 87,960 | | |

*\$1 off due to rounding error

Activities for Calendar Year 2022 – Fundraising (all board members are requested to participate)

| When | Total Individual Donor Base | Individual Major Donors | Congreg Member/Donors | Grants – Executive Director |
|-------------------|---|---|--|---|
| Q1 Jan-March 2022 | <p>Build Fundraising/ Communications Toolkit to contain:</p> <ul style="list-style-type: none"> -Background on UU-ism and our unique role for non or new UU’s (half page ish) -History of UUSJ (1-2 paragraph) -Elevator pitch samples -Mission and vision -What is the substance of our advocacy and engagement – action team etc. 1 page -Who we are and why give/why now (1-page with bullet pts) | <p>Beta-test toolkit with selected major donors; initiate/ maintain personal contacts; informal “listening campaign” to make sure all major donors receive a personal outreach & opportunity for update from UUSJ during this quarter</p> | <p>Need to sort out how to augment and work with Membership team to intensify outreach and bring in at least 19 more congregational gifts averaging ~\$1000</p> | <p>ED will lead in this area. Pablo to assess and strategize</p> <ul style="list-style-type: none"> – what organizational relationships should we prioritize? – what research is needed to identify funders who would be a good fit for existing programs? – what volunteer roles would be helpful for research and relationship building? |

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|------------------------------|---|---|---|-----------------------------|
| | <p>-Segmented pieces for different audiences that can be copied/replicated in different platforms & venues - TBD</p> <p>-Fundraising Deck powerpoint</p> <p>-2 min Tiktok video</p> <p>Fundraising Training – send at least 2 people in Jan-Feb</p> <p>Train board and others to use, test, and refine toolkit; develop further plan to do: Base building/ outreach/ calls, individual contacts, and small group events to introduce UUSJ – focused on informing about our work and gathering feedback – not a direct ask yet - Widen our reach to new potential partners/ participants</p> <p>Direct appeal to Immigration Action Team as another test of toolkit items</p> | | | |
| Q2 April- June 2022 | <p>Spring appeal focused on informing and involving people – including organizational action/ work plan for summer & fall as substantive elements of toolkit – not sure of mechanism – small events like house parties online or in person? Maybe go region by region or state by state? “High Touch” with backup from larger communication strategies.</p> | <p>Private event/ info session (s) for larger donors – focus on work plan, budget, use elements of toolkit as appropriate, ED and a board member could co-lead this</p> | <p>Continue outreach to bring checks in by 6/30 – working with congregational leaders and admins</p> | <p>See above</p> |

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|----------------------|---|--|---|-----------------------------|
| Q3 July – Sept. 2022 | <p>Direct appeal to Action Teams/ active participants in advocacy - for new program year - With toolkit and updates</p> <p>Need to strategize on how to reach active participants in advocacy who are not on Action Teams - regional? State-based?</p> <p>Consider name change and rebranding – need full scale professional support, could we get an underwriter?</p> | Plan full-scale fundraising event – theme tied to mission. Should it be free to enter with all fundraising happening DURING the event? Also, ongoing updates, strategically using Salsa and soc media to follow up on spring relationship building, integrating with Action Teams. Higher tech follow-up on high-touch spring activity | Circle back around with our key contacts in congregations/ other orgs ... identify which of our programs is most meaningful to them and make sure they are accessing those... prime them for repeat gift in spring but no direct ask, instead identify how to involve them more deeply and leverage their engagement for content wins | See above |
| Q4 Oct.- Dec. 2022 | End of Year appeal – build out to include mail and various electronic formats, use Giving Tuesday to get a buzz going? ... other regular activities such as testimonials? | Targeted personalized EOY appeal to the large donors Semi-annual zoom for major donors “state of the work” - separate from appeal – maybe right after election | See above. Fit activities to national election 11/22. Keep in touch with congregational leaders who may also be individual donors. | See above |