Possible Revenue-Generating Activities:

A Summary Report

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Executive Summary

UUCSV is on the cusp of becoming a mid-sized congregation as defined by the Unitarian Universalist Association of Congregations (150 to 250 members). Growth opens up new opportunities but also poses many new challenges, including the challenge of raising sufficient funds to support the expanding activities of the church. Recognizing the realities involved, late last year the UUCSV Board of Directors asked Church Treasurer Bob Gettings to identify potential new revenue sources and analyze the costs and benefits involved in exploiting each proposed approach.

With the assistance of other UUCSV volunteers, Mr. Gettings assembled a list of possible new fundraising activities, identified the pros and cons associated with each approach, and developed proposed selection criteria. Subsequently a membership survey was conducted to obtain feedback on the level of congregational support for the various options. The purpose of this report is to summarize the findings of the membership survey, suggest several conclusions which might be drawn from these findings, and recommend actions the UUCSV Board might take in an attempt to expand and diversify available sources of church revenue.

Key Findings. The membership survey revealed widespread support for a number of new fundraising activities, including leasing space to a local social services agency during weekdays, promoting special event rentals, leasing space to erect a cell tower, and selling additional goods (logo T-shirts & mugs, a UUCSV cookbook; and holiday baskets). But, a majority of respondents indicated they were unlikely to participate in other proposed fundraising activities, including purchasing Shaklee products, accommodating out-of-town guests in their homes, transporting travelers to and from local airports, participating in a mobile work crew, and attending regularly scheduled spaghetti dinners.

Two main barriers to implementing many of the proposed fundraising initiatives were identified during the course of the study: (a) uncertainty about whether enough volunteers could be recruited to make a particular fundraising initiative viable; and, (b) uncertainty about whether the church will be able to find outside agencies interested in leasing space. In the case of activities which would require extensive volunteer involvement, the survey results raised doubts about whether enough volunteers could be found to effectively initiate the proposed fundraising activity and sustain it over time. The leadership void – i.e., a member of the congregation willing and able to spearhead the fundraising effort – was a particularly serious barrier with respect to launching a local UU’re Home program, expanding special event rentals, initiating an airport transit service and organizing and dispatching household work crews. In contrast, a long-term lease agreement, once established, would require minimal volunteer and staff involvement to maintain. However, in both the case of leasing space in the church building and on church property (to erect a cell tower), preliminary inquiries have failed to uncover
parties interested in entering into such a lease agreement. And, while the search shouldn’t be abandoned, there is no assurance that acceptable lessees will be found.

Conclusions. None of the proposed fundraising approaches are self-executing – i.e., volunteers would be required, to one extent or another, to organize and carry out the proposed fundraising initiative. Because the time and energy of church volunteers are finite, one must assess the comparative amount of work involved in setting up each fund-raising initiative and maintaining it over time. In raising funds, volunteer resources need to be used judiciously; otherwise, the church’s capacity to pursue other important components of its mission could be seriously compromised. Indeed, the chronic problems which UUCSV currently faces in recruiting committee members and filling key leadership posts suggests that a careful assessment of the overall deployment of volunteers should be completed before launching any new fundraising initiatives.

Recommendations. None of the proposed alternatives appear to be a “slam-dunk” solution to the funding problems facing UUCSV. There is no firm basis for concluding that many of the proposed revenue generating activities (spaghetti suppers; expanded commodity sales, airport transportation charges, etc.) would add significantly to future church revenues. And, while it can be argued that “every little bit helps,” there is also the possibility that new revenue-generating activities would lead to reductions in income from existing revenue sources. After all the target audience (UUCSV members and friends) is essentially the same in all cases and there are limits to the amount congregants are willing to spend.

The few approaches with significant revenue raising potential have other impediments to implementation. Either church leaders have been unable to find a willing partner (as in the case of renting building space or erecting a cell tower) or no one within the congregation has expressed a willingness to oversee the proposed fund-raising activity. In either instance, progress is blocked unless these basic impediments can be removed.

In reviewing the merits of new fundraising initiatives, the UUCSV Board of Directors should adopt a broad perspective on the current and future financial needs of the church. In particular, the Board’s inquiry should encompass the possibility of investing the time and resources it would take to launch new fundraising initiatives in improving the effectiveness of existing fundraising activities. There are sound reasons to believe, for example, that annual pledge payments, Sunday services collections and grocery card sales can be substantially increased. However, considerable time and energy would be required to accomplish these objectives and, given the finite resources available, choices regarding the optimal deployment of volunteer resources will need to be made. The key question the Board must answer is: which of the following approaches is likely to have the greatest impact on increasing church
revenues and stabilizing UUCSV’s finances over the long haul: (a) improving the effectiveness of existing fundraising activities; or (b) launching promising, new fundraising initiatives.

Regardless of the course the Board elects to pursue, there are a series of steps related to the proposed, new fundraising approaches which should be considered. These steps include:

- delegating to the Building Committee responsibility for continuing the exploration of potential space rental opportunities;

- delegating to the Grounds Committee responsibility for locating a telecommunication firm interested in leasing space on the church grounds to erect a cell tower;

- arranging to have additional information disseminated to the membership concerning the potential benefits of partnering with the Shaklee Corporation before taking any final action on this option;

- asking an interested congregant to look into acquiring sales merchandise (logoed T-shirts, mugs, etc.) from Café Press, a vendor that specializes in producing such items for churches and other non-profit organizations.

- approving the preparation and distribution of a UUCSV cookbook, contingent on the establishment of a cover price which virtually ensures the church profits from sales.

- integrating the sale of holiday baskets into the Annual Holiday Bazaar and soliciting from the membership expressions of interest in serving as the coordinator of a local UU’re Home program, a mobile work crew or an airport transportation service.

- referring the proposal to hold weekly or monthly spaghetti dinners to the Social Committee for consideration as it plans future church social events.

Church leaders will face significant financial challenges in the years ahead as UUCSV strives to advance its mission. But, as suggested above, it doesn’t follow that launching additional fundraising activities is the best pathway toward accomplishing the church’s financial goals.

One step that needs to be taken is to revise the church’s outdated policy governing fundraising activities. The Board should direct the Treasurer to prepare draft revisions to the current policy and solicit comments from affected church committees before a final version of the policy is considered and acted upon by the Board.
I. Introduction

The results of the recently completed FY 2011-12 budget campaign underscore the need to diversify revenue streams supporting the programs and activities of the Unitarian Universalist Church of the Shenandoah Valley (UUCSV). An analysis of giving patterns reveals that the campaign fell short of its annual revenue target largely because of the loss of a handful of generous contributors, thus demonstrating the consequences of the church’s heavy reliance on pledge payments to support church operations. At present, the bulk of UUCSV’s income (89%) is derived from membership (pledge) payments and donations (Sunday offerings), with the balance drawn from other fundraising activities, including grocery card and coffee sales, receipts from the annual auction as well as the yard sale, the holiday bazaar and other, less lucrative fund-raising activities.

UUCSV is presently on the cusp of becoming a mid-sized congregation as defined by the Unitarian Universalist Association of Congregations (150 to 250 members). Growth opens up new opportunities but also poses many new challenges, including raising sufficient funds to support the expanded programs and activities of the church. Recognizing that the achievement of the church’s goals and aspirations is tied to a considerable extent to the congregation’s ability to raise additional funds, late last year the UUCSV Board of Directors asked Church Treasurer Bob Gettings to identify potential new revenue sources and analyze the potential costs and benefits associated with each proposed strategy.

In early March, Mr. Gettings brought together a group of concerned members to discuss possible new approaches to generating church revenue. The aim of this initial, brain-storming session was to identify possible ways of securing additional funds to cover church operating expenses. The meeting yielded a variety of suggestions, ranging from expanding rental income, to providing overnight accommodations and household services, to selling additional goods and services through the church. The potential advantages and disadvantages of each approach were discussed by the group and, subsequently, feedback was solicited from members of the congregation regarding the various approaches to raising additional funds.

The purpose of this report is to summarize the findings of the membership survey, suggest several conclusions which might be drawn from these findings, and recommend actions the UUCSV Board might take in an attempt to expand and diversify sources of church revenue.

II. Methodology

A notice was included in the weekly announcements soliciting ideas and expressions of interest in participating in an exploratory meeting to discuss potential new revenues sources. The approximately 12 individuals who responded to the notice were invited to attend a brain-
storming session following the March 6, 2011 Sunday service. Each participant received in advance of the March 6th meeting an e-mail explaining the purposes of the meeting, a working agenda, and a suggested list of criteria to be used in selecting new revenue-generating activities. The proposed criteria included: compatibility with UUCSV’s mission; the efficient use of volunteer and staff resources; the effective deployment of congregational talents and skills; an adequate supply of volunteers; and the capability to sustain the activity over time. Later, at the suggestion of meeting participants, a sixth criterion (activities members would find engaging) was added (see Appendix A for details).

Following the March 7th meeting, Mr. Gettings shared with participants a summary of the ideas which had been discussed. This summary explained the basic approach, the potential advantages and barriers as well as the additional information necessary to determine the feasibility and utility of each approach which had been proposed (see Appendix B). The purpose of this summary was to promote a common understanding of the approaches under consideration, including their potential advantages and disadvantages.

Before deciding which of the dozen or so revenue-raising activities should be pursued, Mr. Gettings felt it was important to obtain feedback from the congregation and, therefore, he prepared a survey questionnaire designed to elicit members’ views on the various approaches which had been proposed (see Appendix C). The survey was organized by type of revenue-raising activity: space rentals; the sale of additional commodities, services for hire and additional church-sponsored special events. Respondents were asked whether they would personally support the particular activity (e.g., would they be likely to purchase additional commodities and services made available) and also whether they would assist in carrying out or managing the particular activity.

In addition to distributing survey questionnaires during the April 24th service, Mr. Gettings also posted the questionnaire online and invited members (via a notice in the weekly church announcements) who wished to do so (or were unable to attend the 4/24 service) to complete and submit their survey responses electronically. A total of 20 completed questionnaires were collected at or following the April 24th Sunday service and an additional 24 responses were received online, bringing the total number of survey responses to 44.

Finally, information concerning the fund-raising experiences of other UU congregations was elicited by posting an inquiry on the UU-Money list serv, a monitored electronic discussion group maintained by UUA for church treasurers, finance committee chairs, and other lay leaders across the nation. Where applicable, the responses to this listserv posting are discussed in the “Findings” section below.
III. Findings

Rental Income. The vast majority of space within the church building is used only sporadically during weekdays and then mainly for evening meetings and activities. To the extent, therefore, that space could be rented out during periods when it is not needed for a church-sponsored activity, additional church funds could be generated. Moreover, in the case of long-term lease arrangements, the amount of staff and volunteer time required to support the leasing agency should be minimal once the lease is negotiated and the renting organization commences operations.

Three potential approaches to earning rental income were explored as part of the survey: (a) renting space to a provider of a child/nursery care center, a senior activity center or a similar long-term renter; (b) renting space for weddings, anniversaries, family reunions, business retreats, etc.; and/or (c) allowing a telecommunications firm to erect a cell tower on church grounds, provided it was located in a remote, unobtrusive area of the property.

Ninety-five percent of the respondents (40 out of 42) indicated they would support renting space to a nursery/child care or senior center, even though church activities on occasions would have to be scheduled around the tenant’s operating hours (see Figure 1).

![Long-Term Space Lease Arrangement](image)

Figure 1

The survey respondents also expressed strong support for renting church space for individual and family events. Ninety-one percent of the respondents (40 out of 44) expressed support for this option (see Figure 2 below). But, relatively few respondents (only 12 out of 43 respondents or 28%) said they were willing to help in marketing church rentals or assist with scheduling and/or managing logistical arrangements for such events (see Figure 3 below).
In addition, a sizeable majority of respondents (80%) indicated that they would support the erection of a cell tower on church property should an interested telecommunications vendor be identified. However, a small, but not insignificant proportion of the respondents indicated they were opposed to renting space to a telecommunications firm. The survey results provide no insights into whether this opposition was based on aesthetic considerations or lingering concerns about the health effects of long-term exposure to microwaves (see Figure 4 below).
Support for Erecting a Cell Tower

Figure 4

Expanded Commodity Sales. At present, the church earns income from the sale of grocery cards, candy and certain other consumer products. The survey sought to gauge congregational support for selling other types of commodities and gift items through the church. More specifically, respondents were asked whether they would support the sale of products distributed by the Shaklee Corporation, a distributor of eco-friendly, natural home care, personal care and nutritional products. They also were asked about their interest in purchasing – and supporting the production and marketing – of other consumer products – i.e., a church cookbook, Christmas gift baskets, T-shirts, baseball caps, etc.

A majority of the 44 survey respondents (58.5%) were opposed to partnering with the Shaklee Corp. to sell corporate products (see Figure 5 below). Some opponents said they did not believe that the church should actively promote the sale of commercial products (although one opponent conceded that the same objection could be raised with regard to the sale of grocery cards). Other respondents sought assurance that Shaklee products were truly “eco-friendly,” with one person stating the church should not enter into an agreement with the corporation unless the products were certified eco-friendly by an independent entity.
A majority of respondents supported the sale of a UUCSV cookbook, Christmas gift baskets, and logo T-shirts and baseball caps. Support was marginally stronger for the sale of cookbooks (65%), followed by Christmas goodie baskets (57.1%) and logo T-shirts and baseball caps (52.4%). A majority of respondents also indicated that they would be willing to assist in producing and selling these products – 52.4 percent of respondents in the case of cookbook preparation and sales, 57.1 percent in selling logo T-shirts and baseball caps and 64.3 percent in selling Christmas baskets.

Service Activities. In addition, the survey questionnaire explored the respondents’ interest in sponsoring several types of revenue-generating service activities, including the provision of accommodations for overnight guests, the performance of household tasks, and furnishing rides to and from local airports. In each case, the services would be furnished by church volunteers, with the compensation directed to the church.

Only a little over one-third of 41 respondents (15 out of 41) indicated that they would be willing and able to accommodate out-of-town guests in their homes if the church were to organize a local UU’re Home program (see Figure 6), a web-based matching service which helps travelling UUs find overnight accommodation with fellow UUs. Many UU congregations across the nation already participate in this long-established program.
Even fewer respondents expressed a willingness to help coordinate a local UU’re Home program (e.g., lining up church members who are willing to accommodate visitors on the requested dates; confirming arrangements; and transacting payments). Only 7 out of 41 respondents said they would be willing to help coordinate a local program (see Figure 7).

Only slightly over a quarter of the survey respondents (11 out of 40 respondents, or 27%) said they would be willing to serve on a work crew performing straight-forward household task in return for the church receiving payments for such services. The number of respondents willing and able to transport interested individuals between their home and Dulles and/or BWI airports was even lower (7 out of 41 respondents, or 17%). The number of respondents indicating they would be likely to use such an airport transit service was also very low (8 out of 42 respondents, or 19%).

Other Events. Finally, survey respondents were asked whether they (and, possibly, other family members) would attend regular weekly or monthly spaghetti dinners should the church
organize and hold such dinners. Slightly less than half of the respondents indicated that they would be willing to participate in such dinners (19 out of 40, or 48%) (see Figure 8).

Participation in Spaghetti Dinners

![Figure 8](image)

On a more positive note, half the respondents to the survey indicated they would be willing to help organize and conduct the weekly spaghetti dinners if they were to be held.

IV. Conclusions

None of the proposed fundraising approaches are self-executing – i.e., volunteers would be required, to one extent or another, to organize and carry out any of the proposed fundraising initiatives. Because the time and energy of church volunteers is finite, one must attempt to determine the comparative amount of time, effort and expertise involved in setting up each fund-raising initiative and maintaining it over time. In raising funds, volunteer resources need to be used judiciously or the church’s capacity to pursue other important components of its mission could be seriously compromised. Indeed, the chronic problems which UUCSV currently faces in recruiting committee members and filling key leadership posts suggests that a careful assessment of the overall deployment of volunteers should be completed before any decisions are made regarding new fund-raising initiatives.

Obviously it is important to assess the revenue potential of any proposed fundraising alternative. Yet, due to the imponderables involved, it is impossible to predict, with any degree of accuracy, the amount of funds which may be secured through any new fundraising initiative without actually initiating the program. Plus, during the evaluation and selection process, there is a tendency to confuse revenue-raising potential with expanded opportunities for social interaction. While the focus here is on generating revenue, fostering a sense of community within the congregation also is a critical goal. Trying to achieve both objectives through a single activity runs the risk of achieving neither. Clarifying the church’s primary objective, therefore,
should be treated as a critical component of selecting and organizing new church fundraising activities.

**Rental Income**

**Leasing Space.** The merits of leasing space are offset by the uncertainty of locating a suitable tenant. Preliminary efforts to find a social service agency interested in leasing space from UUCSV have been unsuccessful to date. It is possible of course that a more systematic search might uncover an agency which is in the market for new quarters. But, the semi-rural location of the church and the number of child care programs already operating in Stephens City argue against this possibility. In addition, the lessee may have expectations (e.g., dedicated storage space; outdoor playground equipment) that would involve costly renovations which would be either “deal killers” or, at best, offsets against future lease payments. There also might be hidden costs. For example, the church may have to designate a staff member or volunteer who is available on weekdays to deal with lighting, plumbing, heating, air conditioning and other malfunctions or emergencies. In addition, staff members – especially the Church Administrator who spends the most time in the building– may be called upon to answer questions and deal with requests while on-site, thus diverting time from her/his regular duties.

**Serving as a Venue for Special Events.** For a number of years, UUCSV has rented the building (or portions thereof) for special events such as weddings, anniversary celebrations, business retreats, etc. The revenue from such rentals has been modest in recent years (averaging a little under $1,500 a year over the past three fiscal years). On several occasions, UUCSV leaders have discussed the possibility of mounting a sustained marketing campaign, with the aim of expanding rental income; but, these nascent plans never reached fruition, due mainly to the failure to find an individual(s) willing to assume responsibility for coordinating the program. The prospect of increased special event rentals was raised once again during the March 6th brainstorming session.

The church sanctuary, unquestionably, is an attractive venue for weddings and other celebrations. And, with a more systematic promotional campaign, the church could be the site of more revenue-generating events. The prospects of generating additional revenue from special events are slim to non-existent, however, unless church leaders are able to either: (a) expand the work hours of the Church Administrator or hire an additional part-time employee to spearhead event marketing, planning and coordinating; or (b) recruit a volunteer from within the congregation to take on these duties. The person selected to coordinate the space rental program would have to spend a considerable amount of time “getting the word out” through press releases, advertisements in the local media, and by attending conventions of wedding/event planners, etc. Steps also would need to be taken to ensure onsite coordination of events sponsored by outside individuals and organizations. In other words, mounting an
effective program would involve a considerable degree of work. The results of the membership survey suggest that finding a volunteer to assume these duties won’t be easy. Only 12 of 43 respondents indicated that they would be willing to help in organizing and carrying out an expanded building rental program.

**Cell Tower Lease.** The erection of a cell tower under a lease agreement with a telecommunication firm potentially could yield a reliable, ongoing source of church revenue. In addition, the resulting lease payments would be entirely passive, since the telecommunication company presumably would assume all responsibility for constructing and maintaining the tower. Of course, we don’t know if it will be possible to locate a communication firm interested in erecting a cell tower in the Stephens City area. Until such a firm can be identified, this option, like the possibility of renting interior space to a local social services agency, cannot reach fruition despite majority support within the congregation.

**Sale of Additional Commodities**

**Shaklee Products.** Rebates from the sale of Shaklee products are attractive (between 8% and 34% of total sales depending on the participation level). And the corporation would absorb virtually all of the setup and ongoing administrative costs of operating the program. All transactions would occur between the buyer and the corporation through a secure website. As a result, the church would not have to organize a sales force, incur upfront inventory maintenance costs, pay unrelated business taxes, or have any involvement in product distribution. Rebate payments would be deposited automatically in the church’s bank account on a monthly basis.

The amount of revenue received by the church would depend entirely on the volume of online sales to UUCSV members and friends. While illustrative examples on the Shaklee website highlight the substantial earnings potential, UUCSV’s existing arrangement with Amazon.com has generated very little revenue for the church (never exceeding $400 during any fiscal year). This suggests that church leaders would have to actively promote online purchases of Shaklee products, a step which might be resented by some members of the congregation. Furthermore, given the fact that a majority of the survey respondents (58.5%) were opposed to partnering with the Shaklee Corporation, any decision to enter into such a partnership should be proceeded by an organized effort to allay membership concerns.

**Sale of Logo Paraphernalia.** A slim majority of respondent to the membership survey expressed support for selling T-shirts, baseball caps, coffee cups and other logoed items. A slightly larger majority of respondents indicated they would be willing to help sell such items. The amount of revenue which might be obtained through the sale of such items is uncertain; but potential purchasers would be limited almost entirely to UUCSV members and friends, and the possibility
of repeat sales would be low. As a result, the sale of such items is unlikely to be a significant, sustained source of church revenue. Indeed, the primary aim of selling logoed items appears to be to promote group identity (pride), with raising funds for the church a secondary objective.

Production and Sale of a Church Cookbook. This proposal shares some of the same limitations as the sale of logoed items – questionable revenue-generating potential and a low probability of repeat sales. However, almost two-thirds (65.1%) of respondents to the membership survey said they would be likely to purchase a UUCSV cookbook were it to be published, and over half the respondents indicated they would willing to assist in the preparation, distribution and sale of the cookbook. In summary, there appears to be reasonably strong support within the congregation for preparing and issuing a church cookbook.

Sale of Holiday Baskets. Despite majority support for this option in the membership survey, the net amount of sales revenue is likely to be modest. And, it seems reasonable to ask why such sales should be planned separately, rather than in concert with, the Annual Holiday Bazaar – even if planners should decide to sell gift baskets during several Sundays leading up to Christmas (rather than at the bazaar only).

Services

None of the three service options explored during the membership survey drew strong support within the congregation.

UU’re Home Program. Relatively few survey respondents indicated that they would be willing to accommodate out-of-town guests in their homes as part of an organized program to raise funds for the church. The number of individuals willing to help manage a local affiliate of the UU’re Home program was even smaller. Furthermore, unless a volunteer program coordinator can be identified, who is willing to recruit participating homeowners and perform, with the assistance of other volunteers, the myriad of tasks involved in operating a successful program, this option would appear to be a non-starter.

Household Services. Few survey respondents told us they would be willing to serve on a volunteer work crew responsible for performing household tasks in return for payments to the church. An active, committed program coordinator – someone willing to market the program, line up volunteers, schedule work assignments and perform a myriad of related tasks – would be essential to the success of the program. And, thus far, no one has indicated an interest in performing this key role.

Airport Transit Services. Very few survey respondents said they would be willing to drive passengers to and from local airports in return for donations to the church. Furthermore, few respondents indicated they would be likely to take advantage of this service on a frequent or
semi-frequent basis (8 out of 42 respondents). Given the limited pool of volunteer drivers and the lack of widespread interest in using such a transit service, the viability of this fundraising approach appears questionable at best.

**Other Fundraising Events**

Slightly less than half of the survey respondents reported that they were likely to attend weekly or monthly spaghetti dinners sponsored by the church. And, approximately the same percentage indicated a willingness to help plan and carry out such dinners.

It seems questionable, however, that these dinners would generate a significant amount of income for the church. If the aim was to attract a wide range of members of the congregation, including families with school-aged children, the suggested donation level would have to be low, which, of course, means average attendance would have to be reasonably high simply to cover basic operation costs such as the purchase of ingredients and beverages. In addition, given the plethora of other social and cultural events sponsored by the church, the potential for scheduling conflicts and “attendance fatigue” is likely to be high. For example, the Social Committee already has proposed an event–a-month calendar of church social events for FY 2011-12—many of them staples of the annual church calendar; plus, the Concert Committee intends to sponsor at least four evenings of music and dance during the upcoming fiscal year.

**Recommendations**

None of the proposed alternatives discussed in this report appear to be “slam-dunk” solutions to the funding problems facing UUCSV. There is no firm basis for concluding that many of the proposed revenue generating activities (spaghetti suppers; expanded commodity sales, airport transportation fees, etc.) would yield a significant amount of revenue for the church. And, while it can be argued that “every little bit helps,” there is also the possibility that receipts from new revenue-generating activities will lead to reduced income from existing revenue sources (e.g., grocery card, coffee and candy sales) and attendance at established fund-raising events (e.g., the holiday bazaar; the August yard sale and community concerts). After all, the target audience (UUCSV members and friends) is essentially the same in all cases and there are limits on the amount congregants are able to spend.

The few approaches with significant revenue raising potential have other impediments to implementation. Either church leaders have been unable to find a willing partner (as in the case of renting building space or erecting a cell tower) or a volunteer has not been identified to organize and carry out the proposed fund-raising activity. In both cases, there is little reason to proceed unless and until these impediments are removed.
In reviewing the merits of new fundraising initiatives, the UUCSV Board of Directors should adopt a broad approach to addressing the current and future financial needs of the church. In particular, the Board’s inquiry should encompass the possibility of investing the time and resources it would take to launch a new fundraising initiative in improving the effectiveness of existing fundraising activities. For example, if church leaders were able to:

- increase the number of members who make annual financial commitments (pledges) by ten (10), total church revenue would increase by approximately $11,000 a year.¹ According to a statistical analysis completed by the Annual Budget Campaign Committee, the proposed increase would represent about one-third of members (including partners in multi-pledge units) who have made no FY 2011-12 financial commitments to the church.

- return Sunday services collections to the level achieved in FY 2009-10, an additional $11,000 in church revenue would be available.

- Raise grocery cards sales by ten (10) percent above the FY 2009-10 level, church revenue would increase by approximately $1,500 a year.

All of the above objectives are achievable. However, considerable time and energy would be required to accomplish these objectives. For example, to increase the proportion of members who make annual financial commitments (pledges) to UUCSV, it would be necessary to develop a viable membership retention program, launch a year-round stewardship program and better target activities during the next annual budget campaign. Similarly, a concentrated effort to encourage congregational participation would be needed to increase Sunday service collections and/or raise grocery card sales. **The key question the Board must answer is: which of the following approaches is likely to have the greatest impact on increasing church revenues and stabilizing UUCSV’s finances over the long haul: (a) improving the effectiveness of existing fundraising activities or (b) launching new, promising fundraising initiatives.** The Board’s decision is likely to have a far-reaching effect on the manner in which the finite human and fiscal resources of the church are deployed in coming years.

Regardless of the course the Board elects to pursue, there are a series of steps concerning the new fundraising approaches identified during the present study which the Board should consider. These steps include:

¹ The $11,000 figure is based on the average per member pledge level in FY 2011-12, as reported by the Annual Budget Campaign Committee.
• **Delegate to the Building Committee responsibility for continuing the search for organizations interested in renting space in church building.** Among the specific responsibilities which should be assigned to the committee are: (a) reviewing and updating existing building rental policies to ensure that they are clear and comprehensive, both with respect to special event rentals as well as long-term space rental agreements; (b) analyzing current market rates for rental space within the nearby area and proposing any adjustments in current building rental rates; (c) identifying a volunteer(s) who is willing and able to coordinate space rentals, including continuing the search for a social services agency interested in entering into a long-term space rental agreement with the church and marketing and coordinating special events rentals; and (d) preparing and distributing an updated church rental brochure. In addition, should an interested social services agency be found, the Building Committee should be assigned responsibility for negotiating the terms of the lease agreement and presenting its recommendations to the Board.

• **Delegate to the Grounds Committee responsibility for seeking out a telecommunication firm interested in leasing space on the church grounds to erect a cell tower.** In the event that an interested firm is identified, the committee should be responsible for briefing interested members of the congregations on the most recent scientific findings regarding possible health risks associated with microwaves emanating from cell towers before any agreement to erect a cell tower is reached. The committee also should be responsible for negotiating the terms of the lease agreement, including the exact location where the cell tower is to be erected and sharing its recommendations with the Board.

• **Share with the membership additional information concerning the potential benefits of participating in the Shaklee Corporation non-profit partners program, should the Board be interested in exploring this option in greater depth.** Such information can be accessed through the Shaklee website. In addition, Jane Laura Doyle, a long-time, satisfied user of Shaklee products, has volunteered to organize a video presentation on the benefits of participating in Shaklee’s non-profit partner program.

• **Ask an interested member to investigate acquiring sales merchandise through Café Press, if the Board is interested in exploring further the possibility of selling logo T-shirts, coffee mugs and possibly other paraphernalia.** Net profits from the sale of logo T-shirts, coffee mugs, etc. are not likely to yield significant income for the church once the cost of purchasing and maintaining a stock of merchandise is taken into account. But, if this options is to be pursued, the use of a vendor such as Café Press, one of the
nation’s largest distributor of logo coffee mugs, T-shirts, bumper stickers, etc., would offer a number of advantages. First, all merchandise is produced on a just-in-time basis which eliminates the need for front end investments, inventory maintenance and administrative costs. All the church needs to do is provide the supplier with the logo/phrasing to be used and encourage members and friends to place their orders online. The church receives rebate payments on all sales while also helping to promote community awareness as members wear their T-shirts or drink from their coffee mugs. A number of UU churches use Café Press (cafepress.com) as their vendor and this approach was recommended in a recent UUA online blog.

- **Approve the preparation and distribution of a UUCSV cookbook, contingent on the submission of pre-publication estimates of printing costs and a cover price which virtually ensures that the church will receive income from this venture.** While net revenues from the sale of a UUCSV cookbook are likely to be modest, the membership survey results suggest that a significant number of congregants are likely to purchase copies. Importantly, Barbara Peters has agreed to coordinate the preparation and sale of the cookbook and already has identified a number of members and friends who are willing to submit recipes and otherwise help with production and distribution tasks.

- **Integrate the sale of Christmas goodie baskets into the Annual Holiday Bazaar, rather than treating such sales as a free-standing fundraising activity.**

The results of the membership survey suggest weak congregational support for all three service-related approaches to generating additional church revenue. The key to mounting a successful program in all three cases is to find a volunteer who is willing and able to organize and coordinate the proposed activities. Unless a qualified volunteer is found, further action on these revenue-raising strategies should be deferred. **If, however, the Board wishes to pursue any of the three identified alternatives further, it should solicit expressions of interest from members of the congregation in serving as the coordinator of a local UU’re Home program, a mobile work crew or an airport transportation service.** Individuals who volunteer to fill these posts should be asked to prepare and submit a “business plan” spelling out the tasks involved in mounting such a program and explaining how these tasks will be accomplished. A final decision on whether to proceed will rest with the Board in each case.

The Board also should refer the proposal to hold weekly or monthly spaghetti dinners to the Social Committee for consideration as it plans future social events. There is no evidence that such suppers would generate any significant amount of revenue for the church. Moreover, the Social Committee is in the best position to decide whether such suppers would be a more
effective way of promoting inter-congregational social ties than existing or newly proposed events on the church calendar.

Summary Observations

In a recent online blog dealing with church fundraisers, Dr. Wayne Clark, UUA’s director of Congregational Stewardship Services, offered the following observation by a lay congregational leader:²

We used to have a lot of fundraisers to help balance the budget. Most notably, we ran a fall at-your-service auction and a spring yard sale. After a while, people got worn out from all the hard work and excruciating pressure of needing to raise a certain amount of money each time. It got harder and harder to recruit volunteers to run these events.

Then, someone had an epiphany: “Not only is this really hard work, but, for the most part, we are just exchanging money among ourselves.” And then someone estimated the amount of time required to run each fundraiser. It was easy to see that conducting fundraisers to balance an operating budget was not all that cost effective.

“We fundraisers to build community,” Dr. Clark concludes, “are great. Fundraisers to support external ministries are also great. Using fundraisers to balance an operating budget … not so much.” He suggests that a congregation strive to raise the bulk of its operating revenues – between 75% and 85% of the total -- through membership commitments (pledges) secured during the annual budget campaign.

During FY 2011-12, UUCSV expects to receive 80.2 percent of its operating revenue from pledge payments – or just about the mid-point of the range suggested by Dr. Clark. Clearly, church leaders will face significant financial challenges in the years ahead as we strive to advance UUCSV’s broad mission. But, as suggested above, it doesn’t necessarily follow that launching additional fundraising activities is the best pathway toward accomplishing the church’s financial goals.

Dr. Clark suggests that UU congregations adopt fundraising guidelines and offers the following starter list of points to be covered in such guidelines:³

- No fundraisers may be scheduled during the annual budget drive;
- All fundraisers must be approved, in writing, by the governing body or some other delegated group;
- There is one, and only one, calendar of fundraising events;

² “All we ever do is talk about money!,” an online blog by Dr. Wayne Clark, posted on the UUA website, December 13, 2010.
³ Ibid.
• All fundraising events must have a designated chair;
• All events must keep a written account of income and expenses; and
• All income must be submitted to the treasurer (or some other delegate) for safekeeping.

UUCSV’s current policy on fundraising activities was adopted in March 2005 and subsequently revised in October of the same year (see Appendix D). At this point the policy is outdated and should be revised. The Board should direct the Treasurer to prepare draft revisions to the current policy and solicit comments from affected church committees before a final version of the policy is considered and acted upon by the Board.
Appendices
Appendix A

Evaluation Criteria
Revenue-Generating Methods

UUCSV already sponsors a variety of fund-raising activities (grocery card and coffee sales; the annual auction; the holiday bazaar; yard sales; etc.) and, consequently, there are practical constrains on the number of new activities which can be launched without experiencing volunteer (and congregational) burn out. With this thought in mind, it will be important to develop criteria to evaluate new fund-raising proposals. The following is a starter list of possible criteria that might be used.

1. **Compatibility with the Mission of the Church.** No fund-raising activity should be undertaken that is inconsistent with the mission of the church and the values it espouses. Regardless of the nature of the fund-raising activity, the goal should be to cast the church in a positive light.

2. **Efficient Use of Church Resources.** Priority should be assigned to fund-raising activities which employ the fiscal and human resources of the church efficiently. In other words, the goal should be to raise the maximum amount of revenue with the minimum investment of financial and human resources. In this regard, it is important to keep in mind that labor intensive fund-raising activities which yield modest amounts of revenue consume a disproportionate amount of volunteer and staff time that could be deployed in other, more profitable pursuits. If Activity A is likely to require at total of 200 hours of volunteer time to organize and conduct in order to obtain $1,000 in net revenues for the church and Activity B is likely to involve a total of 100 hours of volunteer time to yield $5,000 in net revenue, then preference should be given to the latter activity.

3. **Effective Deployment of Congregational Talents and Skills.** Some fund-raising activities are difficult to initiate unless there is a core group of volunteers with well-honed skills related to the planned activity (e.g., sewing a quilt or building a swing set that will be sold at auction). In evaluating possible fund-raising activities, therefore, it is important to ascertain whether: (a) the requisite skills exist within the UUCSV congregation; and (b) the individuals possessing those skills are willing to devote their time and energy to organizing and carrying out the activity.

4. **A Sufficient Supply of “Foot Soldiers.”** Some fund-raising events require not only talented leaders but also an ample number of individuals willing to perform assigned tasks prior to, during and following the event. In such cases, it is important to assess whether enough volunteers can be recruited to ensure the success of the event.

5. **Capability of Sustaining the Fund-Raising Activity Over Time.** In many instances, we won't be able to assess the feasibility of an approach to raising additional funds until we “give it try.” Nonetheless, we should consider the potential sustainability of the proposed approach and give preference to activities with the potential for replication, month after month or year after year.
6. **Engaging Developmental Activities.** Other considerations being equal, preference should be given to activities which are fun to carry out and build connections and camaraderie among participating members of the congregation.
Review of Revenue-Generating Activities Discussed during March 6th Brainstorming Session

Expanding & Improving Existing Revenue Raising Activities

Improved Organization & Promotion

A. Develop a Event Organization Checklist

1. Basic Concept: An easy-to-follow checklist for completing event arrangements would improve the efficiency of set-up and disassembly activities while minimizing the number of oversights and glitches in the process. It would be particularly helpful to first-time event coordinators and volunteers who otherwise may find it difficult to locate stored equipment and supplies.

2. Potential Advantages: A standardized checklist should reduce the time and effort involved in setting up for church sponsored events and disassembling afterwards. It would be particularly helpful to first-time event coordinators and volunteers and might even reduce to some extent the number of volunteers required to complete such activities.

3. Potential Barriers: Because each event requires its own unique arrangements, it may be difficult to standardize the set-up and disassembly process beyond a certain point.

4. Next Steps: Mary Haskins and Miki Leeper have agreed to prepare an event organization checklist and circulate a draft for comments.

B. Improve Congregational Awareness of Sale Commodities.

1. Basic Concept: Providing periodic reminders to the congregation of the products available for sale through a variety of media.
2. **Potential Advantages**: Consistent reminders in the Weekly Announcements, on the website, during church services, and, possibly through improved displays in the Narthex, would help to maximize revenue from grocery card, coffee and other commodity sales.

3. **Potential Barriers**: As yet, no member of the congregation has agreed to be responsible for developing and coordinating an enhanced commodity promotion plan. In addition, the current policy on Sunday service announcements limits opportunities to encourage members to purchase grocery cards, coffee and candy.

4. **Next Steps**: Bob Gettings should meet with Margaret Schad, Mary Dale Jackson and Barbara Peters to explore possible ways of developing an enhanced promotional program.

C. **Develop a Plan for Marketing Church-Sponsored Fundraising Events**.

1. **Basic Concept**: Create a unified plan for marketing church-sponsored fundraising events. Responsibility for carrying the plan would be assigned to a single entity within the church.

2. **Potential Advantages**: A unified marketing plan, which includes timely and consistent feeds to local media outlets and posting appropriate announcements on the church’s website and elsewhere, could significantly broaden participation in church-sponsored fundraisers beyond members of the congregation and increase the total revenue generated from such events. It would also relieve planners of specific events of a responsibility which often they are ill-equipped to undertake.

3. **Potential Barriers**: The Communications Committee is the logical locus of responsibility for preparing and executing such a plan, but at the moment the committee may lack the capacity to take on this responsibility.

4. **Next Steps**: Bob Gettings will discuss possible approaches to preparing a church-wide event marketing plan with Dave Miller, chair of the Communications Committee.

**Event-Specific Improvements/Enhancements**
A. **Yard Sale Enhancements**

1. **Basic Concept**: The church could build on the success of the August 2010 Yard Sale by: (a) developing a better organized approach to picking up sale items from congregants who are unable to transport their items to the church; (b) advertising the availability of bathroom facilities (and possibly renting a couple of port-a-johns for the event); (c) expanding food sales during the event.

2. **Potential Advantages**: Holding the 2010 event in conjunction with the Route 11 Crawl proved to be a big success. The availability of bathroom facilities turned out to be a significant incentive for shoppers to visit the church’s sale. It should be possible to expand sales revenue in 2011 by offering a wider range of sales items, food and drinks.

3. **Potential Barriers**: The 2011 Yard Sale Committee (Joe Schad and Zelda Zadnik) will need to find a volunteer willing to coordinate the pick-up process and a volunteer to organizing food preparation and sales.

4. **Next Steps**: Pass on suggestions to Joe and Zelda and support their efforts to plan and carryout the 2011 Yard Sale.

B. **Direct Bulk Coffee Orders**

1. **Basic Concept**: Promote the bulk sale (six, 12 oz. bags) of coffee to interested members of the congregation.

2. **Potential Advantages**: The option of having a 6 bag box of coffee shipped directly to your home is currently available, but has never been promoted adequately and, therefore, is used by very few members of the congregation. Bulk orders could be handled by the coffee sales crew without adding significantly to the workload and this option might boost total coffee sales to some extent. The shipping cost on such orders is modest (about 60 cents per bag), a cost that interested congregants probably would view as more than offset by the convenience of door-to-door delivery. Congregants also would be able to select among the full range of blends offered by the vendor, rather than buying the most popular blends which the church maintains in its inventory.
3. **Potential Barriers:** Bulk orders might add to the workload of the Church Administrator since she would have to call in orders individually, rather than ordering coffee only when the in-stock inventory is depleted. [N.B., Laurie doesn’t see this as significant problem, but also doubt that promoting bulk orders will add significantly to total coffee sales.]

4. **Next Steps:** Joe Maio has prepared a bulk order form and will work with the Barbara Peters and Mary Dale Jackson to initiate such sales, including the preparation of an item re-announcing this option for inclusion in a forthcoming issue of the weekly announcements.

C. **Expand Community Concert Series**

1. **Basic Concept:** The principal objective of the Community Concert series to date has been to offer members of the congregations a fun musical event and an opportunity to socialize several times a year. As long as income covered costs (primarily performance fees), everyone has been satisfied. But, with a little additional effort – more frequent and varied concerts and enhanced promotional efforts – it may be possible to generate additional revenue from the concert series.

2. **Potential Advantages:** Assuming more effective marketing, these concerts could generate additional revenue and also be a positive way of introducing members of the community to the church. And, as the word has gotten around, it has become increasingly easy to recruit performers at a reasonable cost.

3. **Potential Barriers:** As noted above, we don’t have an effective strategy for marketing the concerts as well as other church-sponsored events. Nor have we identified an individual or body within the church who is willing to undertake the task of developing and executing such a marketing plan. Furthermore, there is little evidence that we could attract a large enough number of non-members to generate a significant amount of additional revenue. And, increasing the amount of the suggested donation is likely to deter participation by members and non-members alike.

4. **Next Steps:** A financial feasibility study is needed to make a case for the financial viability of an expanded concert series. But, thus far, no one has volunteered to
undertake such an analysis. Meanwhile, Sandy Lore has a list of local media outlets which can be used to “get the word out” about upcoming concerts.

D. Add Family-Oriented Activities at the Annual Auction

1. Basic Concept: The addition of family-oriented activities (children’s games, movies, etc.) – including child care – may draw more families with young children to the annual auction which, in turn, could generate more competitive bidding and higher auction revenue.

2. Potential Advantages: Expanding the base of bidders at the auction is the key to generating additional revenue from the event. The net proceeds from the auction has stagnated in recent years (and is lower than it was 3-4 years ago), primarily because only a minority of members participate in the event and an even smaller number actively engage in the bidding.

3. Potential Barriers: The basic premise -- that higher attendance (especially by families with young children) would lead to enhance revenue – is untested. It, therefore, is unclear whether the additional time and expense involved in planning and carrying out child-oriented activities (plus the additional child care expenses) would result in higher net revenue from this event. There also is the question of who within the church would be responsible for organizing special activities for children and families (e.g., the Auction Committee; the RE Committee?) and whether such activities would enhance or detract from the major aim of the event.

4. Next Steps: Bob Gettings should share the notion of planning more family-oriented auction activities with the co-chairs of this year’s Auction Committee, Bob Haskins and Dick Dugan.

Space Rental Opportunities

A. Lease Space to a Child/Nursery Care Operator
1. **Basic Concept:** A long-term lease agreement with a local provider of child/nurse care services would yield income with potentially a minimum of ongoing church expenditures.

2. **Potential Advantages:** An arrangement of this type could result in a significant, reliable source of income for the church on an ongoing basis.

**Potential Barriers:** First, two child care centers are currently in operations in Stephens City and it is not clear that there is a demand for additional child/nursery care space at the current time. Second, having a separate business operated on the church premises could substantially increase liability insurance costs. Third, the facility would have to be licensed by the state as a child care facility which might involve potentially expensive renovations to meet code requirements. Fourth, space to conduct other church-related activities (committee meetings; LFD classes; etc.) would be more confined because of the time which would have to be reserved for nursery/child care operations. And, finally, there may be hidden costs, such as the cost of having a church representative on the premises or on-call during center operating hours.

3. **Next Steps:** Follow-up with Robert Hurt who has promised to arrange to have a state inspector walk thought the building and point out any potential child care facility code violations which would have to be addressed (Bob Gettings). Check with the church’s insurance agent to obtain an estimate of any additional liability insurance costs that are likely to be incurred (Bob Gettings). Identify any local day/nursery care operators in the area that may be interested in leasing space (Katie Mack).

**B. Reorganize the Special Events Rental Program**

1. **Basic Concept:** For a number of years, UUCSV has rented the church facilities for special events, such as weddings, anniversaries and other gatherings; but, the program has been managed episodically at best and has never yielded a substantial amount of income.

2. **Potential Advantages:** A better-organized rental program, arguably, would attract new customers, resulting in a substantial increase in the amount of rental income the church receives annually.
3. **Potential Barriers**: The promotional and logistical work involved in managing a well-run facility rental program would be considerable. It is not a task we could expect the Church Administrator to take on as an additional duty and, yet having a single referral point is a key running a successful program. At the moment, no one within the church family with the requisite skills and experience has agreed to take on this task. In addition, maintaining an active facility rental program could exacerbate the existing problem of finding appropriate time slots for all of the activities currently underway within the church.

4. **Next Steps**: Review the proposal developed by Holly Hewitt last year and determine whether there is anyone within the church family who would be able and willing to coordinate an active facility rental program.

**C. Lease Space for a Cell Tower**

1. **Basic Concept**: Line up a local telecommunications firm which is interested in renting space to erect a cell tower.

2. **Potential Advantages**: As other churches (and private property owners) have discovered, leasing land to erect a cell tower can yield a steady, reliable source of income without investing any time or money. Moreover, the church property is large enough that it should be possible to situate a tower in location outside the immediate sight range of the church.

3. **Potential Barriers**: Most telecommunication firms in the area presumably have “built out” their cell tower networks and are no longer looking for potential sites. Furthermore, even though the new designs are less aesthetically objectionable, some members of the congregation may be opposed to locating a cell tower on the church grounds.

4. **Next Steps**: Joe Maio has a list of telecommunication contacts in the area and will share it with anyone who is willing to determine whether there is a firm looking to site a cell tower in the Stephens City area.

**New Commodity Sale Items**

A. **Promote Sales of Shaklee Health, Nutrition, Personal & Home Care Products**
1. **Basic Concept**: Promote the sale of items produced by the Shaklee Corp., a nationwide provider of natural nutritional, personal care, and environmentally friendly home care products, thereby earning financial rebates for the church.

2. **Potential Advantages**: By joining Shaklee’s non-profit program and promoting sales of the corporation’s over 300 products, the church would qualify for bonus payments equal to 35 percent of the value of the products purchased by members of the congregation. The church would not have to maintain an inventory of saleable items. Members of the congregation would purchase products directly from Shaklee. The corporation would cover all back office costs and remit monthly bonus checks to the church in an amount equal to 35% of the total price of products purchased by members of the congregation. UUCSV would incur no operating costs as a result of its participation in the program. For example, according to information posted on Shaklee’s website, if 25 families were to purchase an average of $100 worth of products a month through a secure website (using the church’s account number), UUCSV would receive a $500 bonus payment per month, or a total of $6,000 for the year. The producer of one of the first biodegradable cleaning products, Shaklee takes considerable pride in selling environmentally-friendly products. As such participation in the corporation’s non-profit program would be consistent with the goal of creating a Green Sanctuary Program at UUCSV. [for a slide presentation on the Shaklee non-profit program visit: [http://www.betterhealthin31days.com/gallarano/Non-profit](http://www.betterhealthin31days.com/gallarano/Non-profit)]

3. **Potential Barriers**: Some members of the congregation may feel that participation in the program would be inconsistent with the mission of the church. Others may object to being solicited by the church to purchase commercial products.

4. **Next Steps**: Jane Laura Doyle has volunteered to arrange a presentation regarding the Shaklee non-profit program if there is interest in pursuing this option.

**Service Activities**

A. Organize a Church Work Crew to Perform Simple Household/Yard Care Chores
1. **Basic Concept**: Organize a group of church volunteers who are willing to devote a small portion of their time to performing simple household chores for pay, with payments deposited in the church operating funds.

2. **Potential Advantages**: There are a large number of persons living in the upper Shenandoah Valley – both members and non-members of the church – who are unwilling or unable to perform essential household tasks and, therefore, are interested in hiring reliable, trustworthy persons to carry out such tasks. Home owners would be asked to make checks payable to UUCSV rather than to the volunteers involved. Assuming there were enough members of the church willing to spend a small amount of their time each month performing such tasks, the church potentially could receive a considerable amount of income from this source.

3. **Potential Barriers**: It is not clear at this point that there would be enough volunteers to justify organizing such a program. Furthermore, a good deal of administrative and logistical work would be involved in organizing and scheduling the work crews and ensuring that the work was completed to the homeowner’s satisfaction. Thus far, no one has volunteered to assume responsibility for organizing such a program.

4. **Next Steps**: Determine whether there is sufficient interest within the congregation to organize such a program (Bob Gettings).

B. **Organize a UU’re Home Program**

1. **Basic Concept**: For a number of years, UUA has sanctioned a separately-operated program where members of UU congregations open their homes to UUs visiting from out-of-town. Travelers interested in participating in the program must pay an annual membership fee in order to be linked to participating churches across the nation. [N.B., to learn more, visit the UU’re Home website at: http://www.uurehome.com/] Some churches simply serve as a link to the UU’re Home program, but arrangements are made and financial transactions completed by the homeowner and the visitor through the UU’re Home website. In other cases, however, members of the church volunteer to open their home to out-of-town visitors, with the local church acting as the middleman in locating suitable overnight accommodations for out-of-town visitors who participate in the UU’re Home program.
2. **Potential Advantages**: Such a program could be a lucrative source of income if the church were able to organize a program in which payments for overnight stays were remitted to UUCSV. The upper Shenandoah Valley may not be a major hub of tourism but it does attract a steady stream of visitors, especially during the fall and the Apple Blossom Festival.

3. **Potential Barriers**: It is not clear at this point that a sufficient number of congregants would be willing to participate in the program and have the proceeds of overnight fees turned over to the church. And, it would take a significant amount of time to organize and carry out the program since the church would have to be able to arrange suitable accommodations for individuals/couples referred through the UU’re Home program.

4. **Next Steps**: The Williamsburg UU Church has operated a UU’re Home program for a number of years. Mark Lore has agreed to contact leaders in the Williamsburg congregation to “get a read” on their experience with the UU’re Home program and its potential applicability in the catchment area served by UUCSV. Should Mark conclude that this option is worthy of further exploration, we still would have to determine whether: (a) there is a sufficient number of congregants who are willing to open their home to out-of-town visitors; and (b) someone within the congregation who is willing to organize such a program.

C. **Sponsor a Skill Building After School Program**

1. **Basic Concept**: Establish an after-school program where children of working parents could be cared for in an enriched, skill-building environment.

2. **Potential Advantages**: Given the growing number of two-earner families, there is a need in the greater Winchester area for more high quality after-school programs.

3. **Potential Barriers**: The location of the church makes it a less than ideal site for such a program. Furthermore, the establishment of such a program would involve a considerable amount of work and, in all likelihood, a potentially significant upfront investment of time and money. Plus, thus far no one within the congregation has expressed a willingness to conduct an initial feasibility study, much less spearhead the organization and operation of such a program.
4. **Next Steps:** Survey the congregation to determine whether there is interest in creating an after school program and volunteers who are willing to conduct a study of the economic feasibility of such a program.

D. **Organize a Paid Transportation Service to Dulles Airport**

1. **Basic Concept:** Organize a cadre of volunteer drivers who are willing to pick up and deliver paying passengers travelling in and out of Dulles Airport and possibly other nearby destinations.

2. **Potential Advantages:** There are a large number of individuals living in the upper Shenandoah Valley who travel in and out of Dulles Airport and are willing to pay for transportation to and from the airport. A well-organized program, therefore, could generate a reasonable amount of revenue for the church over the course of a year.

3. **Potential Barriers:** There is an existing airport drop off and pick up service operating out of Winchester and it is not clear whether the market will support a competitive service. Operating such a service would involve a considerable amount of logistical arrangements (e.g., lining up and scheduling volunteer drivers; responding to travel delays and diversions; etc.). And, to date, no one within the congregation has volunteered to assume this responsibility. Plus, we don’t know whether enough volunteer drivers could be recruited from within the congregation to sustain such an operation.

4. **Next Steps:** Survey the congregation to determine: (a) whether congregants are likely to use the proposed transport service were it to be established; and (b) whether anyone within the congregation is willing to spearhead the creation of such an airport transport service.

**Additional Fundraising Activities/Events**

A. **Assemble, Print and Sell a Church Cookbook**

1. **Basic Concept:** Gather and compile recipes from members of the congregation and prepare/publish a church recipe book.
2. **Potential Advantages**: Many other organizations have successfully used cookbook sales as a fundraising project. The inclusion of unusual feature (e.g., cooking "green" and cooking for large crowds) could serve as an inducement to buy the proposed UUCSV cookbook, not only for members of the church but for members of other churches as well.

3. **Potential Barriers**: Cookbooks, like other publications, don’t sell as well as they used to, mainly because today recipes can easily be located on line and stored in readily accessible (paperless) computer files. Even if the cookbook proves to be popular, it is unlikely that the net proceeds from first year sales would exceed a $1,000 and, as with virtually all new books, sales would tail off thereafter. In all probability, therefore, cookbook sales would not be a sustaining source of church revenue.

4. **Next Steps**: Barbara Peters has expressed a willingness to spearhead the preparation of a church cookbook. The question which remains, therefore, is: are there enough members of the congregation who would be willing to submit recipes, help assemble and buy copies of the completed book to make this a worthwhile fundraising project.

B. **Sponsor Weekly (or Monthly), Family-Oriented Spaghetti Suppers**

1. **Basic Concept**: Participants in these suppers would be charged (or asked to donate) an amount that would cover operating costs, with the excess revenues remitted to the church to cover general operating expenses.

2. **Potential Advantages**: If properly organized, these suppers could yield additional revenue for the church while helping to strengthen social connections and build camaraderie within the church family.

3. **Potential Barriers**: At present, no information is available regarding the number of congregants who would be interested in attending such suppers and helping to organize and carry them out. While the proposed suppers might generate some revenue for the church, total net receipts are not likely to be large because there will be pressure to keep prices low to induce higher attendance. Furthermore, attendance and the number of congregants willing to volunteer are likely to drop off sharply over the course of a few months.
4. **Next Steps:** Survey the membership to determine: (a) the level of interested in attending such suppers; and (b) the number of individuals willing to organize and/or help conduct such suppers.

C. **Sell Tee Shirts, Caps, etc.**

1. **Basic Concept:** Buy UUCSV logo T-shirts, baseball caps and other paraphernalia in bulk quantities and sell these items to members and friends of the church at a reasonable profit margin.

2. **Potential Advantages:** The proceeds from such sales would be an additional source of income for the church and would allow members to “fly the colors.”

3. **Potential Barriers:** No information is currently available on the number of congregants who are interested in buying such items. But, even if initial sales were brisk, the prospect of sustaining such sales levels seems dubious. Another sales crew would have to be organized to merchandise the sales items, which inevitably would lead to additional clutter in the already crowded Narthex after Sunday services.

4. **Next Steps:** Survey the membership to determine whether: (a) members of the congregation are interested in buying the proposed items; and (b) there is a sufficient number of volunteers willing to be part of the sales crew.

D. **Sponsor Lectures by Well-Known Outside Speakers**

1. **Basic Concept:** Arrange for well-known speakers to give talks/lectures at the church and sell tickets to cover costs and also provide a profit margin for the church.

2. **Potential Advantages:** Assuming that these events were effectively marketed, such a speaker/lecture series would raise the visibility of UUCSV within the local community and, possibly, also be an additional source of church revenue.

3. **Potential Barriers:** The church would have a very hard time recovering the cost of such a speaker/lecture series, much less generate additional revenue. Even less
well-known speakers charge fees of $5,000 and up for a single lecture and fees for the truly famous start at $25,000 and go up from there. Given the seating capacity of the sanctuary (the church’s only sizable gathering space), ticket prices would have to be prohibitively high just to cover speaker costs.

4. **Next Steps:** Survey a cross section of church members to see if they would be willing to pay $60 to $120 per ticket to attend such a lecture series.

E. **Sell Xmas Goody Baskets**

1. **Basic Concept:** Purchase holiday cookies, candies, fruits and nuts, assemble these items in attractive baskets and sell them in the Narthex in the weeks leading up to Christmas.

2. **Potential Advantages:** In the past, there have been a number of members of the congregation who have organized and sold holiday-related items and earned some money for church activities. So, there is a track record of past success.

3. **Potential Barriers:** Assuming the church continues to sponsor a Holiday Bazaar in 2011 and subsequent year, the sale of Xmas baskets might drain away funds that otherwise would be earned during the bazaar, leaving the church with a small, if any, net increase in revenue. Even under the best of circumstances, it seems unlikely that the net proceeds from the sale of such baskets (after expenses) would amount to more than a few hundred dollars each year.

4. **Next Steps:** Determine whether we should sanction a project that is likely to compete with the Holiday Bazaar.

F. **Sponsor a Breakfast with Santa Breakfast**

1. **Basic Concept:** Organize a multigenerational breakfast in the church Narthex during the weeks leading up the Christmas and arrange to have Santa (Robert Hurt?) stop by to greet the kids and listen to their wish lists.

2. **Potential Advantages:** Such an event would be a great way to involve families with young children and, assuming participants were asked to pay for breakfast, might raise some additional funds for the church.
3. **Potential Barriers**: The breakfast charge (suggested donation) would have to be modest if the goal were to attract a large number of families with young children. But, as a result, the amount of net revenue (profit) received by the church would likely to be low to non-existent.

4. **Next Steps**: Check with the Religious Education Committee and Robert Hurt to see if there is interest in sponsoring such an event (but probably not as a net fundraising activity).

Bob Gettings
Discussion Draft
March 12, 2011
Appendix C

Membership Survey on Revenue-Generating Activities

The results of the recently completed budget campaign underscore the need to broaden and diversify UUCSV’s existing revenue sources. At present, the bulk of UUCSV’s income (89%) is derived from membership (pledge) payments and donations (Sunday offerings), with the balance drawn from other fundraising activities (grocery card/coffee sales & receipts from the annual auction, yard sale, holiday bazaar, etc.). A group of concerned members met recently to explore possible new approaches to generating church revenue. To help us select strategies with significant revenue-raising potential and strong congregational support, we ask that you complete and return this survey questionnaire.

Space Rental Income

Would you support renting church space to a day care/nursery care or senior activity center if lease fees generated a significant amount of new church revenue? [Note: Renting space could mean church groups may have to schedule meetings/activities around the tenant’s operating hours.]

YES ☐ NO ☐

Would you support renting church space for individual/family events or special events sponsored by organizations unaffiliated with the church (e.g., weddings; anniversaries; business retreats; or line dancing groups)?

YES ☐ NO ☐

Would you volunteer to help market the availability of church rentals, or assist with scheduling and/or managing logistical arrangements for such events?

YES ☐ NO ☐

Would you support the erection of a cell tower on the church grounds if an interested telecommunication firm could be found, the tower was located in a remote area of the property and generated a steady stream of rental income for UUCSV?

YES ☐ NO ☐

Sale of Additional Commodities

One proposal is that UUCSV partner with the Shaklee Corp., encouraging members & friends of the church to purchase items from the corporation’s line of eco-friendly, natural home care, personal care and nutritional products, with the church receiving rebates of 20-34% based on sale volume. [Note: Shaklee would set up a dedicated web link and absorb all administrative expenses. No products would be sold on site.]

If this program were to be established, would you be willing to purchase products through the Shaklee website products which you normally buy at local grocery stores and other retail outlets?

YES ☐ NO ☐

Over
Service Activities

Would you be willing and able to accommodate in your home visitors from out-of-town (most of them fellow UUs) who book through the UU’re Home website (which has been in existence for many years and now operates through UU churches nationwide) – with the understanding that all visitor payments would be made directly to UUCSV?

YES ☐ NO ☐

Would you be willing and able to assist in coordinating UUCSV’s participation in the UU’re Home program (i.e., lining up church members willing to accommodate visitors; confirming arrangements; transacting payment, etc.).

YES ☐ NO ☐

Would you be willing to volunteer your time to serve on a work crew performing uncomplicated household and yard tasks for individuals willing to pay for such services – with the understanding that all proceeds from such work would go to the church?

YES ☐ NO ☐

Would you be willing to volunteer your time to drive interested parties to and from Dulles and/or BWI airports if the church were to operate a scheduled trip service – with the understanding that all payments would go to the church (other than mileage reimbursement for use of your personal auto)?

YES ☐ NO ☐

Would you be likely to use such a transportation service three or more times a year?

YES ☐ NO ☐

Additional Sale Items

Please indicate which of the following products you would you be willing to have sold and willing to purchase if they were to be sold in the Narthex and through the church website.

An UUCSV cookbook YES ☐ NO ☐
Logo T-shirts, baseball caps, etc YES ☐ NO ☐
Xmas goodie bags YES ☐ NO ☐

Please indicate which of the following products you would be willing to help produce or sell?

An UUCSV cookbook YES ☐ NO ☐
Logo T-shirts, baseball caps, etc YES ☐ NO ☐
Xmas goodie bags YES ☐ NO ☐

Additional Church Events

Would you and your family be likely to participate in weekly or monthly spaghetti suppers on a frequent basis if they were to be held on a regularly scheduled basis?

YES ☐ NO ☐

Would you be willing to volunteer your time to arrange & prepare food for such suppers?

YES ☐ NO ☐

Name (Optional): ________________________________________________________________
The Unitarian Universalist Church of the Shenandoah Valley
Church Fund Raising Activities Policy
Adopted March 15, 2005
Revised October 4, 2005 (revisions in italics)

The purpose of this policy is to provide guidance for fund raising activities on Church property or in the name of the Church. All such fund raising activities will be approved by the Board. The Board delegates to the Finance Committee the implementation of this policy.

1. Definitions. The fund raising activities of the Church are described below.

a. Main fund raising events.

(1) The Church sponsors 4 main fund raising events (i.e., the "Big 4") each year -- the Annual Canvass, a Service Auction, and two yard sales.

(2) The purpose and activity of the 3 events other than the Annual Canvass will be determined on an annual basis by the Board of Directors. They involve Church-wide coordination, the use of Church funds for "seed money", and the use of the Church infrastructure and communication capacity for accomplishment. The Finance Committee will present a proposed calendar of such events and designated beneficiaries for Board approval in the late spring for the following Church year.

(3) Funds generated from the events in (2) above are for non-budgeted, under-funded, or emergency items. Funds raised at these events are primarily intended to satisfy identified "visions", that is, projects and activities outside the annual operating budget. Some examples might include, for illustration only, extra payments on the mortgage, landscaping, playground equipment, etc. These funds will not be placed within the Church budget and will be accounted for and controlled separately from the annual operating budget. As indicated above, the designation of the use of these funds will be at the discretion of the Board, based upon input from the various Church committees and the congregation channeled through the Finance Committee.

(4) The Finance Committee will have overall responsibility for ensuring the organization and adequate volunteer staffing for these events. It will delegate these functions and detailed planning, coordination, and execution of these events, normally to the committee that is benefiting from the event.

b. Sunday request fund raising.

(1) Individual Church committees may desire to raise funds for items not covered by the annual operating budget. (Note: Individuals would not be allowed to conduct fund raising on Church property without the express approval of the Board of Directors or the Finance Committee, if so designated.) This type of fund raising will be conducted on the 1st and 3d Sundays of each month. The Church administrator will schedule requests from committees in accordance with this guidance. Committees conducting these events may set up no more than 2 tables in the Church foyer. No more than 2 tables (i.e., either one or two fund raisers) will be allowed on a particular Sunday. After service hospitality activities and associated donations are exempt from the restrictions in this
paragraph. Also, exempt are on-going activities that raise funds by sale of products or services and do not constitute a tax-deductible donation, such as purchase of food coupons, bread for FINCA, or free-trade coffee.

(2) No other fund raising will be conducted in the Church foyer beyond these guidelines.

c. Special fund raising events.

(1) Special fund raising events may be appropriate from time to time. Scheduling these will require the approval of the Board of Directors.

(2) These events must benefit a "vision", as mentioned above, a Church committee, or a purpose approved by the Board. While a committee may in turn donate the funds to a charity or cause, the committee serves to supervise the event and the funds.

(3) All such fund raising events by committees will also be scheduled with the Church administrator after receiving Board approval.

(4) The Finance Committee will be informed of each such fundraiser and will maintain records of the events held, the sponsoring committee, and the date of the event.

(5) Fund-raisers by the youth of the Church that do not rely on contributions or donations from the congregation are exempt from the other provisions in section c. These events include, for example, the sale of refreshments at the Apple Blossom Parades and at the summer Bluemont Concerts. The youth and their advisors will determine the use of proceeds from these events.

2. General.

a. Fund raising for purposes outside the committees will be discouraged. Fund raising events within the Church should benefit some portion of the Church community or other worthwhile activity approved by the Board. In any case, the committee structure is the best avenue for this process. This restriction does not preclude individuals from mentioning community events, either as a verbal announcement or through the Church newsletter or bulletin as long as the use of Church property is not involved.

b. The Finance Committee will report to the Board at the end of each fiscal year as to the effectiveness of this policy and their recommended changes, if any.