

A priority of Trinity's Vestry during 2015/2016 is Key Fundraiser Sustainability. Each year it is becoming more difficult to sustain the existing fundraisers (Lobsterfest, House Tour and Cookie Bake). Fundraisers account for over 10% of the budget of the church, paying for outreach and other important expenses of the church. After pledges, fundraisers are the next main revenue generator for the church. Lobsterfest, House Tour and Cookie Bake have been a tradition at Trinity for many years. They not only provide income to the church, but are community events that draw people from the community to the church and introduce prospective members to the fellowship that is Trinity.

However, each year it is becoming more difficult to find chairs and co-chairs for these events. The fundraisers are a huge time commitment for the chairs, as well as for others who help with the events. These fundraisers require a large number of parishioners to help with the events. The community that Trinity draws from has changed. Many in the church and community are becoming older. For younger members, there are other time commitments that prevent people from helping with fundraisers.

We are at a crossroads where we need to evaluate our fundraisers and perhaps consider new ways to obtain the vital funds that are needed to maintain the work of the church. On the next pages, you will find a presentation called 'Key Fundraiser Sustainability' which outlines the goals, financials and plans related to this priority.

A milestone of the Key Fundraiser Sustainability project was to survey the Parish to comment on current and possible future fundraisers. This survey was conducted during January, 2016. There were 101 respondents to the survey. Results of the survey confirmed current vestry thinking on fundraisers and also offered some valuable new ideas. The analysis of the survey follows on page 17.

Key Fundraiser Sustainability

GOAL

- Long Term Goal
 - Church expenses fully covered by pledges and plates
- Short Term Goal
 - Develop plan for managing of major fundraisers

Long Term Goal

- Involves other priorities of the church
 - Attracting of new members
 - McArthur Endowment participation
- Pledges and plate would cover normal expenses of church including personnel, utilities, maintenance and some ministry expenses
- Any fundraising monies would be used for outreach activities not covered by pledges and plate
 - May not be 'guaranteed' on a regular basis

Fundraiser Discussion

- Fundraisers contribute \$48K toward the budget of the church after expenses (details next slide)
- Major fundraisers are:
 - Lobsterfest (pays for Mission Philadelphia)
 - House Tour
 - Cookie Bake
- Obtaining chairs for these fundraisers is becoming more and more difficult

Budget Breakdown

(Based on 2015 budget)

- Net income from fundraisers

	Gross Income	Expenses	Net Income
Lobsterfest	\$37,500	\$18,500	\$19,000
House Tour	\$28,500	\$8,000	\$20,500
Cookie Bake	\$9,500	\$1,000	\$8,500
***Total	\$75,500	\$27,500	\$48,000

- Outreach expenses

	Expenses
Mission Philadelphia	\$21,000
Outreach committee	\$8,000
Diocesan Pledge	\$7,500
Episcopate Assessment	\$15,500
*** Total	\$51,500

- Remaining operating income

Net Income*	Outreach expenses	Operating Income
\$58,000	\$51,500	\$6,500

*Mission Philly receives additional contributions from families and parishioners of \$10K

Sponsors

- Both Lobsterfest and House Tour receive a portion of their income from Sponsors
- Breakdown of Sponsors(based on 2014 sponsorships):

Event	Total	Business	Parishioners
Lobsterfest	\$6700	\$4000	\$2700
House Tour	\$12,525	\$5350	\$7175
Total	\$19,225	\$9,350	\$9,875

- If Parishioners would give the money to the church without the event occurring, this would mean approximately 25% of the net income of Lobsterfest and House Tour could be realized without holding the events.
 - For parishioners to continue to give without the event, they **must** know where their money is going and how it is being used.

Pros and Cons of Current Fundraisers

- Pros
 - Bring in significant funds to the church
 - Tradition for many years at Trinity
 - Community event
 - Pays for Outreach as well as additional funds for normal operating income
 - Social event for parish
 - Exposure to prospective new members of the church
- Cons
 - Difficult to get people to chair
 - Huge time commitment for chairs and others
 - Requires large number of parishioners and some people outside the church on the day of the event (packing day for cookie bake)
 - For House Tour, difficulty in finding homes
 - Clientele changing for participation in events (e.g., community getting older)
 - Lifestyle changes for parishioners prevent participation
 - Competitive community events

Gather Information

- How do other churches chair fundraisers?
 - Discuss with Dave Griffith
- How do other organizations (not churches) manage fundraiser events?
- Discuss options with other parishioners.
- Are there other fundraisers that require less of a time/people commitment but could raise needed funds
- How is the money for Diocesan Pledge and Episcopate Assessment being used?
 - Ask Rick to ask the Bishop for specifics.

Possible outcomes going forward

- Develop plan to reduce time required by chairs for each fundraiser
- Hire a part time fundraiser facilitator to work with chairs and help to reduce time commitment by chairs and other volunteers
- Look to outside resources to manage fundraising events
- Develop new fundraising events that require less time to organize while still maintaining desired funding
- Eliminate some or all existing major fundraising events
 - Eliminate expenses associated with fundraising (e.g., drop Mission Philadelphia)
 - Episcopal pledges would need to still be paid

Next Steps?

- Determine how Episcopal pledges and assessments are being used.
- Contact other organizations to see how they manage fundraisers
- Discuss options with past chairs of fundraisers and other parishioners.
- Survey church to get their thoughts on current fundraisers. Also, include which proposed replacement fundraisers would appeal to people.

Former Chairs survey and focus group objectives

- Determine if chairpersons time could be reduced.
- Options for how fundraiser(s) could be managed more efficiently.
- Determine viability of the 3 key fundraisers going forward.
- Options for making fundraisers sustainable for years to come.
- Determine willingness to chair or co-chair one of the 3 key fundraisers

Parish survey and focus group objectives

- Determine importance to the parish of the 3 key fundraisers.
- Select alternative fundraisers to replace one or more of the current key fundraisers.
- Determine willingness to support the church and outreach without fundraisers.
- Determine willingness to chair or co-chair one of the current fundraisers or an alternative fundraiser.

Other fundraiser ideas

- **Yard Sale**

Doing a big rummage sale or yard sale in the church parking lot on Saturday morning is a fun way to raise funds. You can get people to donate their items for a general sale, sell tables like a flea market does, or even let people sell things from their trunks for a small fee. Put out a general call for items and let parishioners know that you can send a crew around with a truck for big items from the attic or garage.

- **Gardening Supplies**

Another easy way to raise funds in the Spring is to host a garden supply event in the church parking lot. Work with nurseries, yard services, landscaping companies, and mulch or pine straw distributors. Use lots of roadside signs and publicize it the week before to attract a big crowd.

- **Walk/Run or Bike ride event**

No matter what kind of "thon" you choose to run, what you're really setting up is a pledge drive. Your volunteers or participants pre-register and gather pledges for donations, based upon the number of laps or miles they're able to complete on the day of the event.

You'll need a location or a course for your riders, walkers, or runners, pledge sheets for those participants, and volunteers to staff your event, possibly selling food and beverages for a little added profit. After the event, your volunteers return to their pledge contributors and collect the funds they've been promised.

Most people begin planning their "thons" about eight months in advance, allowing plenty of time to choose a course, find participants, and gather pledges.

Other fundraiser ideas (cont.)

- **Food trucks**

This is an fundraising event that has been used by other organizations in the area. It would, most likely, best be combined with another event such as a yard sale. Church would receive a portion of the profits from the food truck vendors.

- **Wine and/or Beer tasting**

This is an event that has been used in the past to support the day school with success. Could be combined with other events like yard sale and may even work well with food truck vendors.

- **Family celebration**

Hold a carnival or faire that would have games and events for all age groups to participate. Perhaps charge an 'entrance' fee or make team competitions that would make money by supporting a particular team. This could also be combined with other events (e.g., food trucks).

- **Virtual House Tour**

Possibly a way to continue house tour without all of the people needed to chair and conduct tours. Also, people may be more willing to have their house on the 'tour' if they know that 500 people will be seeing their house, but not physically going through the house. Perhaps do a video of houses and put on a CD which could be sold.

- **Pig roast or other barbeque event**

Could be combined with other event as well, or done as a standalone event. Preparation would be done by the vendor. Similar to food trucks.

- **Raffle or 50/50 event**

Raffle off a car or other item(s) or have a 50/50 event. These have been tried in the past with some success. Could be combined with other events. Needs to have exposure to community.

Other fundraiser ideas (cont.)

- **Scrip Program**

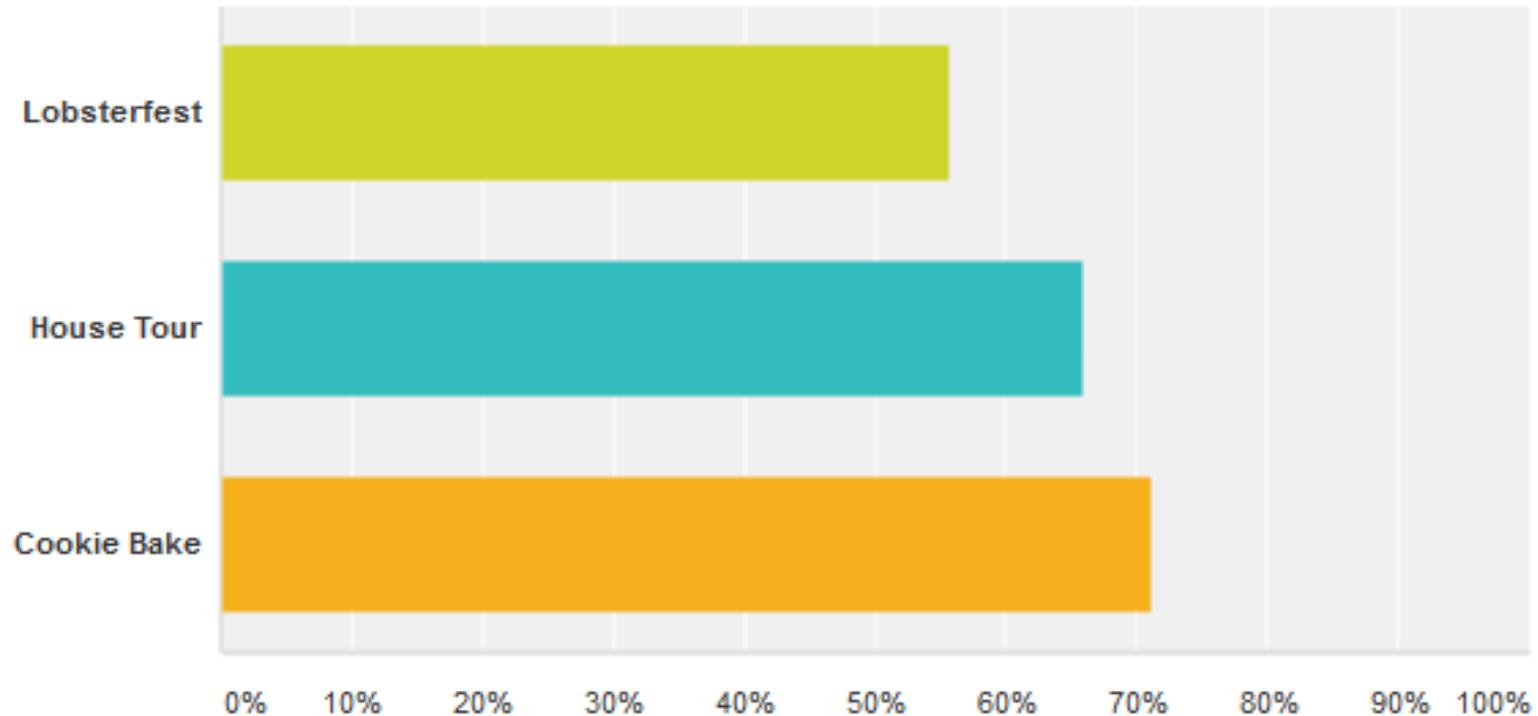
Scrip is a powerful fundraising tool that enables families to raise funds just by ordering gift cards from your church's scrip program to use for their everyday shopping. When they order those gift cards, they'll receive the full value of what they paid, and they'll earn an immediate rebate percentage of what they spent – typically between 3% and 15%, depending on the retailer.

- **Party Book**

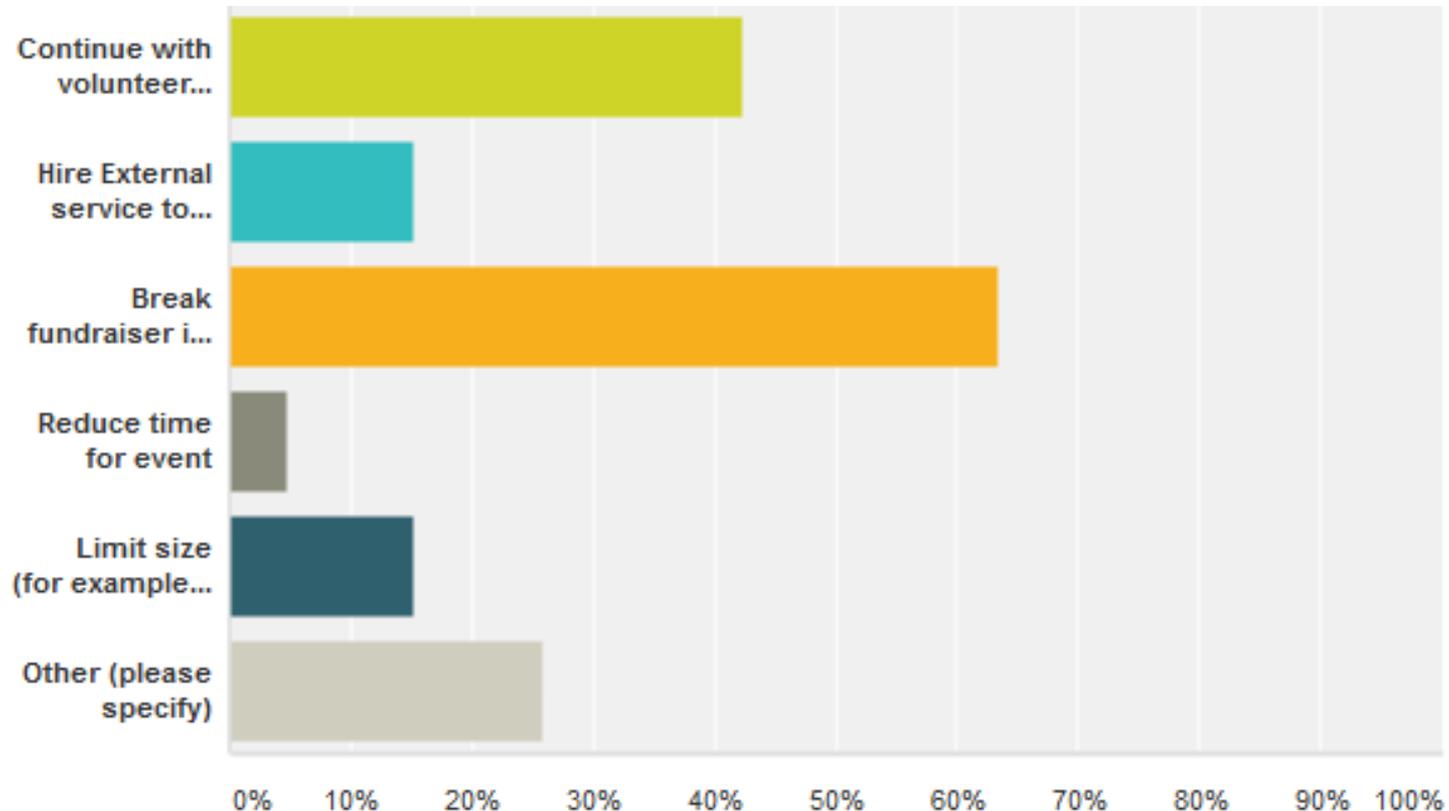
A collection of parties and events hosted by parish members. All proceeds raised through these events will go to Trinity. Party description, party date(s), cost per person, time, number of spots available, party location and host name are included in the book. People requesting a party or event would e-mail to the church.

Parish Survey on Fundraisers

Which of the current key fundraisers are you likely to volunteer in some capacity?



What options would you favor for maintaining the current fundraisers in the future?

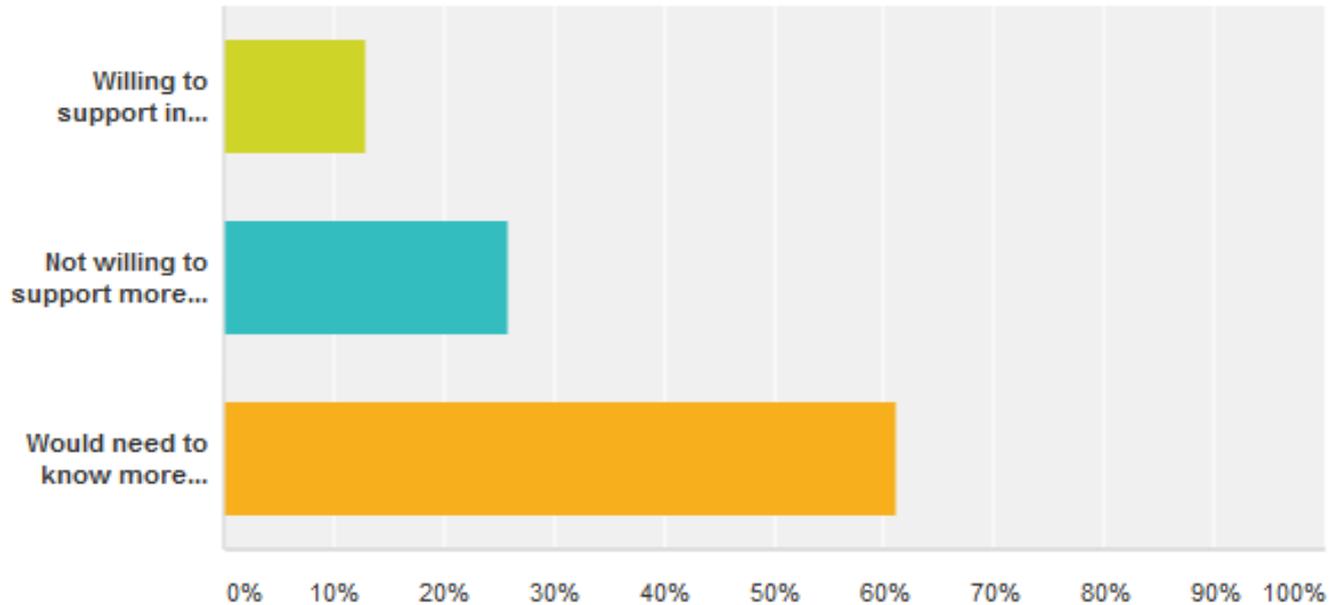


What options would you favor for maintaining the current fundraisers in the future?

Other Responses

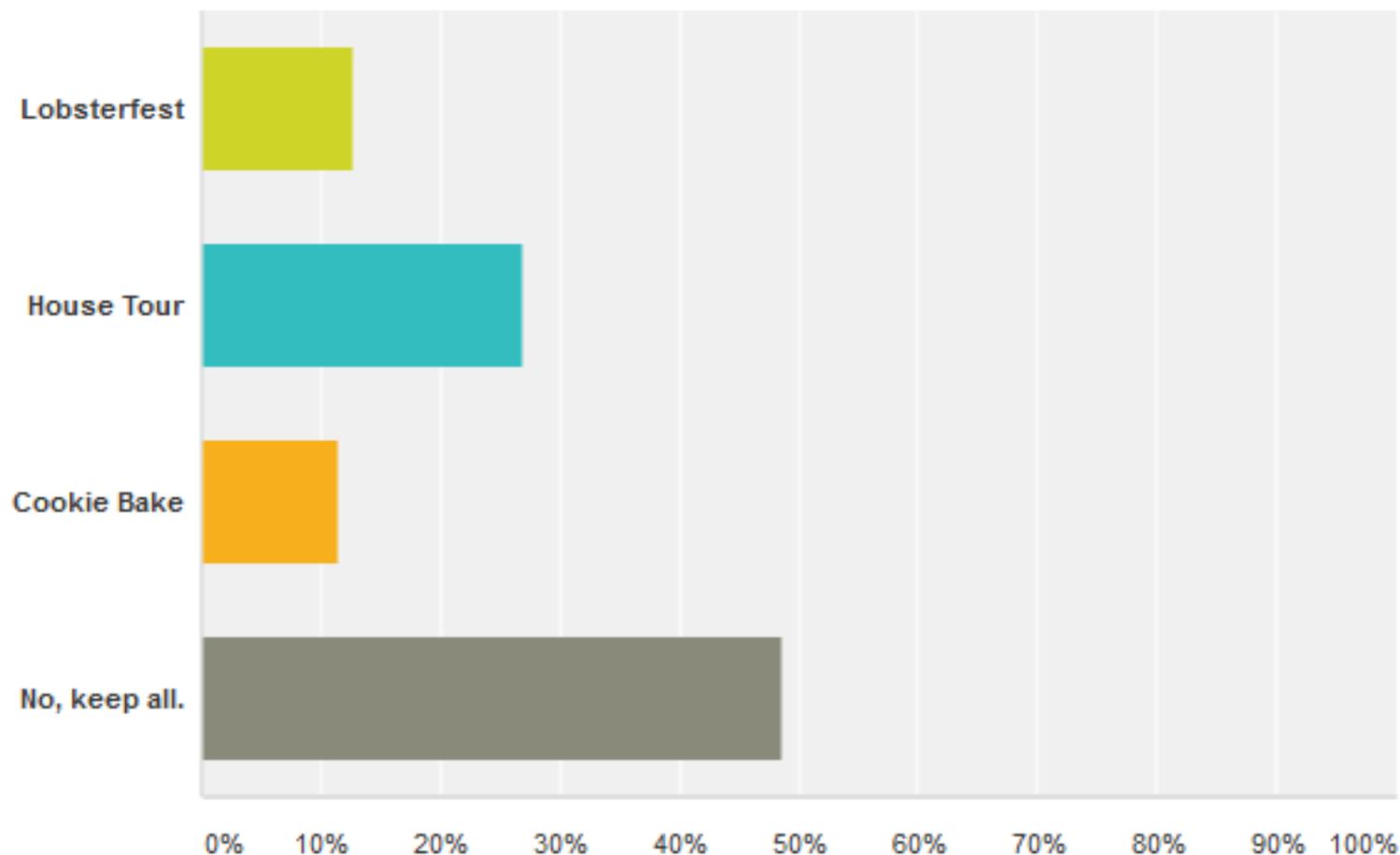
- Perhaps some form of pay for the person responsible for organizing and overseeing a group of volunteers might work. Has this been considered?
- Extend time for event (weekend) especially when many items are involved in fundraiser i.e. Grandmothers attic, crafts, and art .
- Get more Trinity members involved!
- Develop strategies to encourage new / younger family members to commit to participation standards set by their predecessors.
- Consider entirely new fund raisers. Something new always generates enthusiasm, whereas doing the same thing year after year leads to burn-out.
- It is time to decide whether to continue these at all. If membership is not willing to lead them, it does not make sense to "hire" external help. I would rather see Trinity look at partnering with St. Philip's or Buckingham if it is determined that these events need to continue.
- Assistance by pertinent Vestry team & related staff
- Dump House Tour, focus on Lobsterfest as it is more directly tied to outward facing mission work.

Fundraisers help to support the Mission and Ministries of Trinity Church including, Outreach, Mission Philadelphia, and Diocesan pledge(support of the larger church). If one or more of the fundraisers were dropped, would you be willing to continue to support these important programs?

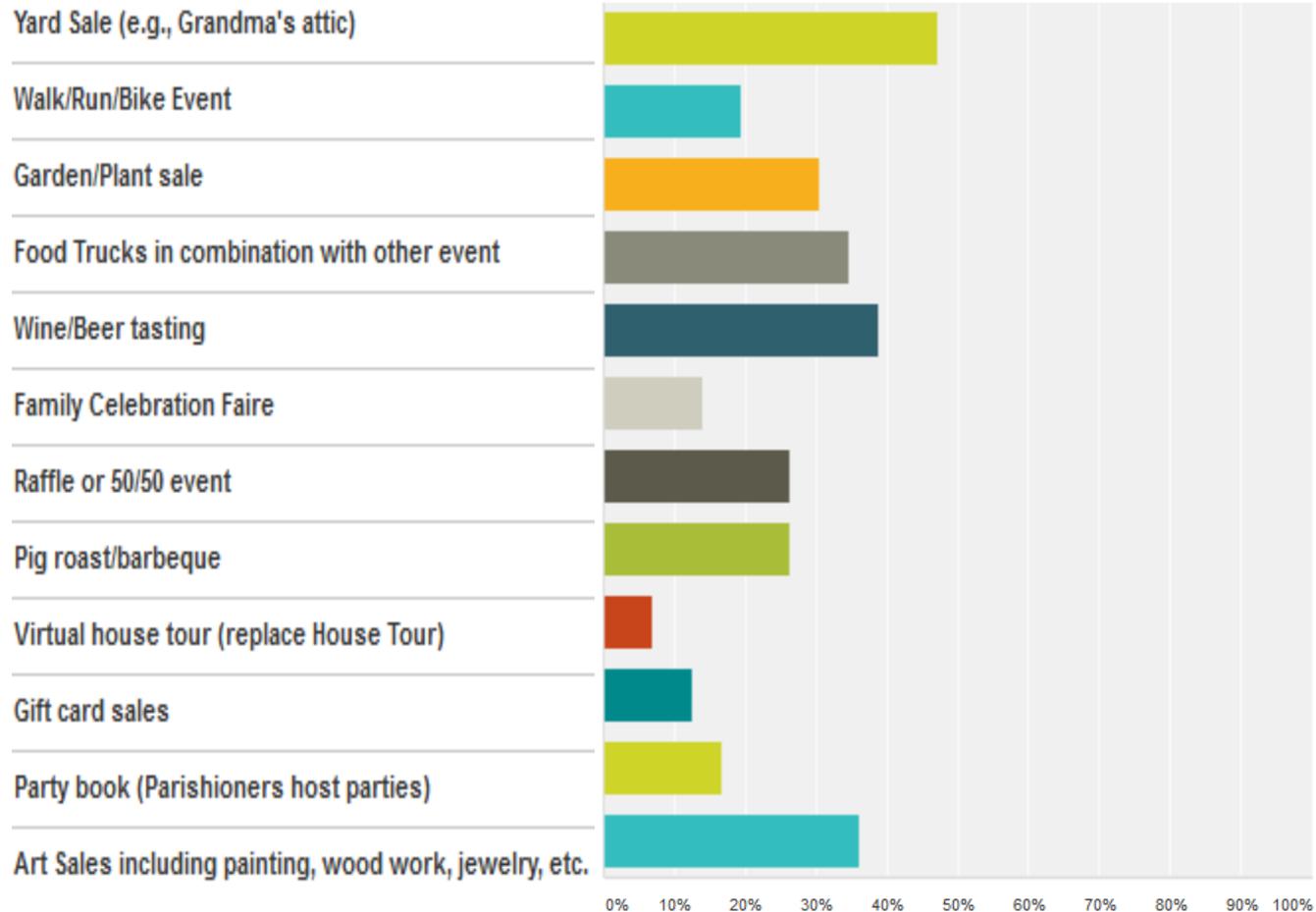


Answer Choices	Responses
▼ Willing to support in addition to my current pledge/plate.	12.94% 11
▼ Not willing to support more than my current pledge/plate.	25.88% 22
▼ Would need to know more before committing above my current pledge/plate.	61.18% 52
Total	85

Are any of the fundraisers no longer sustainable (e.g., can't get chairs/co-chairs, difficulty finding houses for HT, Lobsterfest insufficiently funding MP) and should be dropped? If so, which one?



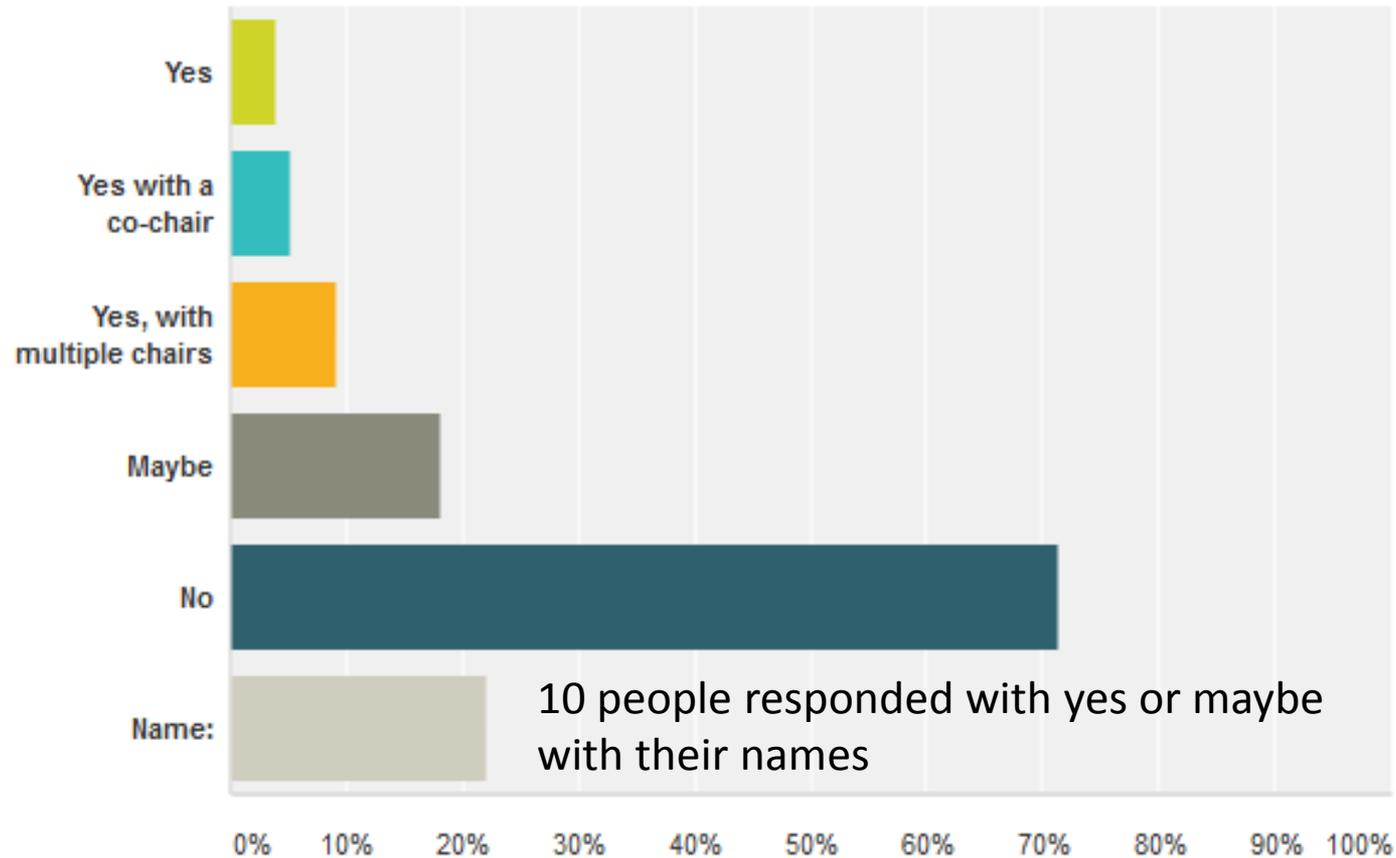
We are considering alternatives to one or more of the current fundraisers. Which of the following do you think would be successful at Trinity?



Other alternative fundraiser suggestions?

- Garden tours of church member properties in Spring
- Poinsettia sales
- Church dinners (open to public)
- Summer fair (food - water ice, cotton candy, etc., games)
- There are many online auction sites for non profits, ex:
<https://www.biddingforgood.com/auction/biddingforgood.action> The downside is no personal contact or community building.
- Penny drives, community children's art show, publishing, community based educational opportunities; move toward ideas where 2 or 3 are gathered.
- Small clothing sale, send left over clothing to Haiti
- Antiques Road Show event where experts would appraise items for a fee.
- People come for music...Bring an orchestra member to play the organ, or other soloists. Music festival gala type event at nice estate with Outreach theme potentially partnering with St. Phillips and/or Trinity Buckingham
- Cameron Stark owns Unionville Winery in New Jersey. He presently is making wine from the grapes from our Churches vineyard. Lets have a big unveiling, wine pairing and charge admission.
- Promote credit card usage , Amazon smile and other similar fundraisers. (Responder felt these have not been adequately promoted within the Parish.)
- Art sale, theme dinner

Would you be willing to chair or co-chair one of the events in the future?



Please list any additional comments below including new ideas for funding:

- An activity with entire family friendly activity highlighted and an entire family/families as chair people. i.e. run, walk, ride
- Consider downsizing lobsterfest, seems still viable but we have too much risk on the expense side of running the event
- Need to do cost benefit analysis before we jump into any of these to make sure it will work. (John Daukas said he can help with the cost benefit analysis reviews.)
- Maybe there would be some benefit to having an external fundraiser come in, evaluate what makes Trinity unique and special and design a fund raiser that meets the financial needs and focuses the volunteer effort into one or two major events. I could not in good conscience put my name down to chair something as I did that for 3-4 years when we used to have more activities focused around the holidays.
- Perhaps with the Youth Group as small as it currently is, put a limit on the number of youth (and therefore adults) that may go to Mission Philly. Then, some of the \$ from the Lobster Fest can go to the church for daily costs.
- Pass a special offering plate every year on Mother's Day, the anniversary of the fire, to specifically pay down the principle on the mortgage. Paying down the mortgage faster will free up funds needed elsewhere.
- I know we would take a financial hit but I really think we should hire a community organizer to spear head the present events. Perhaps even organize a Vacation Bible School too!
- Donation appeal to underwrite specific causes (MP, Outreach, needy family, etc.
- I believe combining one of our current ones with a new twist, i.e. smaller house tour (less houses) with a family fall fair would then be able to draw a wider audience than something so limited to an older group. Or a Lobsterfest with a yard sale, etc.
- Strongly suggest focusing on one spring fundraiser and one fall activity.
- Grow membership and the pledge. Look at combining like minded churches.

If you would like to be contacted by a team member to provide more details or additional comments, put your name and contact information below.

- 16 Parishioners responded and are being contacted for additional discussion on fundraisers
 - Names, e-mails and phone numbers have not been included on the results document that is on the internet. Any questions, contact Rick Vinson or Mike Yount.

Conclusions

- Most parishioners want to keep all current fundraisers, keep volunteer chairs but break fundraisers into more manageable tasks. However, most are not willing to chair or co-chair.
Partner with other churches (e.g., St. Philip's or Trinity Buckingham)
- To make up monies for dropped fundraisers more education is needed for people to support above their current pledges. Parishioners want to know how church uses money and, in particular, how money outside of operations of the church is spent.
- For proposed fundraisers, yard sale, wine and beer tasting, art sale and food trucks in combination with other events were thought to be the most successful.
- Other possible fundraisers included Spring garden tours, online auctions, and music festivals.
- Perform cost benefit analysis on all proposed fundraisers before moving forward.
- Look for ways to increase profit margins on existing (remaining) fundraisers. Examples might include during Cookie Bake, sell poinsettias, gift cards, etc.
- Other funding suggestion of passing the plate on Mother's day, the anniversary of the church fire, to pay off the mortgage.
- Need to find ways to attract new members to Trinity. More involvement in community activities in the name of Trinity may help to draw people to the church.
- May want to have an external fundraiser come in, evaluate what makes Trinity unique and special and design a fundraiser that meets the financial needs and focuses the volunteer effort into one or two major events.
- Limiting to two events, one in Spring and one in Fall.