



Unitarian Universalists of Santa Fe

PLEDGE DRIVE 2022-2023

Final Report

July 16, 2022

Roberta Armstrong

Gregory Berg

Brent Farler

Mary Beth Kuderik

Jack Seigel, Vice President for Finance, *ex officio*

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Purpose of this Report

This report will (a) summarize the work of the 2022-2023 Pledge Committee, and (b) provide guidance to persons who serve on future pledge teams. Many documents in the Appendices and on Google Drive can be re-used by the next pledge team.

Executive Summary

The results for the 2022-2023 year were very good for several reasons.

1. The dollar amount pledged was a 7.3% increase over the prior year. This is the largest dollar amount pledged since 2016-2017.
2. The number of pledges increased by 3%.
3. 59% of pledgers increased their pledges this year, with fewer staying the same or reducing their pledges.

The 2022-2023 pledge drive goal was to raise a total of \$300,000, a target \$35,000 greater than the previous year's pledge goal. The actual pledge total of \$285,569 as of June 30, 2022, represents 95.2% of the goal. \$280,000 of projected pledge income was included in the 2022-2023 revenue budget, representing about 76% of the revenue budget of \$366,500 that was approved by the Community at the May Annual Meeting.

The distribution of pledge amounts has not changed much over the past several years. We continue to have relatively few large pledgers; for 2022-2023, 26 pledges (15%) represent 45% of the amount pledged.

Contributing to this year's success were the extraordinary efforts by Rev. Gail, the AV team and others to create engaging slides shows and videos. These short pieces kept the campaign in mind throughout the canvass. Other factors include excellent data management and follow-up.

Overall, the 2022-2023 pledge campaign yielded one of the most positive results in years and brought us closer to bringing pledges in better alignment with budgetary needs. The Team recommends that a similar process be followed next year.

Results of 2022-2023 Pledge Drive

The pledge information reported here includes pledges received through June 30, 2022, as recorded in Breeze.

The results for the 2022-2023 year were very good:

1. The dollar amount pledged, \$285,569, was a 7.3% increase over the prior year. This is the largest dollar amount pledged since 2016-2017.
2. The number of pledges increased by 3%.
3. 59% of pledgers increased their pledges this year, with fewer staying the same or reducing their pledges.

The 2022-2023 pledge drive goal was to raise a total of \$300,000, a target \$35,000 greater than the previous year’s pledges received. The actual pledge total of \$285,569 as of June 30, 2022, represents 95.2% of the goal. \$280,000 of projected pledge income was included in the 2022-2023 revenue budget, representing about 76% of the revenue budget of \$366,500 that was approved by the Community at the May Annual Meeting.

Because we had explicitly suggested increases this year, either inflation at 5.3% or a much larger increase, 12%, we wanted to determine whether this ask was effective. The table below shows it definitely was! Of the 151 pledgers who pledged for 2021-2022 and 2022-2023, 59% increased their pledges this year, and 39% of the pledgers increased by 12% or more.

2022-2022 Pledge Compared to 2021-2022 Pledge	Number of Pledges	Median Increase	Percent
12% or more increase	59	14%	39%
Smaller increases	30	6%	20%
No change	44	0%	29%
Reduced their pledges by a median of 40%	18	40%	12%
	151		100%

We are expecting additional pledges during the year from new members that will modestly increase the total.

We added 14 pledge units during 2022-2023; 10 pledges (representing 11 individuals) totalling \$11,030 were received from this group, showing a strong level of commitment for new members.

61 pledge units selected the EverGREEN option this year (compared to 58 last year, 48 at the same level and 13 with inflationary increases).

The pledge distribution is shown in Table 1 below. The distribution of pledge amounts has not changed much over the past several years. We continue to have an over-reliance on relatively few large pledgers; for 2022-2023, 26 pledges (15% of the total number) represent 45% of the amount pledged.

Table 1. Distribution of 2022-2023 Pledges by Amount Pledged

Pledge Amount	No. Pledges	Total Contributed	Percent of Total	Cumulative Percent of Total
\$1-100	8	\$461	0.2%	0.2%
\$101-500	40	\$12,486	4.4%	4.5%
\$501-1,000	29	\$20,764	7.3%	11.8%
\$1,001-1,500	30	\$38,114	13.3%	25.2%
\$1,501-2,000	15	\$26,113	9.1%	34.3%
\$2,001-3,000	23	\$60,255	21.1%	55.4%
\$3,001-4,000	10	\$36,124	12.6%	68.0%
\$4,001-5,000	6	\$27,712	9.7%	77.7%
\$5,001-10,000	10	\$63,540	22.3%	100.0%
	171	\$285,569	100.0%	

The table below shows summary pledge statistics by year.

Table 2. Summary Pledge Statistics by Year

	2011-2012	2012-2013	2013-2014	2014-2015	2015-2016	2016-2017	2017-2018	2018-2019	2019-2020	2020-2021	2021-2022	2022-2023
Total \$K Pledged	\$329.4	\$328.8	\$308.9	\$286.5	\$291.9	\$271.1	\$251.2	\$251.1	\$249.0	\$249.1	\$266.2	\$285.6
No. of Pledges	223	217	188	177	171	168	165	149	153	148	166	171
Mean Pledge	\$1,477	\$1,492	\$1,643	\$1,619	\$1,835	\$1,741	\$1,530	\$1,684	\$1,628	\$1,683	\$1,604	\$1,670
Median Pledge	\$890	\$900	\$1,050	\$1,020	\$1,200	\$1,025	\$1,000	\$1,060	\$1,000	\$1,200	\$1,145	\$1,200
Pledges <\$100	8	5	4	5	3	6	8	5	5	8	4	5
Percent Change in Amount	NA	-1.70%	-4.60%	-7.30%	6.30%	-9.70%	-9.30%	-0.10%	-0.01%	0.00%	6.86%	7.29%
Percent Change in # Pledges	NA	-2.70%	-13.40%	-5.90%	-6.20%	-5.40%	-1.80%	-9.70%	3.00%	-3.00%	12.16%	3.01%

Process, Timing and Work Steps

This pledge drive, like last year's, took place during the COVID-19 pandemic. Many UU Santa Fe meetings and worship services were being held online using internet platforms such as Zoom and YouTube or in hybrid mode with some people in person and others online.

The Pledge Team initially met via Zoom in November 2021. Roberta Armstrong, Greg Berg, Brent Farler and Mary Beth Kuderik comprised the team; Jack Seigel, Vice President for Finance was an *ex officio* member. The Team met frequently via Zoom during the drive and communicated almost daily via email. During the same period, the full Finance Team met via Zoom on a regular basis to discuss the 2022-2023 draft budget.

In collaboration with the Finance Team a pledge goal of \$300,000, \$35,000 more than the 2021-2022 goal was established. We recognized this was a challenging goal, but it was what was required to support the proposed budget, which included an increase in hours for the program ministry position, the half-time Business Manager and a 5.3% COLA for staff. The Team also sought a pledge from each pledge unit that pledged last year and anyone who might pledge for the first time (e.g., new members, friends).

We didn't adopt a theme this year, choosing to focus on appreciation for the generosity of the UU Santa Fe Community and sharing information on how our financial gifts are used to support our mission. Heavy use was made of our video capabilities with slide shows and videos created with the support of Rev. Gail and the Tech Team.

Campaign videos included:

- March 13, 2022—Rev Gail and Sherry 2022 Pledge Kick-off Video
- March 20, 2022—Behind the Scenes at UU Santa Fe Pledge Campaign 2022 narrated by Aaron Leventman
- March 30, 2022—Come, Come, Whoever You Are! Narrated by Steven Mead
- April 4, 2022—Greg Berg 2022 Pledge Video

In addition, several Community members provided their personal testimonials:

- March 20, 2022—Jim Eagle Pledge video
- March 27, 2022--George Weston Pledge Video
- April 3, 2-22—Holly Kinley Pledge Video
- April 3, 2022—Ann Hume Pledge Video
- April 20, 2022—Leon Winston and Michael Morford Pledge Video

All campaign videos may be found on our YouTube channel under Playlists.

The campaign began on March 13, 2022, and ended officially on April 20, 2022, although follow-up continued well past that point. An initial list of about 250 members and friends was compiled and refined with the help of Rev. Gail and Elizabeth Swope from the Community Life Team.

Activities included:

- Pre-campaign publicity in the *UU Santa Fe Weekly* eNewsletter
- Pre-campaign solicitation of Board members at the February 23, 2022, board meeting. This appeal resulted in 8 pledges totalling \$29,170, an average of \$3,646, substantially higher than the overall pledge average.
- Preparation of a pledge packet with a Board message, a pledge form, and a letter; an online pledge form was also created

- Mailing a pledge packet on March 10, 2022, with the Board message and a personalized letter including previous year pledge information and a precalculated inflationary increase or a stretch goal increase of 12% as well as the option to make the pledge EverGREEN (continuing)
- Sending general email campaign update and reminder on March 20 and April 6, 2022
- Presentation of four videos about the Community during March and April, 2022; these were prepared by Rev. Gail, Sherry Kraemer, Aaron Leventman, Steven Mead and Greg Berg
- Presentation of five testimonials during worship services. The presenters were Jim Eagle, Greg Berg, George Weston, Ann Hume, Holly Kinley, and Leon Winton & Michael Morford
- Frequent updates via the website, *UU Santa Fe Weekly* and weekly livestream service
- Personal thank-you letters for every pledge
- Extensive follow-up by email and telephone for those who hadn't pledged yet during April, May and early June

Our 2022-2023 Pledge packet included:

- A general letter
- Personalized letters
- A message from the Board and Minister (Appendix A)
- The 2022-2023 Pledge Form (Appendix B)

This year's pledge form was similar to last year's and offered pledgers the option of making their pledge "EverGREEN," continuing each year at either the same level or with an inflationary increase. A Breeze online pledge form was also created and used for those who preferred that option and to include in follow-up emails. This was the fourth pledge campaign since the introduction of the Evergreen concept.

Four different personalized letters and pledge forms were produced:

- Letter 1—to Board members (Appendix C)
- Letter 2—to 2021-2022 Pledging Members and Friends (not EverGREEN) (Appendix D)
- Letter 3—to 2021-2022 EverGREEN pledgers (similar to Letter 1 but recognizing the EverGREEN option selected) (Appendix E)
- Letter 4—to Friends and Members who didn't pledge in 2021-2022 (Appendix F)

The pledge drive ended officially on April 20 with 131 pledges; following that we initiated telephone, email and in-person follow-up activities with the 80 individuals on

our original list who hadn't pledged yet. 33 pledges totalling \$40,039 came in after April 20.

Everyone who pledged received a thank you letter with their name and pledged amount (Appendix G) within about a week of receipt and a Frequently Asked Questions about UU Santa Fe Pledges and Finances document (Appendix H).

Recommendations for Next Pledge Drive

Overall, the process and timing for 2022-2023 yielded a very positive result. The Team recommends that a similar process be followed next year including:

- Use a similar process and time schedule as was used for 2022-2023.
- Continue to set a goal that represents what UU Santa Fe needs.
- Continue to use a Pledge Team that is a subset of the Finance Team; consider adding one or two others with useful perspectives (e.g., PEC).
- Develop and work to a comprehensive project plan if possible and document activities more completely.
- Continue to use Google Drive as a location for storage of pledge documents.
- Continue to do a solicitation of Board members in advance of the kick-off date.
- Continue to recruit a members and friends to do testimonials during the worship services; these appear to be effective tools in keeping UU Santa Fe's needs before the Community
- Reconsider our focus on EverGREEN pledges and evaluate its effectiveness; this year's focus on the need for larger increases may be more useful.
- Use selected one-on-one interaction—perhaps targeted to top pledgers and new members
- Hold an all-member in-person event to kick off the pledge campaign in an engaging way if feasible and consider a small celebration at the end of the campaign.
- Continue to encourage use of the online pledge form. The online form has also become a very useful tool for those who are doing follow-ups as it can be completed during the follow-up conversation and results in a record for the pledger and the campaign.
- Encourage submission of pledges by the pledge deadline; follow-up activities are rewarding and very time consuming.
- Schedule the pledge campaign in collaboration with UU Santa Fe leadership to ensure minimum overlap with other major activities.

Appendixes

Appendix A: A Message from the Board and Minister (2 pages)



February 8, 2022

Dear Friends,

You, the members and friends and volunteers and staff of UU Santa Fe, are quite wonderful. Thanks to your patience, flexibility, commitment and generosity UU Santa Fe is not just surviving the pandemic, we are thriving in this strange time:

- Viewership is up. We have 600 subscribers to our YouTube channel.
- About 250 people watch the most recent Sunday service in the course of the week.
- Membership is steady and we have added 20 new members since the pandemic began in March 2020
- Group participation is up. Thanks to Steven's dedication in teaching all of us how to Zoom, our group participation in the last 2 years has increased from about 120 participants to over 300. That's more than our membership!
- Giving is up. We have done several fundraisers and special appeals in the last year. We funded our solar project, we celebrated Gail's first decade at UU Santa Fe and raised nearly \$14,000 to support the endowment, you have donated generously to support our community partners. We held a mega sale and a book sale and a Mardi Gras auction and we have exceeded our goals every single time.

As we said – you are amazing.

Now we need you to do something much less glamorous but just as important—the next step in amazing is to fully fund our 2022-2023 operating budget. Let us tell you why: In the course of this pandemic we have changed. We have become a multi-platform congregation.

That means that worship, small groups, neighborhood groups, classes, committees, social justice efforts, fund raising and everything else we do happen on-line as well as on-site when possible. Part of what's so cool about being a multi-platform community is that when COVID is quiescent and we can be together things can happen in hybrid form, both on site and online. And when COVID is active and we need to be careful (or when the weather is bad) we can move completely on line. We don't need to miss a beat. Being multi-platform means that time and location are no longer barriers to participation at UU Santa Fe. We have old friends who have participated from central America and others in hospice who were able to come to worship even after they were home-bound.

But it is more work for volunteers and for staff. Multiplatform ministry means we need to envision every offering in at least 2 formats and we need to take extra care to stay connected by telephone and email.

Our experience (at UU Santa Fe and across the UUA) for the last 23 months has persuaded us that a multi-platform congregation that allows people to participate online, onsite or hybrid as circumstances and preferences dictate is the future of church. We have an amazing team of volunteers and staff that has made our transition to this new multi-platform world pretty smooth, but we had no idea when we started this that it would be permanent. Now that we are aware that it is the shape of community for the foreseeable future we need to staff for that future.

You may not be aware of how lucky we have been with Steven Mead—our program ministry staff member. We hired Steven as a consulting religious educator five years ago, but we got so much more. Steven's deep knowledge of Unitarian Universalism, his organizational abilities and his tech skills were a major reason we navigated the pandemic as well as we have. His efficiency and flexibility meant that we were able to shift his job description as program demanded. His generosity allowed us to reallocate some of his hours and compensation this past year to upgrade our bookkeeping position to a Business Manager and relieve some stress on our dedicated volunteers.

That down shift in program support and tech support showed us just how much Steven has been doing and we realized that we really do need at least a ¾ time program ministry staff position to sustain the level of programming we presently have. If we want to deepen our in-reach programming and widen our outreach we will need even more staff hours. But that's still in the future.

For the 2022-2023 budget year we need to increase pledging enough to sustain our current program level and take a little stress off our tech and computer volunteers. With inflation being what it is (over 5% in 2021)—that looks like a 12% increase in pledge income. We know not everyone can afford to increase their giving by 12% but if the folks who have more can give more than 12% and the folks who have less can increase at least a little and the folks who aren't pledging at all can take the plunge and donate something we will make it work.

These are transformational times, friends, and they call for a transformed Unitarian Universalism. With the right kind of support for our teams and committees, classes and groups UU Santa Fe can continue to participate whole heartedly in UUA initiatives from UUA legislative advocacy, widening the circle, voting rights and in local efforts to end hunger and poverty, support domestic violence prevention initiatives, support fair immigration and keep our state green and beautiful.

- Together we are navigating the pandemic
- Together we are becoming a multi-platform congregation
- Together we can fund this canvas
- Together we can help heal our world

Blessings,

Rev Gail Marriner, Minister

Sherry Kraemer, President, UU Santa Fe Board of Trustees

Appendix B: 2022-2023 Pledge Form



UU Santa Fe 2022-2023 Pledge Form (July 1, 2022-June 30, 2023)

Please return as soon as possible to the office, by mail (to UU Santa Fe, P. O. Box 4637, Santa Fe, NM 87502-4637) or scan to PDF and email to financeteam@uusantafe.org.

Your contact information (please update if needed):

Name(s): _____
Address: _____
Mobile Phone: _____ Home Phone: _____
Best Email: _____

My/Our 2022-2023 pledge (full-year amount) _____

Do you want your pledge to be EverGREEN (continue each year)? We'll contact you to confirm.

- Yes, continue at same level Yes, add annual inflationary increase (EverGREEN Plus)
 Not this year

How do you plan to make payments on your pledge?

- By check (preferred) By bank bill pay service By stock donation
 By credit card (3+% transaction charge to UU Santa Fe) Other (note below)

Comments or questions? We'll get back to you!

UU Santa Fe Use (Enter date/initials)

_____ Received _____ Stewardship File _____ Breeze _____ Thank You

Appendix C: 2022-2023 Letter to Board Members



Unitarian Universalists of Santa Fe

P.O. Box 4637, Santa Fe, NM 87504 Phone: 505.982.9674

Nurturing hearts and minds, practicing beloved community and working for justice

February 4, 2022

Addressee
Address
City, State Zipcode

Dear First Name(s),

We are writing to you as a board member to launch our annual pledge campaign for July 2022-June 2023. Your early response will kickstart the campaign which begins March 13.

It is remarkable how UU Santa Fe has been able to maintain a strong sense of community and a wide range of programming by successfully adapting our operations. At the same time, we continue to impact the broader community with our social justice activities.

Our finances are in pretty good shape but also remain somewhat vulnerable. We were fortunate last year to receive government assistance through the Paycheck Protection Program (PPP). This grant allowed us to keep our staffing level and 'balance' our budget. Moving to online required investing in audio/video equipment and adding Zoom accounts while most operating costs continued at the pre-pandemic levels. We have no PPP grant available for the upcoming year and faced inflationary pressure of about 5% last year.

While many of our members have faced challenges, the level of support for our congregation has remained high. We are hoping to build on the successes of our pledge campaign last year, where we saw an increase in the number of pledges and an increase in the dollar amount pledged. Our pledge goal for the upcoming year is \$300,000, which is a significant increase from the pledge total of \$267,000 for the current year. This increase will support a balanced budget that includes the staffing changes that have been discussed by the Board.

Our ministry is everything that we do together. Sometimes it is easy to overlook how much work by staff and volunteers is going on "behind the scenes" to maintain and adapt the infrastructure that supports our mission. We have been re-inventing our community in many positive ways so that we can continue to live our values together. Our weekly worship gatherings touch many lives and maintain strong connections.

Your pledge form is on the back of this letter. We would appreciate if you can return it by March 1, 2022, by mail, or email a copy to financeteam@uusantafe.org or complete it online at <https://uusantafe.breezechms.com/form/2021-2022PledgeForm61>.

With optimism and hope, your 2022-2023 Pledge Team, Roberta Armstrong, Gregory Berg, Brent Farler & Mary Beth Kuderik.

P.S. The Board and Minister's Message enclosed will tell you more, and our website members only page (www.uusantafe.org/membersonly) provides additional information.

Appendix D: 2022-2023 Pledging Members and Friends (not EverGREEN) Letter



Unitarian Universalists of Santa Fe

P.O. Box 4637, Santa Fe, NM 87504 Phone: 505.982.9674

Nurturing hearts and minds, practicing beloved community and working for justice

March 13, 2022

<addressee, address>

Dear <salutation>,

We are writing to you to launch our annual pledge campaign for July 2022- June 2023.

It is remarkable how UU Santa Fe has been able to maintain a strong sense of community, and a wide range of programming by successfully adapting our operations. At the same time, we continue to impact the broader community with our social justice activities.

Our finances are in pretty good shape but also somewhat vulnerable. We were fortunate last year to receive government assistance through the Paycheck Protection Program (PPP). This grant allowed us to keep our staffing and 'balance' our budget but moving to online required investing in audio/video equipment and adding Zoom accounts while most operating costs continued at the pre-pandemic levels. There is no PPP grant for the upcoming year.

While many of our members have faced challenges, the level of support for our congregation has remained high. We are hoping to build on the successes of our pledge campaign last year, where we saw an increase in the number of pledges and an increase in the dollar amount pledged. Our pledge goal for the upcoming year is \$300,000, which is a significant increase from the pledge total of \$266,000 for the current year.

Our ministry is everything that we do together. Sometimes it is easy to overlook how much work by staff and volunteers is going on "behind the scenes" to maintain and adapt the infrastructure that supports our mission. We have been re-inventing our community in many positive ways so that we can continue to live our values together. Our weekly worship gatherings touch many lives and maintain strong connections. The breadth of our programs and community outreach has meaningful effects.

Your pledge form is on the back of this letter. We would appreciate if you can return it by April 15, 2022, by mail, or email a copy to financeteam@uusantafe.org or complete it online at <https://uusantafe.breezechms.com/form/2022-2023PledgeForm>.

With optimism and hope, your 2022-2023 Pledge Team, Roberta Armstrong, Gregory Berg, Brent Farler & Mary Beth Kuderik.

P.S. The Board and Minister's Message enclosed will tell you more, and our website members only page (www.uusantafe.org/membersonly) provides additional information.

Appendix E: 2022-2023 EverGREEN pledgers Letter



Unitarian Universalist of Santa Fe

P.O. Box 4637, Santa Fe, NM 87504 Phone: 505.982.9674

Nurturing hearts and minds, practicing beloved community and working for justice

March 13, 2022

Addressee
Address

Dear First Name(s),

We are writing to you to launch our annual pledge campaign for July 2022- June 2023. Thank you again for being part of the 15% of our community that has chosen to go EverGREEN (i.e. continue your pledge at the same or inflation-adjusted level). Our pledge goal for the upcoming year is \$300,000, which is a significant increase from the pledge total of \$266,000 for the current year. Thus, we are asking our EverGREEN pledgers to consider a 12% increase to help us meet our goal and maintain a balanced budget.

It is remarkable how UU Santa Fe has been able to maintain a strong sense of community, and a wide range of programming by successfully adapting our operations. At the same time, we continue to impact the broader community with our social justice activities.

Our finances are in pretty good shape but also somewhat vulnerable. We were fortunate last year to receive government assistance through the Paycheck Protection Program (PPP). This grant allowed us to keep our staffing and 'balance' our budget but moving to online required investing in audio/video equipment and adding Zoom accounts while most operating costs continued at the pre-pandemic levels. There is no PPP grant for the upcoming year.

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Your pledge form is on the back of this letter. We would appreciate if you can return it by April 15, 2021, by mail, or email a copy to financeteam@uusantafe.org or complete it online at <https://uusantafe.breezechms.com/form/ab0680766>.

With optimism and hope, your 2021-2022 Pledge Team, Roberta Armstrong, Gregory Berg, Brent Farler & Mary Beth Kuderik.

P.S. The Board and Minister's Message enclosed will tell you more, and our website members only page (www.uusantafe.org/membersonly) provides additional information.

Appendix F: Letter to Friends and Members who didn't pledge in 2021-2022



Unitarian Universalists of Santa Fe

P.O. Box 4637, Santa Fe, NM 87504 Phone: 505.982.9674

Nurturing hearts and minds, practicing beloved community and working for justice

March 13, 2022

Addressee

Address

City, State Zipcode

Dear First Name(s),

We are writing to you to launch our annual pledge campaign for July 2022- June 2023. You are an important member or friend of our community, but for some reason did not make a financial pledge last year. Please consider making a pledge this year to help support your UU Santa Fe community.

It is remarkable how UU Santa Fe has been able to maintain a strong sense of community, and a wide range of programming by successfully adapting our operations. At the same time, we continue to impact the broader community with our social justice activities.

Our finances are in pretty good shape but also somewhat vulnerable. We were fortunate last year to receive government assistance through the Paycheck Protection Program (PPP). This grant allowed us to keep our staffing and 'balance' our budget but moving to online required investing in audio/video equipment and adding Zoom accounts while most operating costs continued at the pre-pandemic levels. There is no PPP grant for the upcoming year.

While many of our members have faced challenges, the level of support for our congregation has remained high. We are hoping to build on the successes of our pledge campaign last year, where we saw an increase in the number of pledges and an increase in the dollar amount pledged. Our pledge goal for the upcoming year is \$300,000, which is a significant increase from the pledge total of \$266,000 for the current year.

Our ministry is everything that we do together. Sometimes it is easy to overlook how much work by staff and volunteers is going on "behind the scenes" to maintain and adapt the infrastructure that supports our mission. We have been re-inventing our community in many positive ways so that we can continue to live our values together. Our weekly worship gatherings touch many lives and maintains strong connections. The breadth of our programs and community outreach has meaningful effects.

Your pledge form is on the back of this letter. We would appreciate if you can return it by April 15, 2021, by mail, or email a copy to financeteam@uusantafe.org or complete it online at <https://uusantafe.breezechms.com/form/ab0680766>.

With optimism and hope, your 2021-2022 Pledge Team, Roberta Armstrong, Gregory Berg, Brent Farler & Mary Beth Kuderik.

P.S. The Board and Minister's Message enclosed will tell you more, and our website members only page (www.uusantafe.org/membersonly) provides additional information.

Appendix G: Pledge Thank You Letter



Unitarian Universalists of Santa Fe
P.O. Box 4637, Santa Fe, NM 87504 Phone: 505.982.9674

Nurturing hearts and minds, practicing beloved community and working for justice

March 10, 2022

<Addressee and address>

Dear <first name(s)>,

Thank you very much for your pledge of \$<amount> to Unitarian Universalist of Santa Fe for the year beginning July 1, 2022. Your support, both financial and volunteer, builds the foundation that makes everything we do possible. Like last year, your pledge is particularly important because the pandemic continues to challenge our community—both members and the community at large. <Evergreen language inserted as appropriate, manual edits>

Amid uncertainty, our mission and community continue, albeit in new ways. Most of our groups have found ways to connect through Zoom, Facebook and the old-fashioned telephone. The year ahead will continue to present opportunities and challenges for all of us, and we welcome your suggestions, questions and ideas. We hope to begin to gradually reopen the campus to small groups and worship services; our announcements on the website and in the *Weekly* will keep you up to date. Please feel free to contact members of your Finance Committee or any of your board members.

Back to business as usual, you will receive periodic statements from the church office showing your contributions. If paying by check or bank bill payment service, please make sure your name and “pledge 2022-2023” are on the check. This really helps us with the bookkeeping! You can also use the website Donate button (although that option costs us about 3%).

Thank you again for your support of UU Santa Fe. We hope to see you in person soon!

If you have any questions, please email us at financeteam@uusantafe.org or give me a call.

Sincerely,

Jack Seigel
Vice President for Finance
505.471.3931

Enclosure: Frequently Asked Questions about UU Santa Fe Pledges and Finances

Appendix H: Frequently Asked Questions about UU Santa Fe Pledges and Finances (2 pages)

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February 2022

What are the financial resources of UU Santa Fe and how does it prepare a budget?

The annual budget of UU Santa Fe is reaching \$350,000. This amount covers most, if not all, of our basic operating requirements, including staff, utilities, general maintenance of facilities and program. Pledges cover 75%-80% of that amount. The remainder is paid through fundraisers, offertory, facility usage fees and sometimes grants.

We have an endowment fund invested with the UUA common endowment fund that is nearing \$500,000. Depending on performance, the PEF will contribute up to 8% of its balance each year to social justice (25%), capital needs (35%) and board designated use (40%).

The largest asset that UU Santa Fe holds is the building and land. Fortunately, we do not carry any debt on the building; however, maintenance and capital improvements are necessary on a regular basis. Our cash assets are invested through the UUA Common Endowment Fund, which invests our funds professionally consistent with our values and performs in the upper quartile of similar funds. Despite the pandemic our liquidity remains very strong.

Can I make an automatic payment each month directly from my bank account?

Yes, the best way to pay automatically is through your bank's "bill payer" program. You can set up the transaction by making UU Santa Fe a "payee." If you choose to make the payment "recurring," you will be able to set the amount of each payment, the number of equal payments, the date you want the bank to send the money and a memo indicating the purpose of the payment (e.g., 2022-2023 pledge). While you will want to monitor your account and check your statements, the process of "automatic payment" will require about 10 minutes of your time once a year. If you do not have an on-line banking account and want one for its convenience, speak with customer service at your banking institution. The bank will help you with set up and you don't need to be a tech guru to use this application. *There is no charge to you or UU Santa Fe for using this option.*

Can I make automatic payments with my credit card?

Yes, UU Santa Fe will accept payments made through our website (see the PayPal donate button at the bottom of the home page). You may make a payment for the Sunday offering/livestream service, your annual pledge (one-time or recurring payments), the Permanent Endowment Fund (endowment), the Minister's Emergency Fund (crisis support) or a general, undesignated gift. *You have the option to add an amount to your online payment to cover the credit card processing fee.*

I must make a minimum withdrawal from my IRA; can I donate the required withdrawal and not pay the deferred tax?

If you have a classic, qualifying tax deferred IRA and must take a required minimum distribution, you may donate that distribution (or a portion thereof) to UU Santa Fe or other charity without paying income tax on that distribution. You may not do this with 401K and 403B accounts where employer monies are comingled. Always make sure to alert the UU Santa Fe office, bookkeeper@uusantafe.org, of any transaction coming from a broker ensure that we know to whom to credit the donation...and what pledge year.

What is the "EverGREEN Pledge" and what are its benefits?

The *EverGREEN* pledge is a promise to continue any regular donation at the same level (or with an inflationary increase) each year. This benefits UU Santa Fe as it increases the confidence in our revenue stream and lessens the need to chase down pledge renewals. Everything stays "green" because the funds do not dry up. If you choose this option, we will contact you each year to confirm your decision. Also remember that you can change your pledge (up or down) at any time, and we will ask you to review your *EverGREEN* Pledge each year.

Can I donate a car, real estate, stocks or other personal property to UU Santa Fe?

Appreciated assets or assets that no longer have value to you can be a tax efficient manner to make contributions. UU Santa Fe's policy is to sell stock as soon as received (and reinvest per policy). Other assets require board approval before being accepted to ensure that UU Santa Fe can manage/sell the asset without undue burden or risk. If you wish to donate stock, please ask the office for the most recent instructions. It is critical for both UUA and UU Santa Fe to know that a stock transfer is coming, otherwise it is unattributed and may be returned.

What is "planned giving"?

Generally, it refers to the plans we can make in our wills and/or beneficiary designations in IRAs and other related assets. There is no minimum amount (or maximum) and usually the amount distributed is dependent upon what remains in an estate. In other words, if health care or living expenses deplete the expected assets, there is less to give. Consult your tax advisor or attorney to discuss your options.

When will I get information on my giving?

Pledge status statements are sent in April, June and December; a statement of tax-deductible giving for the previous calendar year is sent in late January to assist in tax preparation.

Questions? financeteam@uusantafe.org or call.

Jack Seigel
Vice President for Finance
505.471.3931