



Unitarian Universalists of Santa Fe

PLEDGE DRIVE 2024-2025

Final Report

August 24, 2024

Roberta Armstrong

Rev. Gail Marriner

Mary Beth Kuderik, Vice President for Finance, *ex officio*

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Executive Summary

The results for the 2023-2024 year were disappointing.

1. We missed our target by \$82,592.
2. The dollar amount pledged decreased by 3.8% over the prior year.
3. The number of pledges decreased by 2.4%.
4. About a 51% of this year's pledgers increased their pledges; last year 59% increased their pledges.
5. We have now received lower pledge amounts for two years; in both years inflation has run about 4%.

The 2023-2024 pledge drive goal was to raise a total of \$354,000, a target \$29,000 greater than the previous year's pledge goal and \$72,000 greater than the previous year's pledges received.. While the goal represented actual needs and was well documented, the pledging community didn't respond. The actual pledge total of \$271,408 as of July 15, 2024 represents 77% of the pledge goal compared to 95.2% for 2022-2023 and 87% for 2023-2024.

\$275,000 of projected pledge income was included in the 2024-2025 revenue budget, representing about 75% of the total revenue budget of \$399,700 that was approved by the Community at the June 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 2023-2024, 29 pledges (17%) represent 50% of the amount pledged.

Of significant concern is the fact that 20 people who pledged in 2023-2024 did not pledge this time; their previous pledges totalled about \$31,000. About half of this group resigned or moved during the year which is typical. Further, 34 of our current members did not pledge in either 2023-2024 or 2024-25. Discussion of these issues is underway.

We owe thanks to many for their support of this campaign: Those making testimonials and the many pledgers. And, of course, for the ongoing support of VP for Finance Mary Beth Kuderik and bookkeeper Mary Kreutz. Other factors include excellent data management and follow-up.

Overall, the 2023-2024 pledge campaign yielded a positive result, but didn't meet its challenging goal. The Team recommends that a Stewardship Committee be appointed immediately to develop options for considering options to improve communication with the Community on financial matters and increase our giving levels to meet our needs.

Purpose of this Report

This report will (a) summarize the work of the 2024-2025 Pledge Committee, and (b) provide guidance to persons who serve on future pledge teams. Many documents in the Appendices and in the Google Workspace shared drive “Pledge Team” can be re-used by the next pledge team.

Results of 2024-2025 Pledge Drive

The pledge information reported here includes pledges received through July 15, 2024, as recorded in Breeze.

The results for the 2024-2025 year were disappointing:

1. We missed our very ambitious target of \$354,000 by \$82,592.
2. The dollar amount pledged, \$271,408, was a 3.8% decrease over the prior year.
3. The number of pledges fell by 2.4%.
4. About 51% of pledgers increased their pledges this year compared to about a third last year.
5. We have now received lower pledge amounts for two years; in both years inflation has run about 4%.

The 2024-2025 pledge drive goal was to raise a total of \$354,000, a target \$72,000 greater than the previous year’s pledges received. The actual pledge total of \$271,408 as of July 15, 2024, represents 67.7% of the pledge goal. \$275,000 of projected pledge income was included in the 2024-2025 revenue budget, representing about 69% of the revenue budget of \$391,547 that was approved by the Community at the June Annual Meeting.

Of significant concern is the fact that 20 people who pledged in 2023-2024 did not pledge this time; their previous pledges totalled about \$31,000. About half of this group resigned or moved during the year which is typical. Further, 34 of our current members did not pledge in either 2023-2024 or 2024-25. Discussion of these issues is underway.

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

We added 8 new pledging units for 2024-2025; pledges totalling \$9,860 were received from this group.

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 2024-2025, 25 pledges (15% of the total number) represent 46% of the amount pledged.

Table 1. Distribution of 2024-2025 Pledges by Amount Pledged

Pledge Amount	No. Pledges	Total Contributed	Percent of Total	Cumulative Percent of Total
\$1-100	9	\$664	0.2%	0.2%
\$101-500	39	\$13,470	5.0%	5.2%
\$501-1,000	34	\$28,115	10.4%	15.6%
\$1,001-1,500	24	\$30,206	11.1%	26.7%
\$1,501-2,000	13	\$22,922	8.4%	35.1%
\$2,001-3,000	20	\$51,014	18.8%	53.9%
\$3,001-4,000	8	\$28,620	10.5%	64.5%
\$4,001-5,000	8	\$36,716	13.5%	78.0%
\$5,001-10,000	9	\$59,681	22.0%	100.0%
	164	\$271,408	100.0%	

The table below shows summary pledge statistics by year.

Table 2. Summary Pledge Statistics by Year

	2014-2015	2015-2016	2016-2017	2017-2018	2018-2019	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024	2024-2025
Total \$K Pledged	\$286.5	\$291.9	\$271.1	\$251.2	\$251.1	\$249.0	\$249.1	\$266.2	\$285.6	\$282.1	\$271.4
No. of Pledges	177	171	168	165	149	153	148	166	171	168	164
Mean Pledge	\$1,619	\$1,835	\$1,741	\$1,530	\$1,684	\$1,628	\$1,683	\$1,604	\$1,670	\$1,679	\$1,655
Median Pledge	\$1,020	\$1,200	\$1,025	\$1,000	\$1,060	\$1,000	\$1,200	\$1,145	\$1,200	\$1,000	\$1,010
Pledges ≤\$100	5	3	6	8	5	5	8	4	5	9	9
Percent Change in Amount	-7.30%	6.30%	-9.70%	-9.30%	-0.10%	-0.01%	0.00%	6.86%	7.29%	-1.00%	-3.80%
Percent Change in # Pledges	-5.90%	-6.20%	-5.40%	-1.80%	-9.70%	3.00%	-3.00%	12.16%	3.01%	-1.75%	-2.38%

Process, Timing and Work Steps

This pledge drive took place after the COVID-19 pandemic when we had returned to in-person gatherings.

A Pledge Team did not begin work until January 2024. Roberta Armstrong and Rev. Gail Marriner comprised the team with early assistance from Jean Brophy; Mary Beth Kuderik, Vice President for Finance, was an *ex officio* member. The Team communicated frequently in person, via phone and via email. During the same period, The Board and Vice President Kuderik were working on the proposed budget.

A pledge goal of \$354,000, substantially more than the 2023-2024, goal was established. We recognized this was an extremely challenging goal, but it was what was required to support the proposed budget, which included a 4.3% COLA for staff, a continuation of the Program Ministry 75 percent time position, inflationary increases and an enhanced facilities budget to cover security related items. The Team 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 adopted “Visioning the Future—Together with Love” as a theme this year, choosing to link with the long-range planning process that was occurring under Board direction. We didn’t use videos this year, opting for in-person testimonials.

The campaign officially began on March 10, 2024, and ended officially on April 14, 2024, 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
- A mailing of the Board President-Minister letter before the official launch date. That letter (Appendix A) provided an excellent explanation of our current budget situation. It was hoped that a separate mailing would be more likely to be read as a separate item rather than included with the ask letter and pledge form.
- Pre-campaign solicitation of Board and Program Council members on February 27, 2024 via email.
- Distribution of pledge packets at church on March 11 and mailing those not picked up on March 11, 2024. These included the ask letter and a personalized pledge form (Appendix B has a sample blank pledge form).
- Presenting five testimonials during worship services.
 - March 10, 2024—Roberta Armstrong?
 - March 17, 2024—Thim Maciula and Fish Greenfield
 - March 24, 2024—Dierk Haskin
 - March 31, 2023—Mary Ellen Gonzales
 - April 7, 2023—Mike Owens
- Frequent updates via the website, *UU Santa Fe Weekly* and weekly livestream service
- Personal thank-you letters for every pledge
- Sending a general email campaign update and reminder on April 10, 2024, to the 180 Members and Friends who had not yet responded.
- Extensive follow-up by email and telephone for those who hadn’t pledged yet during April, May and early June.

- In mid-April a follow-up email was sent to the 48 individuals who had pledged the previous year but not yet for this one. A copy of their pledge packet was attached. 22 of this group submitted pledges during the follow-up period.
- Beginning May 1, we telephoned the 26 individuals who had pledged the previous year but not this one. Callers were Roberta Armstrong, Rev. Gail Marriner, Holly Kinley and Catherine Salveson. Pledges were received from 14 of the 26, and a several status changes (e.g., moves, resignations) were made.

This year's pledge form was like last year's, and a Breeze online pledge form was also created and used for those who preferred that option and to include in follow-up emails.

Three different personalized letters and pledge forms were produced:

- Letter 1—to Board and Program Council members (Appendix C)
- Letter 2—to 2023-2024 Pledging Members and Friends (Appendix D)
- Letter 3—to Friends and Members who didn't pledge in 2023-2024 (Appendix E)

The pledge drive ended officially on April 14 with 134 pledges received; following that we initiated telephone, email and in-person follow-up activities with the individuals on our original list who hadn't pledged yet. 30 pledges totalling \$38,784 came in from April 20 to July 15.

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

Recommendations for Next Pledge Drive

Given the results of the 2024-2025 campaign significant changes need to be made to develop a culture of generosity and overall higher pledge levels. The suggestions that follow are in no particular order, although the first three are very important to the success of any campaign.

- A critical first step is the creation of a Stewardship Committee which would consider the larger issues, establish the annual pledge committee in early fall, coordination of all fundraisers, work with the Board, etc.
- Work with Community Life and the Minister to determine options that could increase both the pledge amount and number of pledgers. This group could also address the issue of the members who have not pledged for the last 2 years and those who did not continue their 2024-2024 pledge.

- Set a goal that represents what UU Santa Fe needs and is viewed as achievable.
 - Use a similar schedule, March-April, as was used for 2023-2024.
 - Increase the size of the Pledge Team. It should include a subset of the Finance Team plus two to three others to help with communications and follow-up.
-
- Develop and work to a comprehensive project plan and document activities completely.
 - Continue to use the Google Shared Drive as a location for storage of pledge documents.
 - Continue to do a solicitation of Board and Program Council members about a month before 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
 - Use selected one-on-one interactions—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. Or consider events in members' home to discuss the campaign, accept pledges and enjoy each other's company.
 - Continue to encourage use of the online pledge form; we received 58 of these forms through June, including those created by those 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 but 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)



Unitarian Universalists of Santa Fe

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

Visioning Our Future—Together with Love

Dear Friends,

It is that time of year again— the annual Pledge Drive!

We are so grateful for your financial contributions, and equally thankful to each of you for your contributions of time and talent. By contributing in this manner, you make UU Santa Fe a thriving congregation. Your commitment to nurturing our community enables us to serve each other, our larger community and the visitors that seek us out. Again, thank you.

Because of your generosity we can say:

- UU Santa Fe is financially stable because of your pledges each year; the vision and generosity of those who set up and contributed to the Permanent Endowment Fund; the income received from our many rentals; and the careful stewardship of our shared resources.
- We have a healthy attendance for Sunday worship services, both in person and on YouTube, thanks to the dedicated members who provide the technical support each week, and the creativity of the Worship team. We will continue to offer all services in a hybrid format.
- Programing remains vibrant under the guidance of Teresa Tunick (Vice President for Program) and Rev. Kimi Floyd Reisch (Program Ministry Director). The Neighborhood Groups and Covenant Groups have kept our community knitted together, and the Justice Council is helping us live into our values with community partnerships including our relationships with Esperanza, Adelante and the NAACP.

We have listened carefully to your thoughts and comments through the survey, town hall and feedback sessions and we take your feedback seriously. We are committed to maintaining our facility, supporting our staff and growing our programs in ways that align with the vision emerging from the long-range planning process.

This year the Board set a pledge goal of \$354,000. This is a significant jump from last year's ask of \$310,000 and an even larger jump from the \$287,000 that we raised in last year's canvass and supplemented from our dwindling reserve fund. Such a jump is necessary if we are to maintain our building, support our programs, treat our staff fairly and act on our dreams. That said most of our budget goes to support our small but talented staff.

And who are our staff members? **Aaron Leventman** and **Mary Kreutz** work with volunteers to manage the office, the building and our finances. **Pete Vogel** has been working with the Facilities Team to keep our building in shape for years—he knows every inch of our campus. **Rev. Kimi Floyd Reisch** works with the many programs offered through the Program Council including worship, membership, lifelong learning and justice, as well as providing invaluable assistance with our website and newsletter. All of these things help put our values into action with opportunities for learning, action, and caring. This year, **Lydia Madrick**, our Music Director and primary keyboardist, will be celebrating her 30th anniversary of providing music for our community. Her skill and her community connections are invaluable.

Rev. Gail Marriner is central to our team. She supervises staff, works with the Board of Trustees, the Program Council and the Operations Council, leads the Worship Team and our worship services, tag teams with Membership, Hospitality and Bridges, provides pastoral care, memorial services and weddings, participates with interfaith and community allies in the larger Santa Fe community, and endeavors to be a calm, sane and welcoming presence in our midst.

As our called minister Rev. Gail is full-time, Rev. Kimi three-quarters time, Aaron and Mary half-time and Lydia and Pete 20%-time employees.

This level of staffing is at the UUA-recommended level for a congregation of our size. The Pledge Goal this year includes a cost-of-living adjustment to keep staff compensation in line with UUA guidelines for living wages here in Santa Fe. We practice our UU values when we honor the inherent worth and dignity of our staff by compensating them fairly.

We can do this. Consider our shared UU values and how important they are in these challenging times. Think about all the ways that UU Santa Fe enriches your life: the programs, the ideas, the potlucks, the justice opportunities, the encouragement and support, the friends and co-conspirators you have found here. These things are worth supporting.

As we write this, UU Santa Fe membership, attendance, programs and staffing are all strong and healthy. We are living out our UU values and working to make Santa Fe and New Mexico happier, healthier places. We need your support to keep moving forward. Your annual pledge tells us you are still part of UU Santa Fe. Please confirm your continued enthusiasm for our community by filling out your pledge form and returning it promptly. We trust you will pledge as generously as you are able. Please know that everything you give will be gratefully received and wisely spent.

Laura Brockington,
President UU Santa Fe Board of Trustees

Rev. Gail Marriner,
Senior Minister

Appendix B: 2024-2025 Pledge Form



UU Santa Fe 2024-2025 Pledge Form
(For fiscal year July 1, 2024-June 30, 2025)
Visioning Our Future—Together with Love

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

Date: _____

Your contact information:

Name(s): _____

Address: _____

Mobile Phone: _____ Home Phone: _____

Best Email: _____

My/Our 2024-2025 pledge (total amount from July 1, 2024 to June 30, 2025)

\$ _____

How do you plan to make payments on your pledge?

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

Comments or questions? Let us know and we'll give you a call!

UU Santa Fe Use (Enter date/initials)

_____ Received _____ Stewardship File _____ Breeze _____ Thank You

Appendix C: 2024-2025 Letter to Board and Program Council Members



Unitarian Universalists of Santa Fe

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

Visioning Our Future—Together with Love

February 27, 2024

Addressee

Salutation

We are writing to you as a member of our leadership team to launch our annual pledge campaign for July 2024-June 2025. Your early response will kickstart the campaign which begins March 10.

During the past few months, we have heard from many of you through the Engagement Survey, Town Hall and Listening Sessions. We've heard that UU Santa Fe is very important in your life, and that you want the congregation to continue to be the same in many ways and expand in others.

We hope you are as proud of what we do in the community as we are. We host 22 recovery groups each week, provide space for community outreach and events from the Upstart Crows to the Esperanza craft sale to fundraisers to concerts and lectures. And that doesn't even include the groups we host online. Participation in the pledge campaign is key to expanding our impact on the broader community and living our UU values to the fullest.

Your participation is vital for this work. In order to meet inflation and ensure our staff salaries and benefits are in line with UUA guidelines, our pledge goal needs to increase this year by about 8%. It will take all of us to meet that goal.

As UU Santa Fe approaches its 75th year, the future of our congregation rests with us.

Your pledge form is on the back of this letter. We would appreciate if you can return it by April 14, 2024 by mail, or email a copy to financeteam@uusantafe.org or complete it online at <https://uusantafe.breezechms.com/form/2024-2025PledgeForm>.

With grateful thanks,

Your 2024-2025 Pledge Team—Roberta Armstrong, Jean Brophy and Rev. Gail Marriner

Appendix D: 2024-2025 Pledging Members and Friends 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 12, 2023

Addressee

Salutation,

We are writing to you as a current financial supporter of UU Santa Fe to launch our annual pledge campaign for July 2023-June 2024. Your pledge this year is very much appreciated, and your response to this campaign will help us develop our final budget for approval at the May Annual Meeting. While there are concerns about the economy, UU Santa Fe is a healthy congregation!

- We are a healthy place thanks to your generous pledges this year, your contributions during the fall appeal, and a generous distribution from the Permanent Endowment Fund to support program activities.
- We remained committed to continuing our strong hybrid programming and Sunday services and encouraging masks as long as needed. We see increasing attendance for the Sunday worship services, both in person and on YouTube.
- Programing has become more active with the guidance of Kimi Floyd Reisch and Laura Brockington leading the Program Council. Neighborhood and Covenant Groups have kept our community knitted together.
- Solar is installed and is making a difference in our utility bills and protecting our environment. We will be applying your contributions to make our lease payments.
- Fundraising this year has been profitable and fun, and our rentals have returned to pre-pandemic levels.

While the news is mostly positive, the 2023-2024 budget is challenging:

- A significant portion of our funds come from the generosity of our members and friends with the balance coming from endowment disbursements, rentals and fundraising.
- Because of 2022 market returns, there will be no distribution from our Permanent Endowment Fund in the coming year which we have used in the past to fund program and capital costs.
- As with everyone, we have incurred inflationary increases in our costs for insurance, supplies and food for our potlucks.
- The Board is committed to keeping staffing at our current level and providing cost-of-living increases if possible.

The level of support from our congregation has remained high. In 2022-2023 we saw an increase in the number of pledges and in the dollar amount pledged. Our pledge goal for the upcoming year is \$325,000, an 8.3% increase from the \$300,000 pledge goal for the current year.

Your pledge form is on the back of this letter. We would appreciate if you can return it by April 15, 2023 by mail, or email a copy to financeteam@uusantafe.org or complete it online at <https://uusantafe.breezechms.com/form/2023-2024PledgeForm>.

With grateful thanks, your 2023-2024 Pledge Team, Roberta Armstrong, 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 about the upcoming campaign.

Appendix E: Letter to Friends and Members who didn't pledge in 2023-2024 (2 pages)



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

Visioning Our Future—Together with Love

March 10, 2024

Dear Member or Friend of UU Santa Fe.

During the past few months, we have heard from many of you through the Engagement Survey, Town Hall and Listening Sessions. We've heard that UU Santa Fe is very important in your life, and that you want our community to maintain, improve and expand our facilities and programs, our outreach and impact.

Every year the Board of Trustees reviews our needs and finances and sets the goal for our annual pledge drive. Last year's goal was \$310,000 and we raised \$287,000 in pledges (92% of the goal) and were able to make up the difference with reserve funds. Those funds are now largely depleted. The Board met on February 26 to discuss the proposed 2024-2025 budget; the notes below summarize their discussion:

- Our pledge activity has not kept up with the operating needs of the organization driven by the following: staff pay increases and mandatory retirement contributions, minimum needed repairs/maintenance on an aging building and general inflation.
- While we have been able to offset some of this divergence through expansion of our group and special event rentals, this has not been enough to keep pace with the growth. In addition, our offertory experience is down about 20% from the prior year.
- Because of the above, our 2023-2024 FY budget was proposed with a deficit of \$7,900 but based on our current expectations the actual deficit will be just under \$23,000. Without a substantive growth in pledge receipts, we will face an even greater budget deficit for FY 2024-2025.
- The initial draft of the FY 2024-2025 budget provides a 4.5% inflation adjustment for staff, covers anticipated /realistic maintenance and landscaping improvements, costs for two landmark events, including our 75th anniversary, and general carryover for other areas of spending.
- At this time and given the expected higher deficit for FY 2023-2024, the Board did not feel comfortable proposing a deficit budget. As such, the required pledge request is to achieve \$354,000. Owing to the pressure on our operating cash reserves from a deficit budget, we will likely be looking at cuts/adjustments should we not achieve this amount.
- Owing to our operating cash reserves of ~4 months free cash, we are not in immediate crisis; however, with pledge levels at or with a slight increase from 2023-2024 we will draw likely this down to about 2 months operating reserves by the end of FY 2024-2025. Such a low cash reserve creates much greater risk to on-going fiscal management and would not be sustainable beyond that fiscal year. It would most certainly leave the FY 2025-2026 budget in an extreme position.

The Board recognized we could not just ask for a percent increase from the members who do pledge and that we need to achieve a greater level of pledges from those who have not pledged in the past. The average pledge needed from each of our members and friends to achieve the \$354,000 is more than \$1,400 annually. Taking all that information into consideration, this year our pledge goal is \$354,000.00. It's a big, but necessary, jump from last year's goal if we are to be able to retain staff, maintain the building and begin to act on the dreams you are sharing with us. We are sometimes asked, "How much should I give." The answer is very personal; some congregations ask their members and friends to consider contributing between 3% and 6% of what they take home each month.

We know you care about this community. We see that care in the many ways you show up and help make things happen here. We hear it in feedback that you give. But we don't know your financial situation or what you can afford to contribute. So, we want to ask you a question: How would your life be different without UU Santa Fe? What if the classes and worship, advocacy opportunities, and social events, all the music, all the connections and ideas, the wonderful conversations and the friendships that happen here were gone? How would your life be different?

For nearly 75 years Unitarian Universalist's in Santa Fe have decided that this community was worth supporting and we have benefited from their generosity. What is UU Santa Fe worth to you? We trust you will pledge generously so our community will continue to thrive.

Your pledge form is enclosed. We have listed some percentage increase ideas for your consideration. They are only suggestions, and we hope you will give this year's pledge your most thoughtful consideration.

We would appreciate your returning your pledge by April 14, 2024 by mail, or email a copy to financeteam@uusantafe.org or complete it online at <https://uusantafe.breezechms.com/form/2024-2025PledgeForm>.

We will enter the names of everyone who returns their pledge form by the deadline in a drawing to receive a \$100 Visa gift card.

With grateful thanks,
Your 2024-2025 Pledge Team (Roberta Armstrong, Jean Brophy and Rev. Gail Marriner)

P.S. To learn more about the congregation's financial status see the Board [minutes](#) on the Members' page of the website; the minutes include the financial reports—
<https://www.uusantafe.org/membersonly.html>.

Appendix F: Pledge Thank You Letter



Unitarian Universalists of Santa Fe

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

Visioning the Future—Together with Love

May 17, 2024

Addressee

Dear Salutation,

Thank you very much for your pledge of \$XXX to Unitarian Universalists of Santa Fe for the year beginning July 1, 2024. Your support, both financial and volunteer, builds the foundation that makes everything we do possible.

Your pledge will help us meet our pledge goal of \$354,000 for the 2024-2025 year. This goal will help us provide cost of living adjustments for staff in line with UUA guidelines and provide increased support for our Operations and Program Councils, as well as the Neighborhood and Covenant Groups that keep our community knitted together.

Please feel free to contact me or any of your board members if you have questions.

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 2024-2025" are on the check. This really helps us with the bookkeeping! You can also use the website Donate button.

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 Roberta a call.

Sincerely,

Roberta Armstrong (505.670.4683)
For the 2024-2025 Pledge Team

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

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

| Frequently Asked Questions about UU Santa Fe Pledges and Finances

March 2024

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

The annual budget of UU Santa Fe is about \$478,000. This amount funds our staffing and covers most, if not all, of our basic operating requirements, including worship activities, facilities maintenance and programs. 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 valued at about \$417,000. 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%). For 2024-2025 the fund will disburse \$23,249: \$5,857 for Justice Council activities, \$8,200 for [facilities](#) needs, and \$9,371 to be allocated at the Board's discretion.

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 and funds held for specific projects are invested in bank cash savings accounts and short-term U.S. Treasury money market funds. Our cash operating reserve and liquidity is sufficient to meet our current needs.

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., 2024-2025 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 donate button at the top right 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 of approximately 3%.*

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

If you are age 70 ½ or greater and 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 to ensure that we know to whom to credit the donation...and what pledge 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, insurance policies 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.

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