

First Unitarian Church of Cincinnati Annual Financial Pledge Canvass Report May 1, 2017

Lisa Davis Roberts, Ray Sinclair, and Carrie Spiess

Overview

The annual canvass campaign for the 2017-18 fiscal year was themed, *We are The Ones We Have Been Waiting For*. It was conducted during the months of March and April, 2017. The goal for the campaign was \$386,225. As of the date of this report, with 160 pledge units pledging, \$379,563 in pledges has been received or 98% of the goal. When all pledges are in (no estimate of when that will be), we expect to come within a few thousand dollars of the goal.

Below, four figures summarize our analysis of giving patterns. After that we list a few comments about our activities and some suggestions for next year.

Giving Patterns

Figure 1 shows that the congregation has significantly increased its giving to the church. This year, there are about one quarter more pledging units (160 so far) than there were in 2012 (129), the average pledge is up by 10% and the total of all pledges is up by more than one third since the 2012 campaign.

Figure 2 shows that nearly half of the total dollar amount of this year's canvass was pledged by only 31% of the pledge units. There was a wide range in the size of these gifts, from \$300 per month to more than \$1000 per month. Conversely, the largest group of pledge units (44% of the total) pledged less than \$100 per month each or only about 11% of the total amount pledged in the campaign. Note that the distribution of pledges across these giving levels is similar to last year's distribution.

Figure 3 shows that more than half of the pledge units increased their 2016-17 pledge for the upcoming year. One quarter pledged at the same level, and the rest either were new, decreased their pledge, or did not pledge at all. We may still hear from some in that final status (no pledge). Note that the distribution across these giving trend categories is also similar to last year's distribution.

Although there were four fewer new pledge units this year compared to last year (11 vs. 15), they pledged at a significantly higher level, almost doubling last year's average for the group. This year the average new pledge was for \$1,115, while last year it was \$640. Note that both averages are substantially below their respective congregation averages of \$2372 and \$2213 (see Figure 1), but that is expected.

The distribution of last year's new pledgers into giving trend groups is also encouraging. Two thirds of last year's new pledgers pledged again this year. Of those, seven of ten increased their pledge, and the average increase was 10%. The other three submitted a flat pledge. However, we note that the remaining one third of the units did not pledge anything. We expect that giving trends of new pledgers will continue to be variable, but are pleased that those who are engaged are performing well.

Figure 4 shows that there was some tendency for pledge units to remain consistent in their giving pattern over the last three years. The graph shows four groups of bars. Each group depicts the distribution of a giving trend group for the fiscal year 2016-17 pledge as compared to 2015-16. For example, all the units in the right-most group decreased their pledge in 2016-17 from the previous year.

The bars within that “Decreasers 2017” group show what those same pledgers did for their 2017-18 pledge. Three decreased again, six were flat, five increased, and there were none who did not pledge. The tall gray bar in the “Increasesers 2017” group shows that fortunately, with some exceptions, our “increasers” keep increasing their pledges.

Comments

Although Lisa and Ray were the nominal leaders of this year’s canvass, it would not have happened without the assistance of Carrie who guided and encouraged them. Carrie contributed many hours to the canvass. She has comprehensive knowledge of our giving software. She coordinated other staff support. But most importantly, Carrie is the only individual who has an in-depth command of the giving **and** payment behavior of each pledge unit. Because of that, her frequent expert advice to the canvass team was invaluable. In addition, last year’s leaders, Dave Wallace and Jayson Zoller were more than generous in support, offering advice, and pitching in in numerous ways.

We also express our gratitude to Shelly Wallace and Rev. Maucere. They met individually with five of the highest-giving pledge units just before or during the canvass period. The purpose of these meetings was to thank these major givers and to solicit their views on the status and future of First Church. In the months ahead, we will evaluate the long range value of such meetings. We are also grateful to the entire Board of Trustees. Again this year, they agreed to send hand-written thank you cards to major givers. We intend to work with volunteers on the Board who will also offer oral personal thanks to as many as 30 major givers.

We also thank Jean Phillips and Kara Uhl who delivered personal testimonials about the value of First Church in their lives during the campaign. Kevin Pease designed and executed the campaign brochure and lobby signage. He also updated the pledge pages of the church website. His expertise and constant availability for consultation and assistance was essential to our operations. Susan West assisted the campaign by getting two different merge letters out to all the pledge units (canvass kickoff and pledge confirmation) and by placing copy in the newsletters and orders of service.

Our volunteer canvassers play a vital role in the campaign, contacting units whom we have not heard from beginning a couple of weeks into the campaign. This year’s canvassers were:

Alice Schneider, Beth Whelan, Carly Wise, Chris Dendy, Dave Wallace, Dick Miltner, Dennis Finney, Gary Gebhart, Laura Stanton, Fran Turner, Peggy Sandman, Jenny Krueger, Dot Christenson, Ed Rider, Jamie Moore, Sarah Estes, and Tim Christy. Tim, Laura, and Jamie were new canvassers. They performed as well as our crackerjack veterans.

Suggestions

1. Either this year or next year, the campaign should contact pledge units we have not reached after trying but who pledged last year, and communicate that the church assumes that they are willing to pledge again at last year’s level – an “opt-out” strategy rather than the current “opt-in.”
2. Next year, the campaign should use email for both the canvass kickoff letter and the pledge confirmation letter. Such a move would save staff time and money otherwise spent on postage and materials.
3. As soon as possible, the campaign should fully incorporate pledge payment behavior for each pledge unit into canvassing activities. By integrating this information, the campaign will be better-prepared to engage with each unit successfully.

4. We note that every pledge unit is different, and that knowing as many of those differences as possible may help future campaigns. Canvass leaders and workers should develop a robust method of keeping notes about each pledge unit and sharing that information with canvassers.
5. Canvass campaign best practices are improving across the UUA and all religious denominations. We also have substantial marketing and fundraising expertise in the congregation. It would benefit the church to organize occasional, informal brainstorming sessions to identify and prioritize further improvements to First Church canvass campaigns.

Figure 1

The Congregation is Growing More Generous.

Over 7 Years, the Canvass Total Increased 37%.
 The Average Pledge Amount Increased 10%.
 The Number of Pledge Units Increased 24%.

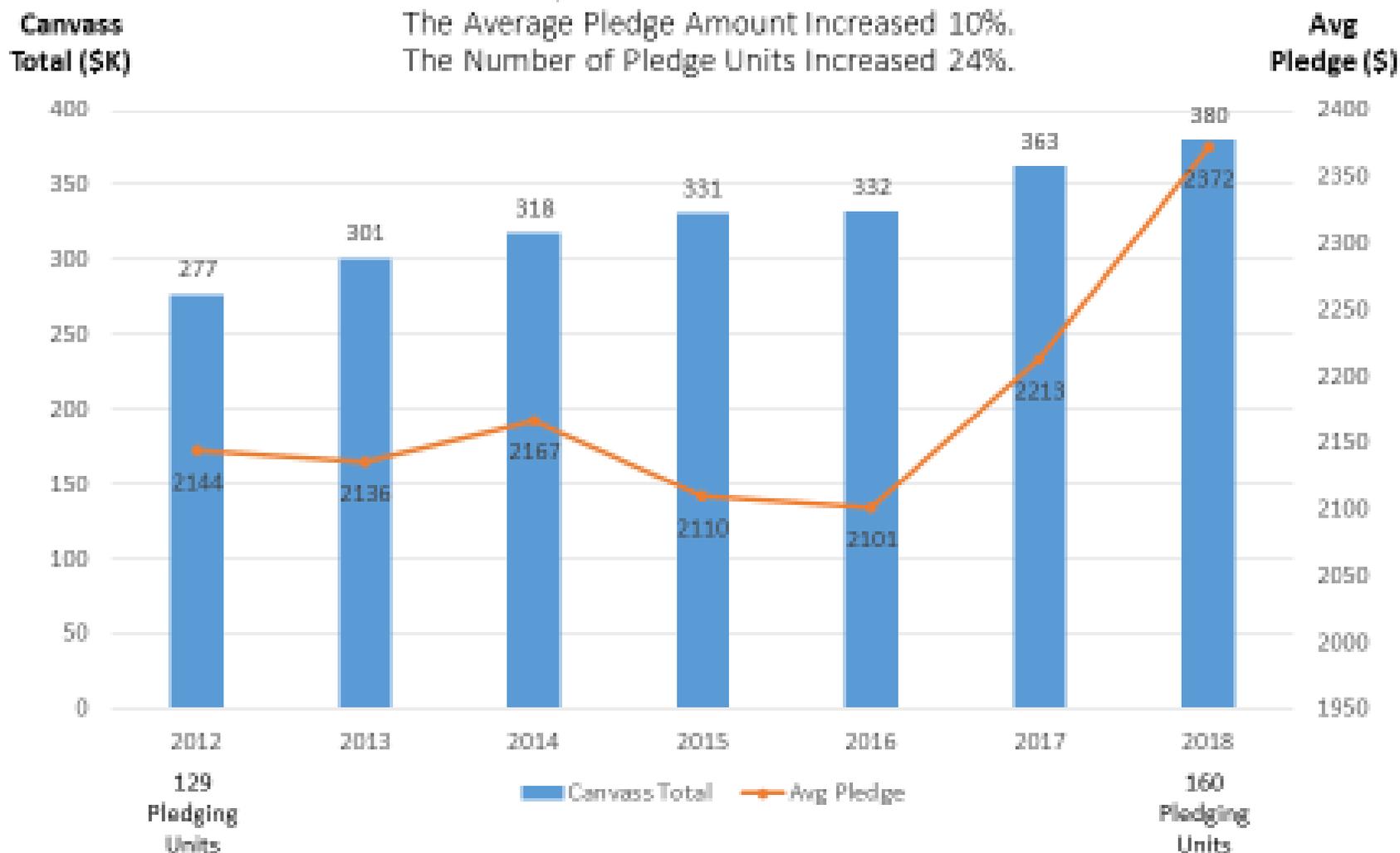


Figure 2

Top 31% of Pledge Units by Size of Pledge Account for 49% of the Pledge Total for 2018 Canvass.

(This is Not Unusual.)

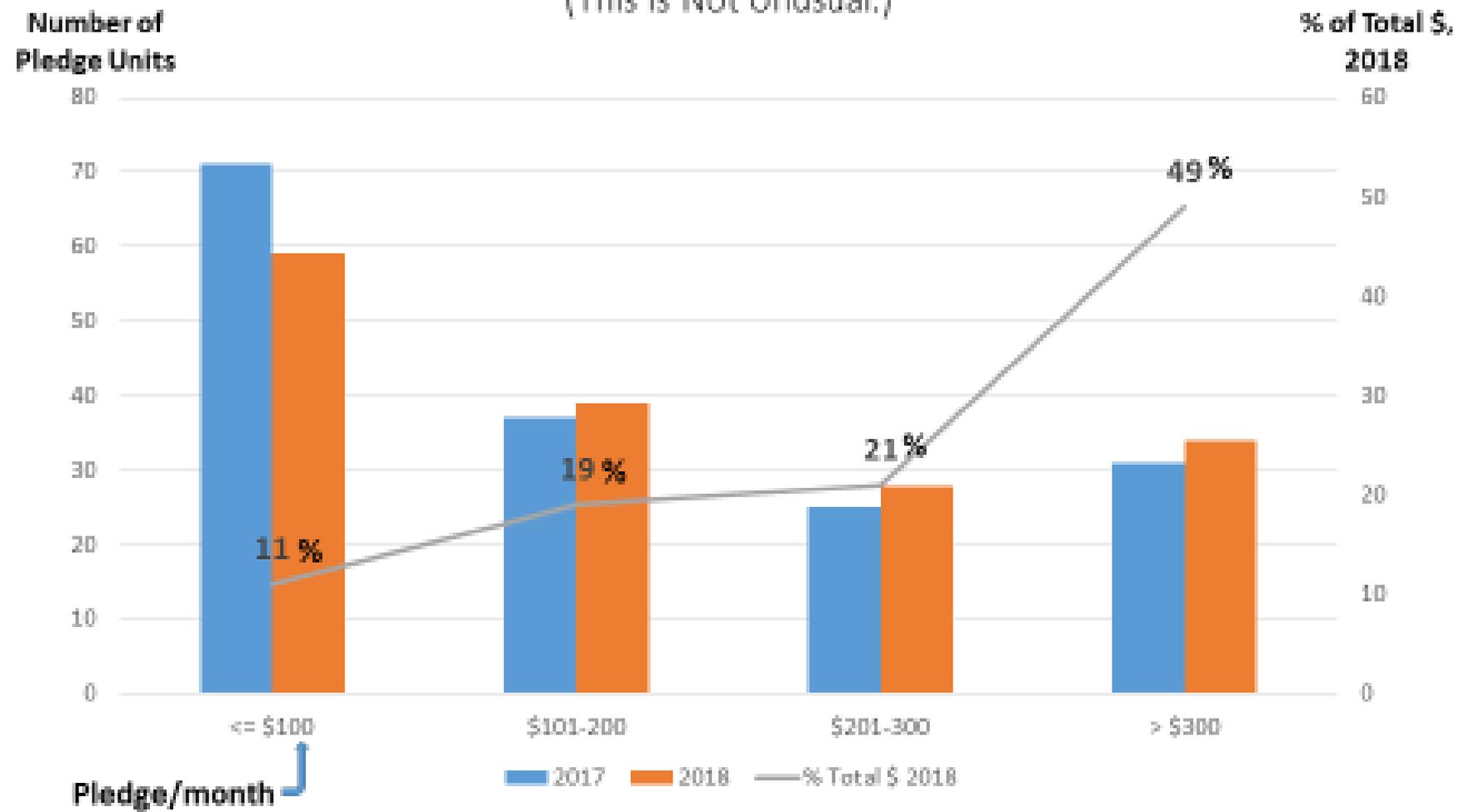


Figure 3

Like Last Year, Increasing Pledge Units Outnumber Decreasing Units by Almost 5 to 1.

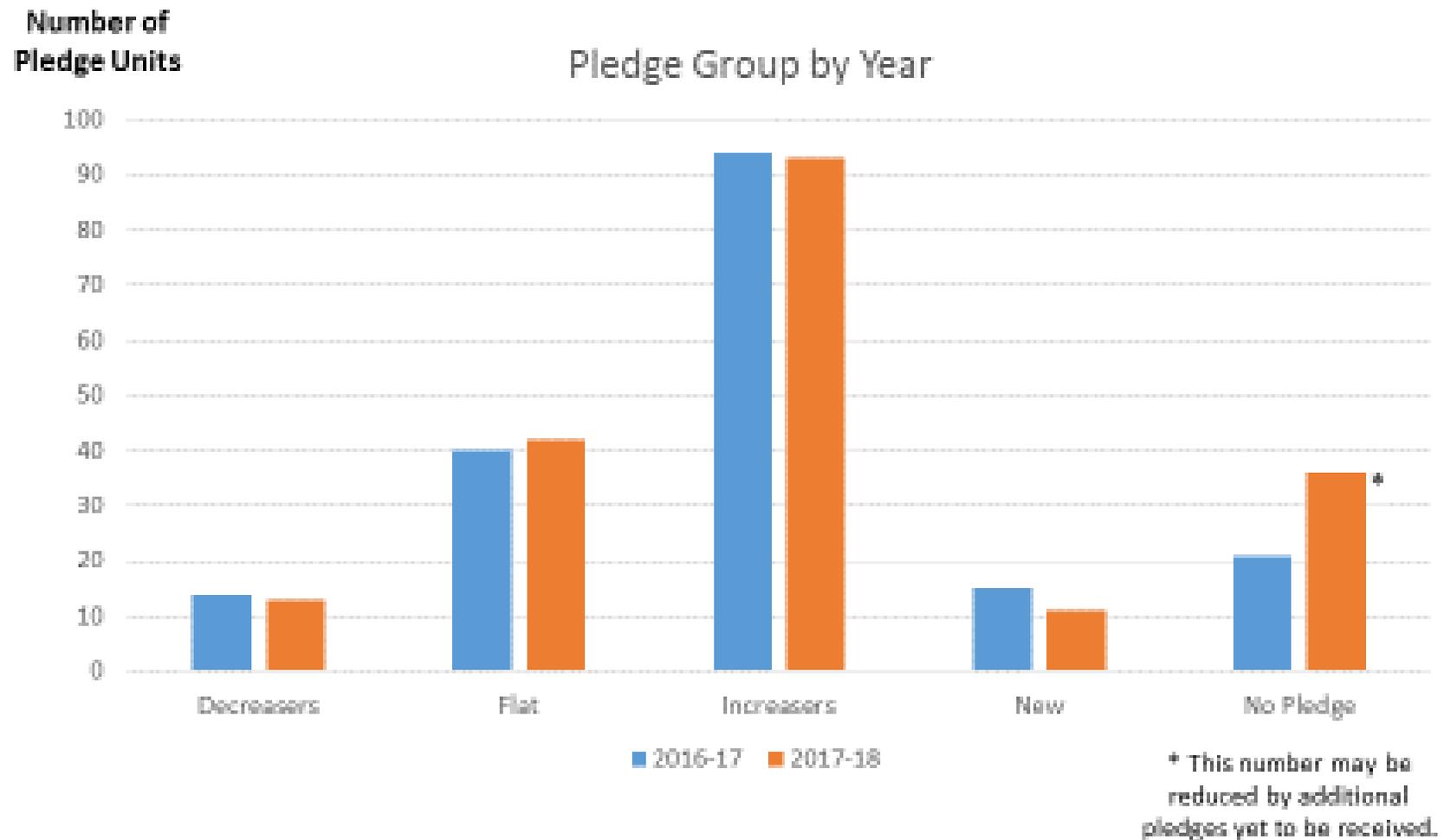


Figure 4

Pledge Units Tended to Stay in Their Giving Category from Last Year to This Year.
But There was Some Movement in Unpredictable Ways.

