

UUFC Annual Giving FAQs

What is the Annual Pledge Drive?

Each spring the UUFC asks its members and friends to make a commitment of financial support (a pledge) for the coming fiscal year (July 1 to June 30). Our Annual Pledge Drive provides the funds that make the life of our Fellowship possible.

Finances are important during the Annual Pledge Drive, but our real goal is to give everyone an opportunity to reconnect with the Fellowship and to reflect on:

- * what brings you here,
- * what keeps you coming back,
- * our personal and spiritual commitments to each other and to our world,
- * the fact that giving can be a spiritual practice.

What is a Pledge?

A pledge is a commitment to donate a certain amount of money to the Fellowship during the fiscal year. It is a statement of intent. It is not a legally binding obligation. Do not hesitate to pledge because you are uncertain about your financial situation. Pledges can be adjusted in times of shifting resources. We depend upon your pledges for the continued health and well-being of our Fellowship.

How is a Pledge Different Than a Contribution?

A pledge is a commitment for on-going support. On the other hand, a contribution is a gift that is appreciated and valued, but it is not something the Fellowship can count on into the future. We gratefully receive contributions to our general operating fund, building fund, endowment fund, or our monthly charity. Contributions may be mailed to the Fellowship or put into the Sunday collection basket. Make your check payable to UUFC and indicate if it is for the operating or another fund.

Is a Pledge Like a Membership Fee?

No. Many of us are members of organizations like Oregon Public Broadcasting where you are encouraged, but not required, to pay a membership fee. *The UUFC is different.* UUFC members and friends expect the Fellowship not only to provide worship and religious education for us and our families, but we also count on the Fellowship to be here for us in intensely personal ways: when we celebrate, when we grieve, when we work for justice. The Fellowship strives to be a community that supports us throughout our whole lives. In addition, we want the Fellowship to thrive and to continue to be a vital resource not only for ourselves, but for our communities, the world and the future. The Annual Pledge Drive is the time of year when we

each consider what financial support we can offer the Fellowship so that it is here when it is needed most.

Who Should Pledge?

Ideally, everyone! People who sign the membership book as well friends of the Fellowship are all invited to pledge. We know there are people among us who are hesitant, for whatever reason, to formally become a UUFC member, but have made a long-term commitment to the Fellowship. All are welcomed here. If you have found the worship services, religious education classes, the choir, your time making coffee or tending the grounds with others, Wednesday potlucks, social justice actions, or any other UUFC activity to be of meaning to you, make a pledge. This allows us to extend these same benefits to more people in our community and beyond.

Do I Have to Pledge?

Making and fulfilling an annual pledge deepens our faith and sustains the UUFC for the benefit of us all and the wider community we serve, but you are not required to make a pledge. That said, per current UUFC bylaws, you do not have to pledge to be a member. At the same time, the Fellowship depends upon pledges, so all are encouraged to make a pledge.

When Should I Make My Pledge?

During the Annual Pledge drive each spring, we ask our members and friends to renew their pledge of financial support to the Fellowship. This commitment supports our work and mission and allows us to set the budget for the operations of the Fellowship. We welcome your pledge at any time but pledging during the Annual Pledge Drive ensures the continued health and well-being of our congregation.

New members and friends who join us at other times of the year are invited to make a financial pledge for the remainder of the current fiscal year.

How Much Does It Cost to Run the Fellowship?

Our proposed annual budget for 2020-21 is ~\$462,000. **Pledges and operating fund gifts account for ~80% of our budget!** These funds pay for our staff (~75% of all expenses), cover utility and maintenance costs of our buildings (~ 8%) and provide for support of the rich array of services, programs and social outreach we offer (~17%). We have an exceptional staff! Your pledge monies are well invested in staff salaries and benefits.

How Much Should I Pledge?

Everyone’s circumstances are different. We recognize and deeply embrace the financial diversity of our congregation. To make this a Fellowship for all, we ask those who are able, to carry a greater financial commitment to our beloved community.

We ask all fellowship members and friends to pledge generously within their means. Or, as some have said, *“Give until it feels good.”* We each are asked to reflect on what that amount might be.

It might help individuals and families to know that in order to meet our 2020-21 fundraising goal of \$380,000 in pledges (\$40,000 less than in 2019-20), **we need an average pledge of \$1,450 per pledging unit (individual, couple or household making a pledge).**

We ask our members to consider pledging a percentage of their annual income. The UUA has developed a Fair Share Giving Guide (below), with 2% of annual income considered as a target for “fair share” giving. This is simply a guide – some of our members pledge at higher levels and others at lower levels, based on their capability. For those into numbers and details, see the pledging worksheet at the end of these FAQs for one approach to determining fair share.

FAIR SHARE GIVING GUIDE

Giving Guide							
Annual Income	Beginner		Supporter		Deepening		Visionary
	2%	5%	6%	7%	8%	10%	12%
\$10,000	\$200	\$500	\$600	\$700	\$800	\$1,000	\$1,200
\$20,000	\$400	\$1,000	\$1,200	\$1,400	\$1,600	\$2,000	\$2,400
\$30,000	\$600	\$1,500	\$1,800	\$2,100	\$2,400	\$3,000	\$3,600
\$40,000	\$800	\$2,000	\$2,400	\$2,800	\$3,200	\$4,000	\$4,800
\$50,000	\$1,000	\$2,500	\$3,000	\$3,500	\$4,000	\$5,000	\$6,000
\$60,000	\$1,000	\$2,500	\$3,000	\$3,500	\$4,000	\$5,000	\$6,000
\$75,000	\$1,500	\$3,750	\$4,500	\$5,250	\$6,000	\$7,500	\$9,000
\$100,000	\$2,000	\$5,000	\$6,000	\$7,000	\$8,000	\$10,000	\$12,000
\$150,000	\$3,000	\$7,500	\$9,000	\$10,500	\$12,000	\$15,000	\$18,000
\$200,000	\$4,000	\$10,000	\$12,000	\$14,000	\$16,000	\$20,000	\$24,000

Is There a Minimum Annual Pledge?

There is no minimum annual pledge; however, we pay annual “dues” to the national Unitarian Universalist Association (UUA) with some of these funds then going to the Pacific Northwest District. Payment amount is based on annual budget. Our payment in 2019-20 was \$32,000 or about \$125 per pledging unit in the UUFC (individual, couple or household making a pledge). The UUFC has been a UUA “Honor” congregation for more than ten years - <https://www.uua.org/finance/apf/honor-congregations> This means that we have given the full amount that the UUA has requested, based on our annual budget level, in each year.

Can I Pledge to a Specific Program or Fund Instead of to the Operating Fund?

All special designated gifts are certainly appreciated. But it is much more helpful to the Fellowship if pledges from our members and friends can go to our operating budget because that's what supports our programs from year-to-year. We need these funds to ensure that the Fellowship runs properly from all angles.

How Will My Pledge Be Used?

Pledges and gifts account for 80% of the Fellowship budget each year. Our annual budget for 2020-21 is just over short of \$462,000. These funds pay for our staff (~75% of all expenses), provide for all the utilities and maintenance of our buildings (~ 8%), and provide for support of the rich array of services, programs and social outreach we offer (~17%). We have an exceptional staff! Your pledge monies are well invested in staff salaries and benefits.

What Are My Payment Options?

ACH (Automated Clearing House) Payment - Our preferred method is to have your pledge automatically deducted from your checking or savings account. You can set this up online (or make changes to your current pledge payment account) [here](#). The Fellowship can set up an automatic payment for you as well. To have this done, download the authorization form on the Annual Pledge Drive page of our website (under the "Giving" tab) and mail it to the UUFC Business Manager at: UUFC, 2945 NW Circle Blvd, Corvallis OR 97330.

Credit Card - If you want to pay by credit card, if at all possible, please add 3% to your pledge amount to cover the fees we pay for those transactions. To pay by credit card, click [here](#).

Check - Checks can be made out to the UUFC. Please write the word "pledge" in the memo line of the check. Checks can be placed in the collection plate or in the wall-mounted wooden box outside the sanctuary. They can also be mailed to the office at: UUFC, 2945 NW Circle Blvd, Corvallis OR 97330

RMD distribution – for those who hold retirement accounts (401K, IRA and some others) who are 72 or older, if you were born on or after July 1, 1949, or those 70.5 and older, if born before July 1 1949, you can have your required minimum distribution (RMD) transferred directly to the UUFC. The advantage of this for you is that you then do not have to pay tax on these monies. Contact your retirement fund advisor or tax advisor for details.

If you have any questions, please contact Jean Gilbert businessmgr@uucorvallis.org

What If I Cannot Pay My pledge?

Financial hardship should never be an obstacle to Fellowship participation. Through good times and bad, we are all in this together. Annual waivers are available to any member facing financial difficulty. No paperwork needs to be filled out, there is no eligibility requirement, just have a quick conversation with our minister. Reverend Jill McAllister can be reached at minister@uucorvallis.org or 541- 752-5218 ext. 101.

Is My Pledge Tax Deductible?

Because the UUFC is a 501(c) (3) non-profit religious organization recognized by the IRS, your contributions are tax deductible. That said, the new tax law that went into effect in January 2018 significantly raised the standard deduction. In addition, high property tax states like Oregon were penalized in that restrictions were placed on the amount of property taxes that could be deducted at the federal level. So, while deductible, it is possible your donation will not have an effect on your tax liability. Consult your tax advisor or run the numbers through your preferred tax software. The Fellowship issues end-of-the-year tax letters showing total contributions made. If you made a financial contribution, you will get a letter in January letting you know the amount you gave.

Can Plate Offerings Be Used in Place of Pledging?

While gifts of all kinds and amounts are appreciated, money put into the plate on Sundays isn't enough to pay for the Fellowship's expenses. Sunday offerings for UUFC use represent just 1% of our annual budget.

What About the Time I Spend Volunteering?

Members and friends of the Fellowship are encouraged to give regularly of time as volunteers. Without our volunteers doing much of the Fellowship's work, our paid staff budget would need to be much higher or this work would not get done. Members and friends of the Fellowship often find that combining volunteer time with their pledge has an impact in their lives and in the life of our community that goes beyond either separate donation. Through volunteering, you spend time with others whom you admire, cherish and learn to love. You can learn new skills and share yours with others. Memories are often made. Volunteers with councils and teams also help make decisions on how Fellowship funds are spent. We encourage you to combine your pledge with your volunteer time to further our collective goal of living our values.

I still have questions, who can answer them?

For additional questions please contact the UUFC office at office@uucorvallis.org or 541- 752-5218. Someone there will put you in touch with the pledge drive coordinator or Finance Council Chair who can answer your questions.

(Our thanks to the First Unitarian Portland for some of this page's verbiage)

UUFC Pledging Worksheet

Fiscal Year: July 1 - June 30

One approach to planning your pledge is to use the UUA-suggested additions and subtractions to your adjusted gross income (below) and then to use this modified income number to determine your pledge using the Fair Share Giving guide also given below.

Determining Your Income for the Fair Share Giving Guide

Start with Adjusted Gross Income
(from IRS form 1040) _____

Add

Tax-exempt pensions and annuities _____

Tax-free income _____

Depreciation on rental property _____

Other _____

Total Additions _____

Deduct:

Non-reimbursed major medical expenses _____

Care of parent(s) _____

Costs of higher education _____

Costs of childcare _____

Total Deductions _____

Income to determine fair share commitment _____

Use the monthly pledge number from the table below to determine your annual pledge.
Enter this number on your pledge for

Fair Share Giving Guide

Adjusted Monthly Income	Approx. Adjusted Annual Income	Supporter 2-6% of Income		Sustainer 3-7% of Income		Visionary 5-9% of Income		Transformer 10% of Income	
		Suggested % of Income	Monthly Pledge	Suggested % of Income	Monthly Pledge	Suggested % of Income	Monthly Pledge	Suggested % of Income	Monthly Pledge
\$1,000	\$12,000	2%	\$20	3%	\$30	5%	\$50	10%	\$100
\$1,500	\$18,000	2%	\$30	3%	\$45	5%	\$75	10%	\$150
\$2,000	\$25,000	2%	\$40	3%	\$60	5%	\$100	10%	\$200
\$3,000	\$36,000	2%	\$60	3%	\$90	5%	\$150	10%	\$300
\$4,000	\$50,000	3%	\$120	4%	\$160	5%	\$200	10%	\$400
\$6,500	\$80,000	3%	\$195	4%	\$260	6%	\$390	10%	\$650
\$8,500	\$100,000	3%	\$255	5%	\$425	6%	\$510	10%	\$850
\$10,000	\$120,000	3%	\$300	5%	\$500	6%	\$600	10%	\$1,000
\$12,500	\$150,000	4%	\$500	5%	\$625	6%	\$750	10%	\$1,250
\$17,000	\$200,000	4%	\$680	6%	\$1,020	7%	\$1,190	10%	\$1,700
\$25,000	\$300,000	5%	\$1,250	6%	\$1,500	8%	\$2,000	10%	\$2,500
\$40,000	\$500,000	6%	\$2,400	7%	\$2,800	9%	\$3,600	10%	\$4,000

For more information about Fair Share Giving, and this guide, see <http://www.uua.org/finance/fundraising/budget>