

GIFT Experiment

Mid-Year Review

Prepared for the January 2014 Board of Trustees Meeting

by

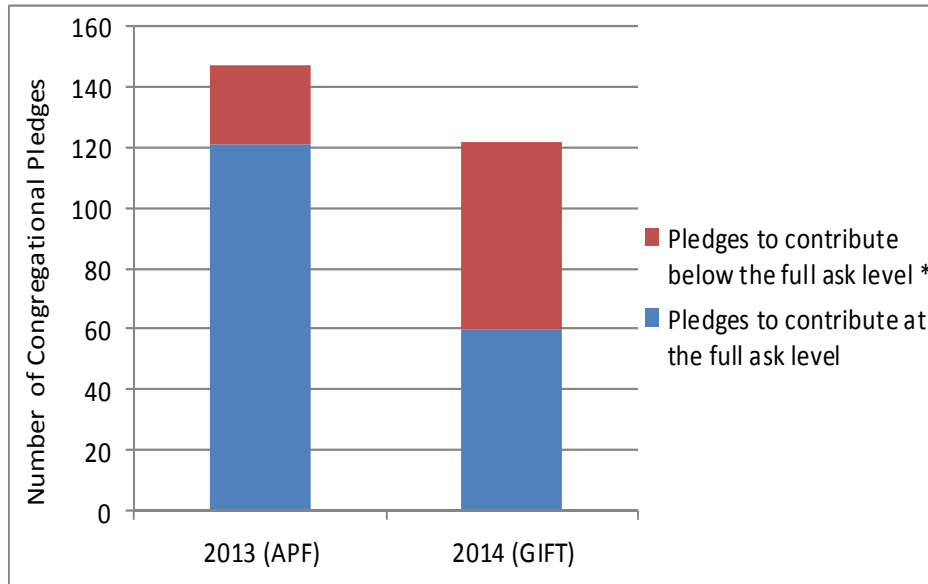
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Year to Date Pledges in the Southern Region



* The "full ask" in 2013 was \$58/member v. 7% of expenditures in 2014

Year to Date Income - Percentage to Goal

2013: 32.8%

2014: 29.0%

Observations

GIFT has been one attempt to reinvigorate the covenantal relationship among congregations and with the UUA following grassroots energy around two significant changes: 1) a single, combined ask between UUA and region/district, and 2) an ask based on percentage of expenditures instead of per member. Six months in, here is what we've found:

- Overall, pledges and contributions to date are down—17.0% and 3.8% respectively. However, this comparison reflects only APF historical behavior and the UUA portion of GIFT contributions (73% for UUA v. 27% for the Southern Region). In reality, congregations have had different giving patterns to the District and the UUA. Are congregations following past APF giving behavior for this combined ask, or past District giving behavior? Or given a new system, are congregations pledging and giving in entirely different ways than they have historically? What effect will regionalization have on congregational giving? We will have a fuller picture at the close of the Fiscal Year.
- The chart above illustrates a breakdown of pledges at the full ask level of 7% versus pledges of other amounts. However, as a part of GIFT this year we are recognizing pledges at the 5%, 6%, and 7% as "Fair Share". We expect that this is affecting giving behavior as well.
- GIFT has reinforced our belief in the power of the "Fair Share" symbol. Congregational expenditures are reported self-reported annually during the certification process, and it has been surprising how many congregations want to walk through calculating their certified expenditures line by line because they want to be doing the right thing when it comes to giving their 7%. Approximately 1/3 of Southern Region congregations have seen their ask increase this year—and we've had conversations with many of them who are incredibly anxious about losing their "Fair Share" status.