FIRST UNITARIAN SOCIETY

FINANCIAL FORUM
MARCH 1, 2026

ATRIUM AUDITORIUM, 12:15 PM

REV KELLY ASPROOTH-JACKSON, CO-SENIOR MINISTER
REV KELLY J CROCKER, CO-SENIOR MINISTER
TERRI PEPPER, DIRECTOR OF OPERATIONS

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AGENDA

Welcome & Agenda Review

Opening Reading

Current Finances - Overview

eGiving Update

Pledging & Overall Giving

2026-2027 Stewardship Campaign

Q&A

Closing Reading

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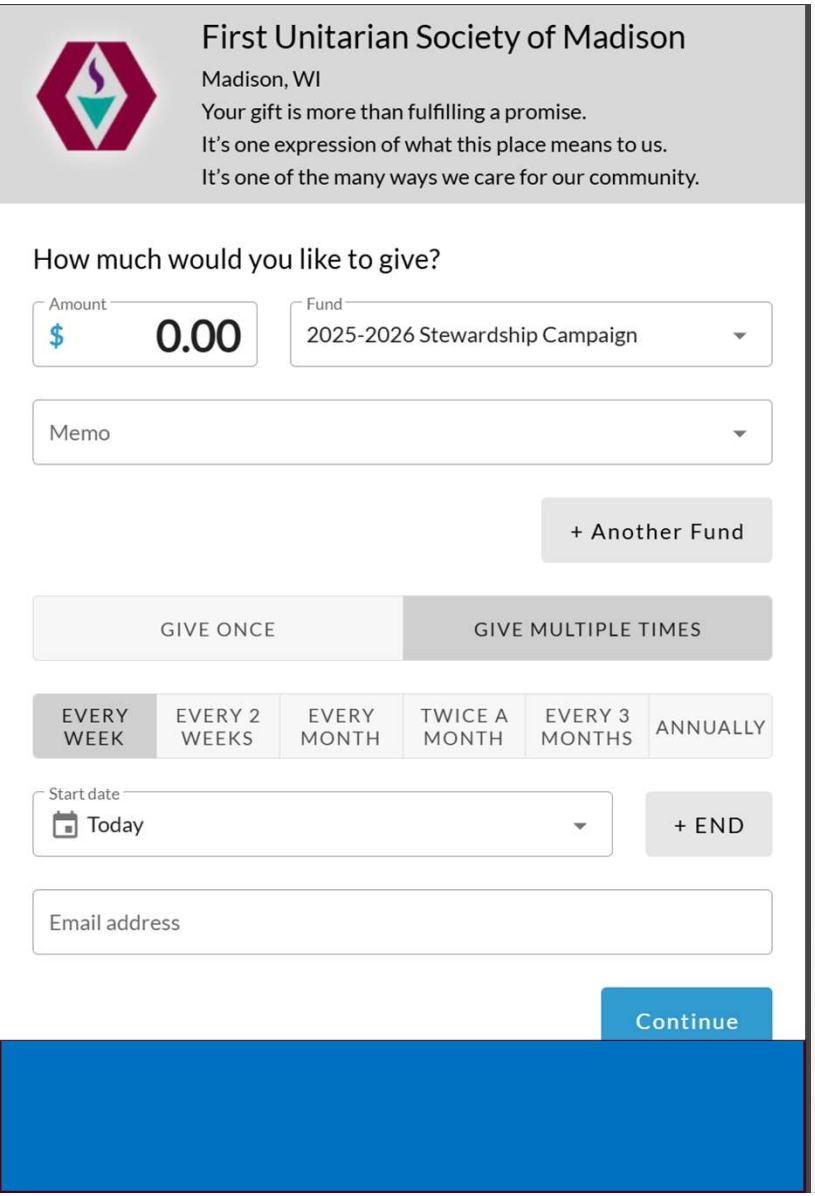
FUS FINANCES
AS OF Q2 (DEC 2025)

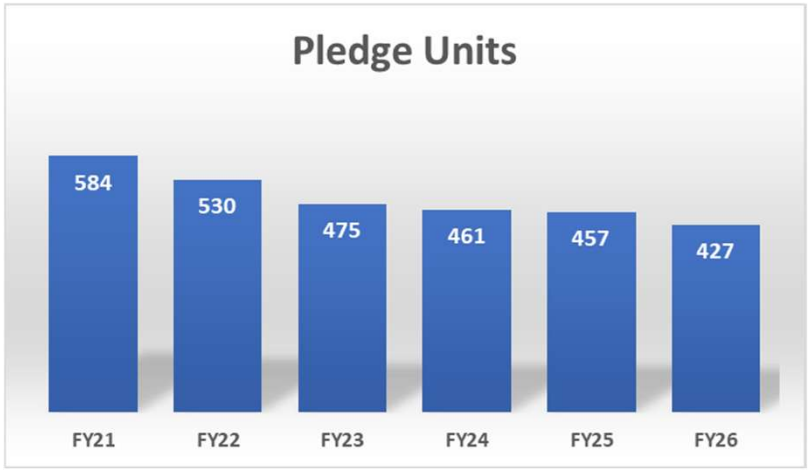
DEC 2025

- As of the end of the second quarter of this fiscal year (December 2025) net income is up significantly over the same time last year
    - Modest replenishment of cash reserves $28,112 as of today
    - Includes $17,158 from the Hornick bequest
- We ended the last fiscal year (June 2025) with a net loss of $25,236
    - 1.5% of $1,690,230 budgeted expenses
    - Property & Liability - $73,056 in FY25
- Property Insurance – options for this year
- YOY comparisons in Financials – continuing to make changes to the display of information. (e.g., mortgage expenses – principle & interest separate)



ONLINE GIVING

- Credit Card, EFT, Text to Give
- Payment Partner: Vanco
  - eGiving (Oct 2024) – online giving
  - Seamless integration with our Financial database (Ministry Platform)
  - Frequent updates/improvements/fixes
- Working on FUS system configuration
  - take better advantage of the system integration
  - Simplify recordkeeping
  - More precise alignment of coding between the FUS financial database and our accounting software



Pledging History
2020–21 to 2025-26

Consistent with denomination-wide trends

PLEDGING UPDATE

Pledge Campaign Goals

Year	Goal	Total Pledges	% of goal	Difference
FY25	$ 985,000	$ 987,579	**100.3%**	$ 2,579
FY26	$ 985,000	$ 958,311	97.3%	$ (26,689)
FY27	$ 1,000,000	$ 652,547	65.3%	$ (347,453)

Estimate of 273 Sustaining Steward households pledging at current level

PLEDGING UPDATE

Pledge Payments Received

Year	Total Pledged	Total Credited	% of pledged	difference
FY25	$ 987,579	$ 888,028	89.9%	$(99,552)
FY26	$ 958,311	$ 701,783	73.2%	$(256,528)

- 2025 Statements include pledge status for two fiscal years
  - 2024-25 Stewardship Campaign and
  - 2025-26 Stewardship Campaign
  - Please review statements carefully & let us know if anything is missing or incorrect

CONTRIBUTIONS – TOTAL HOUSEHOLDS

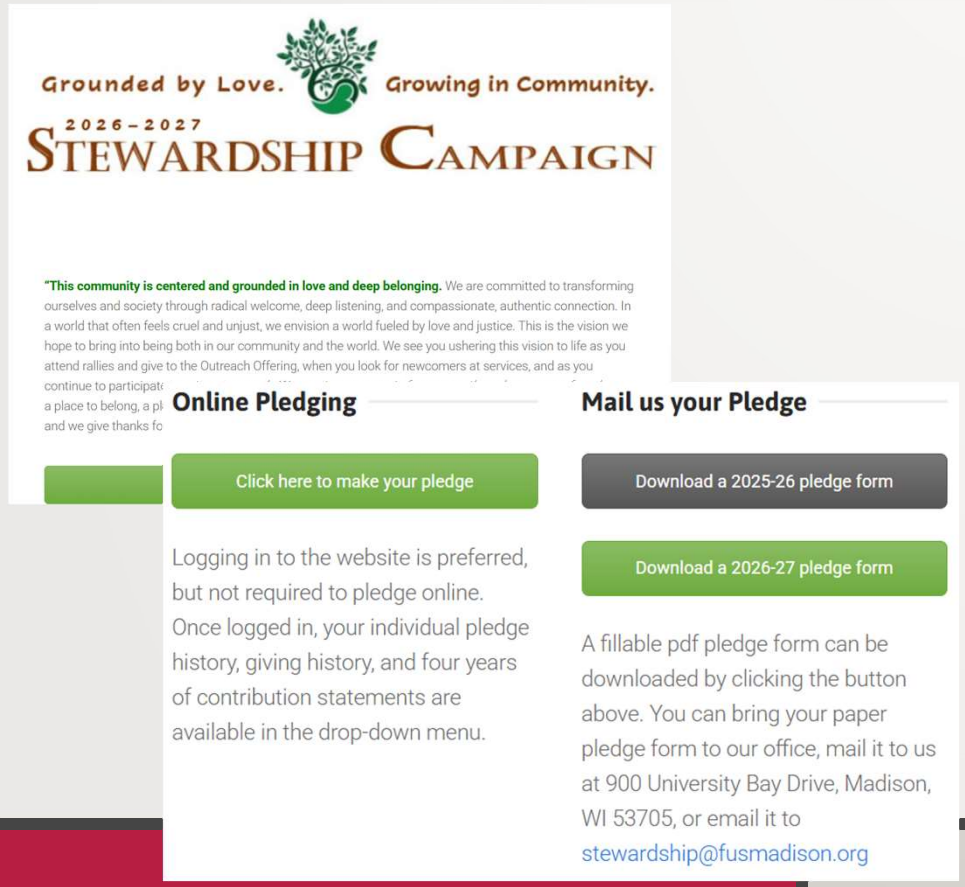
July 2024 – December 2025 (18-month range)

Pledge?	Households	%
Pledged 24/25 and 25/26	370	56%
Pledged either 24/25 or 25/26	97	15%
Unpledged contributions only	188	29%
Total Households	**655**	100%

- Annual Stewardship Campaign
- Memorial Gift
- Outreach Offering
- Other unpledged giving

Of Unpledged only 61 (32% gave to Outreach Offering only)

2026 – 27 STEWARDSHIP CAMPAIGN



www.fusmadison.org/stewardship

- Online pledging
  - Website login
  - Resources
    - Once logged in, individual pledge history, giving history, and four years of contribution statements are available
- Contact me or Director of Stewardship Cheryll Mellenthin with questions

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Q&A

Budget Forum – Sunday, April 26

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CLOSING READING