

UCV Demographics and Pledge Potential Report

Executive Summary

- The UCV Board asked interested volunteers to work together to provide some commentary on UCV's demographics and pledge potential in the context of 2018-19 site development studies led by Michael Clague and Gordon Gram. Over the December 2018 to March 2019 period, an active group of three, with help from several others, examined selected membership data provided by staff and began to examine other web-based resources on demographics and religious organizational trends. This document reports a first analysis of data gathered and makes recommendations for the future.

Findings

- Annual donations to UCV averaged \$467,186 over the past decade (excluding bequests but including capital donations). Annual variations were sizeable, and the unadjusted 10-year trend has been flat.
- Annual bequests to UCV averaged \$13,278 over the past decade and varied widely year to year.
- Donations increased substantially at times when major capital improvements were being made.
- The average donation in 2018 was \$1,041; the median was \$500. At \$375,734, donations in 2018 were the lowest in a decade, but exceeded the \$330,000 planned for achieving a balanced budget.
- A small number of donors have contributed most to the finances of UCV over the decade. In 2018 forty-two donors (12%) donated 50% of the funds and 319 donors (88%) donated the other 50%.
- In 2018 the ten top donors (3%) donated 24% of all donations.
- The ten top donors in 2018 were resident in eight different postal code regions of Metro Vancouver. Three of these resided in Point Grey. The others were, in alphabetical order: Dunbar-Southlands, Hillcrest, Kitsilano, New Westminster, Sunshine Coast, Victoria-Fraserview, and West End.
- Postal codes were available for 99% of donors. Dates of birth were available for only 18% of donors.
- Unitarian Universalist congregational membership declined approximately 21% in the USA and 19% in Canada over the period 2005-2015.

Recommendations for UCV

1. Re-establish and animate a Legacy or Planned Giving Committee to help ensure that UCV members are giving consideration to recognizing UCV in their wills. This has been a significant source of funding for UCV and could grow as members of UCV age and die.
2. Give moderately high priority to adding birthdate data to the church membership database (Breeze) to facilitate future planning for age-based services, donor planning, and ministerial transition.
3. Continue to support and celebrate the work of all Committees and Groups to foster a healthy and generous congregation.
4. Continue to call highly skilled professional ministers and religious educators.
5. Thank our most generous donors.
6. Consider asking generous donors to project their capacity to support the church in the future.

The Demographic and Pledge Potential (DAPP) Work Group

Active Team Members: Mairy Beam, Way Kent, Keith Wilkinson.

Other UCV members/friends who expressed interest but were unable to participate:
Dianne Crosby, Catherine Ponsford, Stanley Tromp.

Database analysis assistance: Collene Harris, John Smith, and Mairy's adult children.

Work Group Mandate: (as outlined by the Site Development Committee)

The task of this Work Group is to take the long view and develop a picture of UCV in the future. This work will start with a detailed look at the present membership and historic trends of new members and drop outs as well as the history and trends in pledging. From this information what can be projected?

It is suggested that this Work Group find pro bono assistance from one of the universities or colleges in designing the data to be collected and how to use the information to formulate a forecast.

This task is very important for the decision to be made at the completion of Phase 3. If at the conclusion of Phase 3 the business plan looks sound and it appears that the proposed redevelopment meets the objectives that have been set out then a key question to be addressed is does UCV have the capacity to manage a project of this size and complexity.

Reporting and Timing:

Report to the Board by the end of March 2019. Preliminary report to the Site Development Committee on 7 March 2018.

Team Processes:

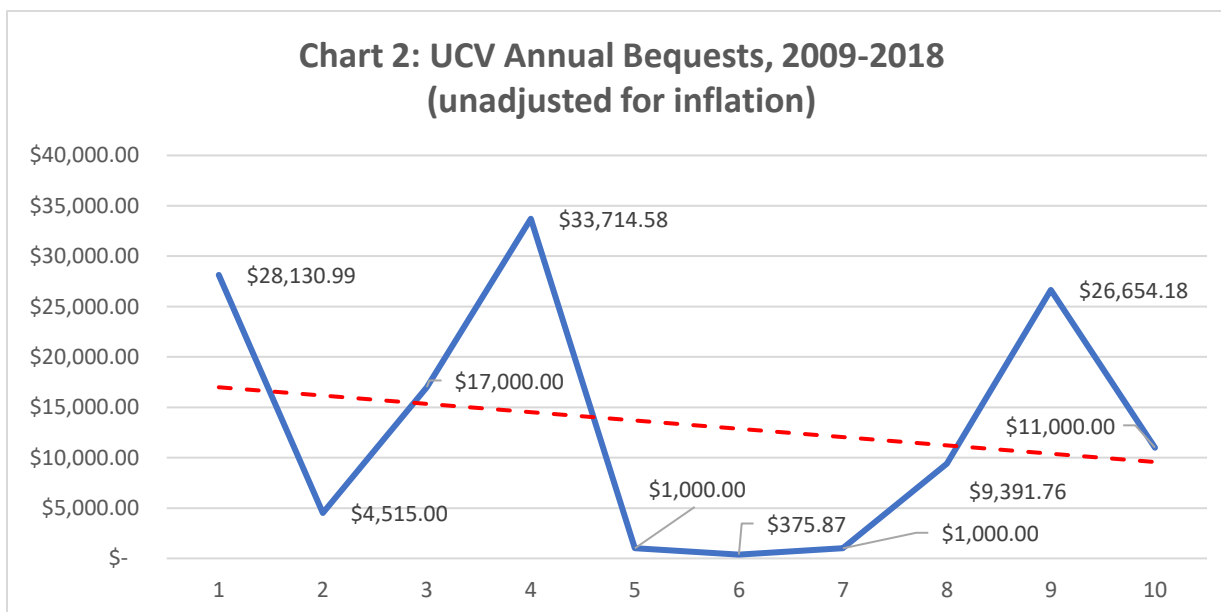
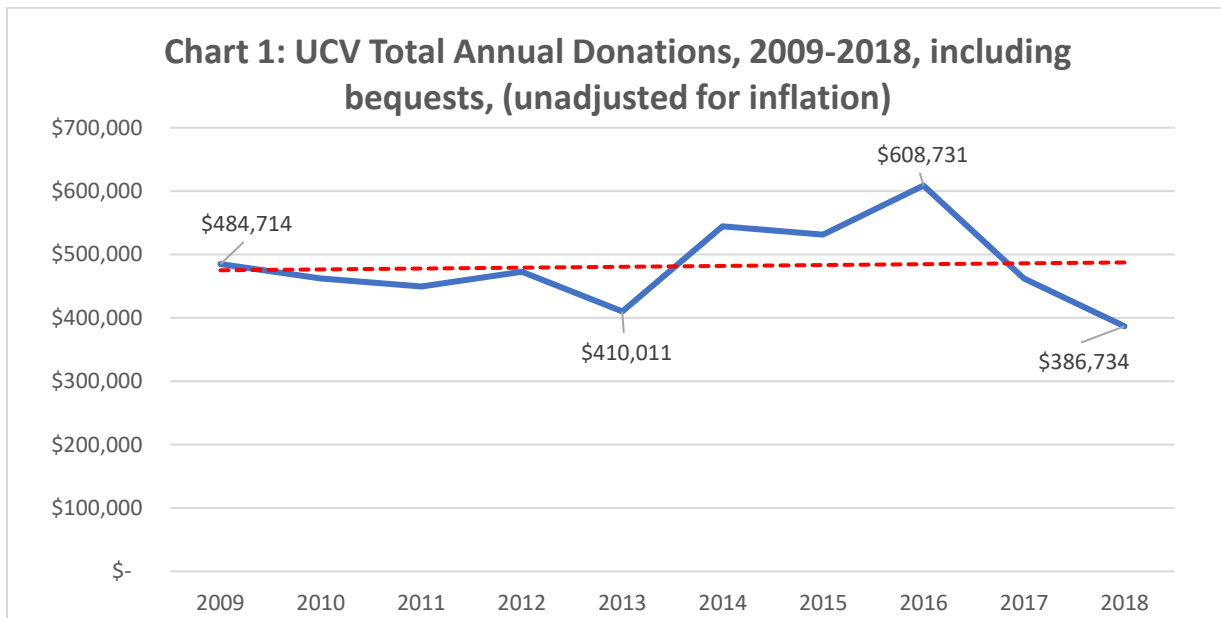
For many reasons it was difficult to find time to meet face-to-face, so three of us met once online via *zoom* and once face to face and carried on further discussions by e-mail involving others in the group.

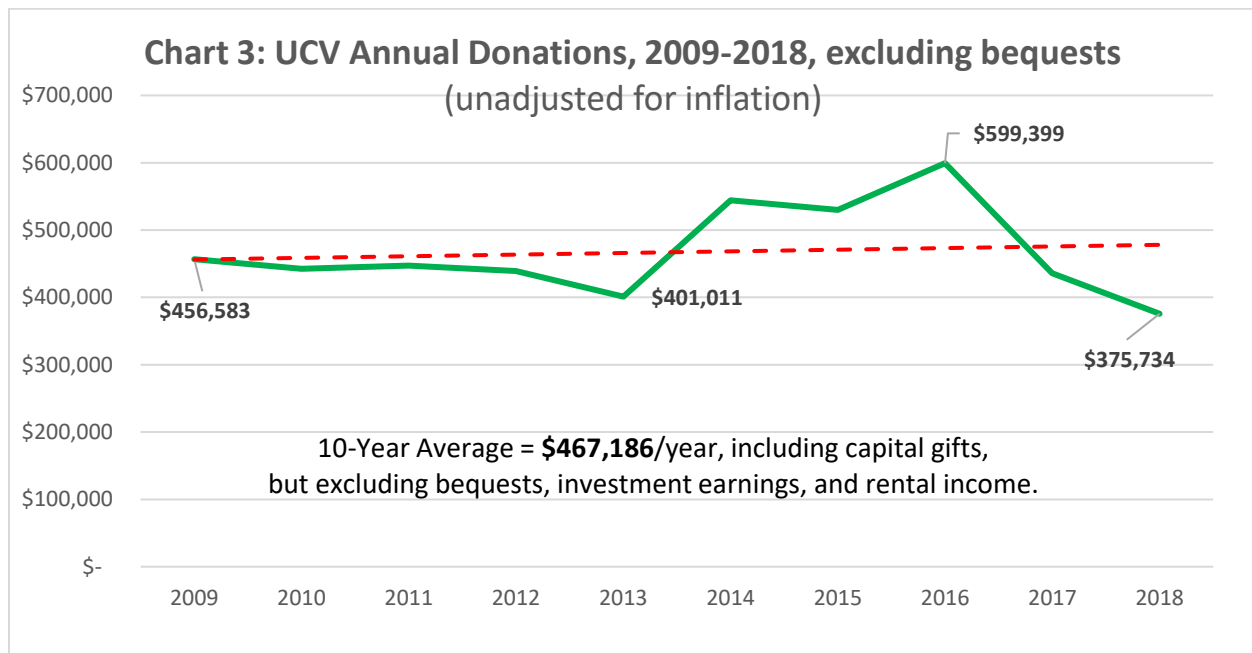
The Site Development Group had suggested that we contact top donors to try to estimate their willingness and ability to contribute financial support in the decades ahead. The DAPP work group did not have time to do this, and we also weren't sure we were best positioned to do so. Some discussion with the Canvass Committee members occurred, but that group also had other priorities. The board may wish to consider the appropriateness of such a process.

We have noted some general trends within the CUC and UUA and listed some descriptive studies but have not had time to comment on these except to note that there is a slow decline in UU membership across Canada and the USA. This may occur less in areas supported by strong professional ministries and RE programs.

UCV Donor Data, 2009-2018

Chart 1 shows the total unadjusted value of **donations and bequests** to UCV for each of the calendar years 2009-2018. Chart 2 shows the unadjusted value of **bequests**, and Chart 3 shows the unadjusted value of **donations**. *Over this decade the pattern of donations has been relatively stable and the pattern of bequests erratic.* There were only 21 bequests received during the decade. The average value of a bequest was \$6,323, the median \$2,500, and the mode \$1000. Further comments follow the charts.





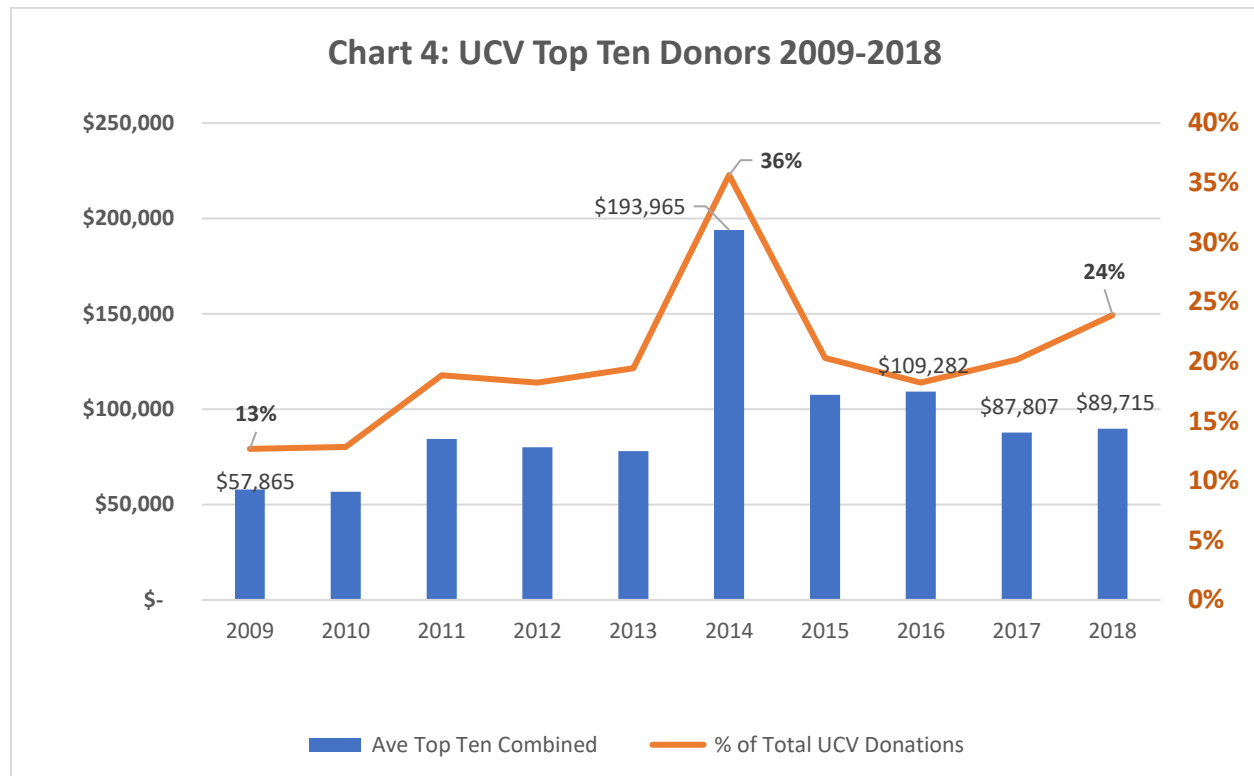
Commentary on Charts 1 & 3, Donations - In the three years 2014 through 2016, UCV campaigned for financial support for capital expenses (to replace roofs). Annual donations during this period rose substantially, presumably in response to this campaign. Subsequent to this multi-year campaign, donations dropped in 2018 to their lowest level in a decade (\$375,734), but still exceeded the budgeted donations of \$330,000 required by the church for a balanced budget both in 2016-17 and 2017-18. (Source: UCV approved budget 2017-18.) *This response to a call for special funding and a return to lower but adequate funding suggests a healthy capacity within the congregation for making donations responsive to church needs – but should we expect this historic trend to continue into the future?*

The average annual donation per donor to UCV was \$1,019 in 2009 and \$1,041 in 2018. The median amount was \$500 in both years. Considering inflation, this is approximately a 14% declining trend over the decade, offset by higher values in 2014 through 2017. ***Note:** The *median* (the middle point above and below which 50% of donations fall) may be a more useful indicator of typical donations than the *mean*. Means, medians, and modes (most common values) for the decade are listed in **Table D** at the end of this document. The midpoint of total donations in 2018 showed 42 donors above and 319 below that point. That is, 42 of 361 donors gave half (\$187,867) of UCV’s donations and 319 donors gave the other half. (See later commentary regarding top donors.)

Commentary on Chart 2, Bequests – The erratic nature of bequests suggests the obvious—that UCV should not rely on bequests as a stable source of funding. Twenty-one bequests with a total value of \$132,782 were received over the decade, suggesting that bequests can be a helpful though not major contributor to the long-range financial health of the church. *The DAPP Work Group recommends that the board give high priority to re-establishing and activating a **Legacy or Planned Giving Committee**. This is of particular importance in light of what we know about the aging Metro Vancouver population and the likelihood that bequests to UCV could increase as older members and friends of UCV die.* (See *Chart 5* based on Statistics Canada data for Metro Vancouver age demographics.)

Commentary on Chart 4 - Top Donors – This chart summarizes the donations made to UCV by its top ten donors from 2009 to 2018. The particular pledging units may differ each year, but collectively *UCV’s top ten donors have given 20% of church donations over the decade*. During the 2014-2017 period of capital campaigns this group contributed as much as 36% of donations. In 2018, donations from the top ten donors totaled approximately \$90,000 or 24% of total donations of \$376,000.

Retention of this group of donors is obviously very important to the church’s financial health, and ways to find and encourage other high donors should be considered.

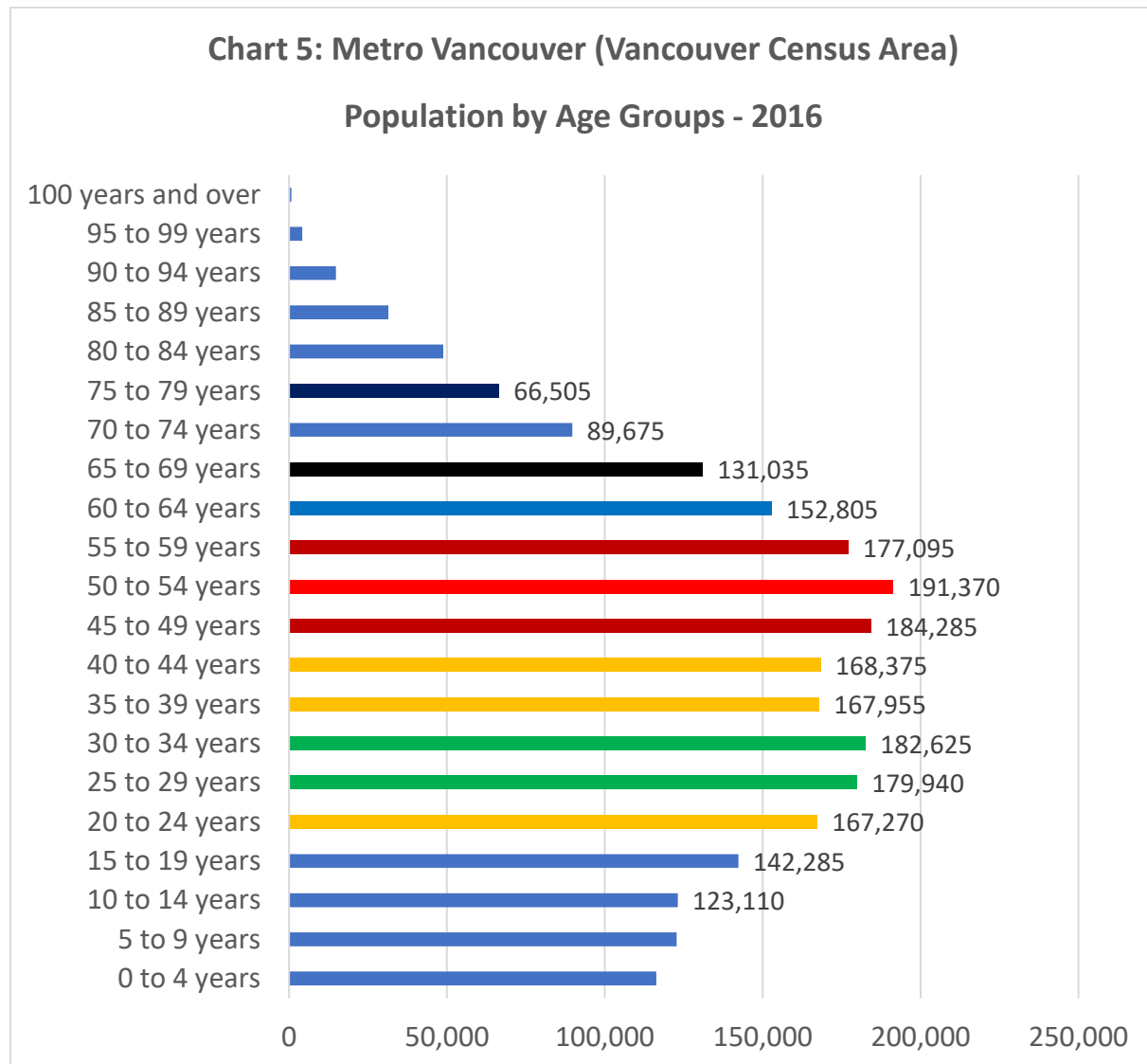


Neighbourhoods of Residence – Of 2,566 donation records from 2009 to 2018, almost all (99.9%) had postal codes. Analysis of records for the 10 top donors in 2018 revealed that they were resident in *eight different postal code areas*, three in Vancouver Point Grey, and one each in seven other neighbourhoods, namely, in alphabetical order: Dunbar-Southlands, Hillcrest, Kitsilano, New Westminster, Sunshine Coast, Victoria-Fraserview, and West End.

Membership analysis by age – Only 18% of the 2,566 donation records had birthdates. Among the top ten donors in 2018, birthdates were available for only five. The average age of these donors was 77 years and their combined donation was \$41,429 or 11% of total donations. Adding date of birth to member records in the new membership software (*Breeze*) might be of value to various UCV user groups – e.g., Care and Concern Committee, neighbourhood social groups, young adult initiatives, and religious exploration groups, and contemplative circles (covenant groups). Further analysis of neighbourhood of residence separately for members, friends, and donors could be considered if it was felt that knowing this could help UCV improve its services or revenues. The UCV Membership Committee (or a broadly-based UCV task force) could be asked to initiate further analysis and use of this data.

Statistics Canada Data

Stats Canada data are voluminous and difficult to analyze and use. Chart 5 below displays Metro Vancouver population by age group for 2016. Since we know that UCV draws from many Metro Vancouver postal code areas, this data set may be appropriate for consideration, although it also includes areas that UCV does not serve in any substantial way including Surrey, Delta, North Vancouver, and West Vancouver. Metro areas such as Coquitlam and Port Coquitlam are in a different Census Area.



To the extent that this distribution reflects the UCV member catchment area we can postulate the following 10-20 year trends. Although many factors may make this inaccurate, we might expect:

1. A significant **growth in an older population**. For example, in 10 years the 75-79 year old population will have roughly doubled based on current populations of 66,505 and 131,035 in those groups. The 2016 bulge in the 45-59 yr cohort may become a bulge in the population between 55 and 69 years.
2. A **decline in the younger population**. The 25-34 yr cohort may be significantly **smaller** than now.

3. Immigration into and emigration from Vancouver may affect these population trends.

Special populations

UCV may be able to design its programs and services to serve a variety of Metro Vancouver population groups other than age groups. For example, **Table A** below highlights a sizeable indigenous community in Metro Vancouver. Although it seems unlikely that UCV would ever draw substantially from this population, other cultural populations may be attracted to UCV if suitable programming was offered. **Table B** shows basic population indicators for Canada, BC, and Metro Vancouver.

Table A: Indigenous & Non-indigenous Population, Metro Vancouver Subdivisions, 2016

2016 Statistics Canada Census Subdivision*	Total Population	Indigenous Population	% Indigenous
Burnaby City	230,075	4,195	1.82%
Burrard Inlet IR	1,855	365	19.68%
Capilano 5 IR	2,910	1,025	35.22%
Delta District	100,840	2,710	2.69%
Musqueam 2 IR	1,650	795	48.18%
New Westminster, City	69,905	2,295	3.28%
North Vancouver, City	52,185	1,155	2.21%
North Vancouver Municipality	84,875	1,355	1.60%
Richmond	196,660	1,595	0.81%
Semiahmoo IR	120	45	37.50%
Surrey, City	511,540	13,460	2.63%
Tsawwassen IR	750	235	31.33%
White Rock City	19,120	560	2.93%
West Vancouver, District Municipality	41,680	240	0.58%
Vancouver City	618,210	13,900	2.25%
TOTAL	*1,932,375	43,930	2.27%
Approximate UCV catchment area	1,048,570	20,895	2.00%

*The combined *Census Subdivisions* population is smaller than the *Vancouver Metropolitan Census Area* population of 2,463,435. (Source: [Stats Can 2016 Census](#))

Table B: Basic Population Indicators

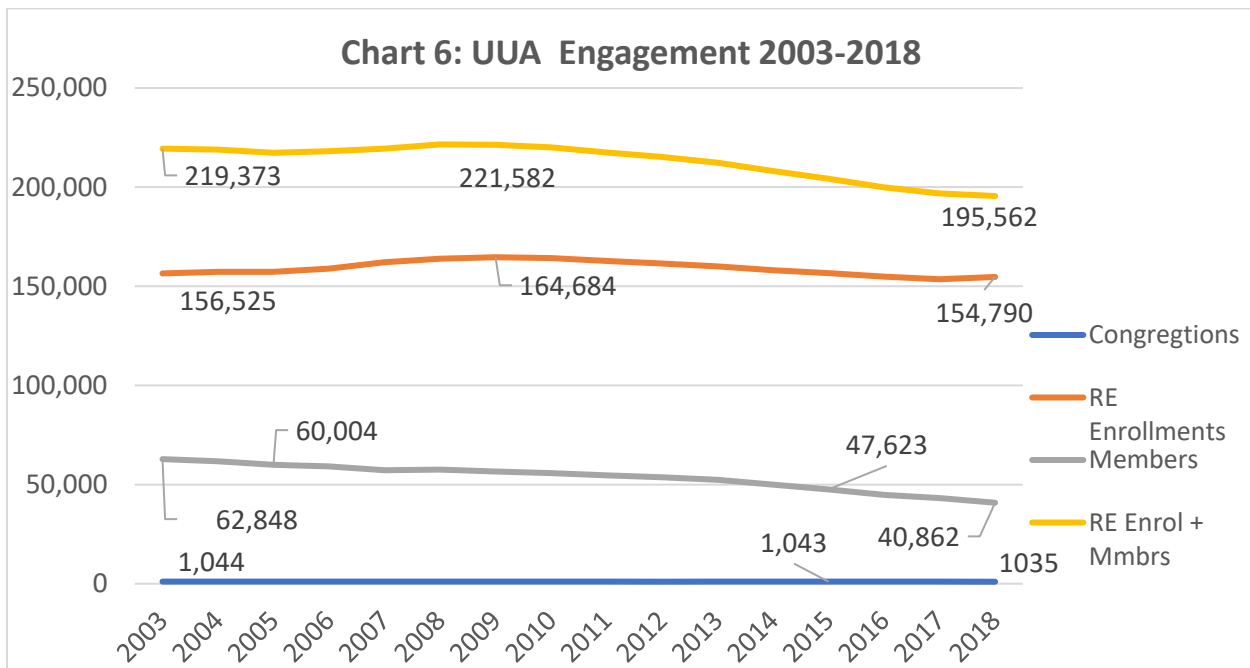
Population, Canada, 2016		35,151,728
Population change 2011 to 2016 (%)	5.0%	
Population, BC		4,648,055
Population change, 2011 to 2016 (%)	5.6%	
Population, Metro Vancouver Subdivisions (See Table A)		1,932,375
Population, Vancouver Census Metropolitan Area (See Chart 5)		2,463,435

CUC and UUA Trends

Table C: Canadian Unitarian Council Membership 2005 & 2015

Total Membership by Region:	2005	2015	% of '05	Change
British Columbia 1194	1367	1194	87%	-13%
Western 877	1041	877	84%	-16%
Central 1484	1637	1484	91%	-9%
Eastern 805	1316	805	61%	-39%
Total (All Congregations) 4360	5361	4360	81%	-19%

Membership in CUC member congregations declined by 19% between 2005 and 2015. More recent data has not been released yet. Membership decline was lowest in the Central Region at 9% and BC at 13%.



UUA Engagement – The Unitarian Universalist Association (UUA) in the USA uses several measures in addition to membership numbers to measure “engagement”. These are summarized in **Chart 6**. One of these that UCV might consider is the measure of RE Enrollments. UUA has approximately 25 times more congregations and 11 times more members than CUC (UUA had 1,043 congregations and 47,623 members in comparison to the CUC’s 42 congregations and 4,360 members in 2015.) Between 2005 and 2015, UUA membership declined **21%** compared to **19%** in the CUC. Anecdotally, lower decline is thought by some to be attributable to the presence of strong professional ministry and RE leadership.

Table D: Annual mean, median, mode, and count of donations to UCV in unadjusted dollars (including capital donations but excluding bequests)

Measure	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Mean	\$1,019	1,008	1,078	1,143	1,104	1,568	1,373	1,294	1,300	\$1,040
Median	\$500	500	490	600	600	630	600	530	635	\$500
Mode	\$20	20	20	20	20	600	500	100	300	\$100
Count	449	440	416	385	364	348	387	464	336	362

Data Sources

Statistics Canada [Census Program 2016](#)

UCV *Breeze* Membership Database (and preceding *PowerChurchPlus* membership database)

Selected Resources

Canada Helps (2018) [The Giving Report](#)

Canadian Unitarian Council [website](#) and Executive Director

Imagine Canada (2018) [Thirty years of giving in Canada](#)

Pew Research Center. (2018) [Why America's 'nones' don't identify with a religion](#)

Pew Research Center. (2016) [The factors driving the growth of religious 'nones' in the US](#)

Pew Research Center (2013). [Canada's Changing Religious Landscape.](#)

Pew Research Center (2012). [Religious Composition by Country](#)

Statistics Canada (2018). [A Portrait of Canadian Youth.](#) [pdf version]

UUA, [Breakthrough Congregations, 2017-18](#)

UUA, [Archive of Breakthrough Congregations, 2005-2016](#)

UUA, [Tips for reaching "Nones", Activists and Spiritual Seekers through Social Media](#)

McCullough, J. J. (2018) [Canada Guide, Religion in Canada](#) – personal website (“Because Canadians have so many distinct (and often conflicting) thoughts about God and religious morality, learning to respect the faith of others while still honouring your own has long been a vital part of maintaining a peaceful, cooperative country.”)

2019 UCV Canvass Campaign Theme and Logo



Embracing the Future