

WELS Ministry of Christian Giving (MCG) Director's Report March 2023

1. Congregation Mission Offerings (CMO)

January, 2023-March, 2023 \$5,050,692 1.2% increase from 2022
 January, 2022-March, 2022 \$4,989,905 4.6% increase from 2021

	Active congregations asked to remit CMO 2023 gifts*	CMO non-contributors as of 4/05/23	No gifts to WELS as of 4/05/23
2023	1,178	274	254

* = Excludes Canadian and CMO/budget partners (e.g., dual parish, multi-site)

As of 4/11/2023 2:02:03 PM

Appeal	Goal	Amount Received	Variance	No. Donors
CMO2019	\$20,913,700.00	\$21,242,961.62	\$329,261.62	1146
CMO2020	\$21,108,000.00	\$21,741,202.14	\$633,202.14	1153
CMO2021	\$21,620,000.00	\$22,678,866.24	\$1,058,866.24	1136
CMO2022	\$22,450,000.00	\$23,332,775.53	\$882,775.53	1126
CMO2023	\$22,960,000.00	\$5,819,512.46	(\$17,140,487.54)	934
	\$109,051,700.00	\$94,815,317.99	(\$14,236,382.01)	5495

Goal=CMO projected receipts for the calendar year; Amount Received=CMO received for the calendar year; Variance=how much gifts are above or (below) goal; No. Donors=number of congregations who gave CMO out of the 1,234 who were asked to remit them.

Kurt's observations: By God's favor and empowered by his Spirit, our churches have offered Congregation Mission Offerings (CMO) of \$5.05 million during the first three months of 2023 for Christ's gospel work through our synod. This total is 1.2 percent (\$61,000) more than CMO 2022 for the same period. We thank our Lord for continuing to bless us through his people's generous gifts! Churches can learn more about the impact of their offerings at wels.net/annualreport.

2. WELS Endowment Funds

The Lord continues to bless ministerial education and home/joint/world missions through current and expected gifts to the WELS endowments that were established in 2005. By God's grace, the annual distributions continue to increase. The distribution policy (see footnote) enables distributions to continue even during periods of investment decline. (Note: According to Vanguard, 2022 was the third-worst year since 1928 for equities' returns and the worst year since 1928 for bonds' returns.)

Report of Endowment Fund Totals as of March 31, 2023

Endowment Funds	December 2006-2022	2023 through 3/31/2023	Cumulative Totals	Expectancies
WELS Min Education	6,924,658	401,998	7,326,656	11,463,594
MLC	3,423,063	213,718	3,636,781	12,739,206
MLS	419,266	25,972	445,238	122,344
WLS	2,159,155	134,188	2,293,343	15,096,503
LPS	822,478	50,449	872,927	427,431
WELS Mission	12,748,447	799,035	13,547,482	16,143,641
Home Missions	1,129,753	106,243	1,235,996	16,120,924
World Missions	3,295,303	236,601	3,531,904	9,122,061
Total	30,922,123	1,968,204	32,890,327	81,235,704

Distributions*	2019	2020	2021	2022
WELS Min Education	187,991	202,839	230,083	255,496
MLC	109,887	114,493	126,214	136,233
MLS	14,690	15,284	16,484	17,415
WLS	70,425	74,183	81,346	87,239
LPS	26,045	28,250	30,674	32,671
WELS Mission**	394,842	414,490	455,845	494,985
Home Missions	19,934	24,122	31,958	39,419
World Missions	93,347	102,732	115,806	126,793
Total	917,161	976,392	1,088,410	1,190,251

*Distributions based on the four-year rolling average as of June 30

**Distributions are considerably higher since Mission Expansion Endowment balance as of 6/30/2007 was rolled into the new WELS Mission Endowment Fund

3. 100 Missions in 10 Years

Ministry of Christian Giving is working with WELS Home Missions on the “100 Missions in 10 Years” synodwide campaign that was approved at the 2021 WELS convention. The goal of the initiative under God is to plant 100 new home mission churches and enhance 75 existing ministries from 2023-2033. WELS mailed materials to congregations in August and sent e-appeals and a mailed appeal to individuals in September. Groups and individuals can learn more at wels100in10.net. The synodwide campaign runs through June 2024. Since July 2021, we have received 1,531 gifts/commitments from 1,242 individuals/groups totaling \$1,445,284. God be praised!

4. WELS Gifts/Bequests for the Fiscal Year

Unrestricted:	22-23	\$ 7,497,204	Mar 31, 2023
	21-22	\$14,953,832	
	20-21	\$11,662,217	
	19-20	\$10,456,107	
	18-19	\$ 5,529,506	

Temporarily Restricted:	22-23	\$12,299,173	Mar 31, 2023
	21-22	\$17,022,713	
	20-21	\$16,318,366	
	19-20	\$13,181,083	
	18-19	\$11,173,245	

Permanently Restricted:	22-23	\$ 2,164,340	Mar 31, 2023
	21-22	\$ 2,549,014	
	20-21	\$ 2,277,710	
	19-20	\$ 3,431,257	
	18-19	\$ 1,366,761	

Kurt's observations: Gifts and bequests come from individuals and foundations who support WELS now with direct gifts or who arrange to make bequests after their souls enter heaven. These offerings to the Lord are precious responses to Christ's love for us! For assistance in encouraging such gifts/bequests, request a "Different Ways to Make Planned Gifts" presentation or a seminar on congregational planned giving (number 12 below) by calling 414-256-3209/800-827-5482.

5. WELS Deferred Expectancies Arranged and Revised

By God's grace, our Christian giving counselors (CGCs) regularly help WELS members arrange new deferred expectancies (irrevocable/revocable) for the ministries that touch their hearts. In addition, our counselors nurture those who have an existing deferred expectancy. We heartily thank Jesus for prompting his people to arrange **\$25.3 million in new or revised deferred expectancies** from July 1, 2022-March 15, 2023. If your congregation would like to learn more about **Christian estate planning** and the resultant gifts that will benefit your ministry, please call your area's deferred CGC (wels.net/givingcounselors) or phone our office at 414-256-3209/800-827-5482.



6. Charitable Gift Annuity Appeal

In September, we mailed a charitable gift annuity (CGA) appeal, sponsored by WELS Foundation, to all WELS members in our database who are age 60+ (33,000 households). We thank WELS Foundation for offering this unique giving tool that enables WELS members to arrange ministry distributions and personal income payments.

7. IRA Charitable Distribution Opportunity

IRA charitable distributions provide a unique giving opportunity for anyone 70.5 or older to direct qualified charitable distributions to WELS ministries from their IRA accounts. These distributions may count as the donors' required minimum distributions; when given directly to charity, they are tax-free for federal tax purposes and may be treated similarly by their state. We encourage our people to contact their financial/tax planners or visit wels.net/qcd to learn more.

8. Donor Advised Funds Gifts and Distributions

Gifts into WELS Foundation Donor Advised Funds

22-23	\$1,669,741	Mar 31, 2023
21-22	\$ 6,993,465	
20-21	\$ 1,305,050	
19-20	\$ 737,599	
18-19	\$ 552,897	

<u>DAF Distributions</u>	<u>to WELS Funds</u>	<u>to WELS Synod Schools</u>	<u>to WELS Endowments</u>	<u>to Cong & Agencies</u>	
22-23	\$6,751,395	\$5,612,374	\$129,199	\$ -0-	\$1,009,822
21-22	\$1,722,141	\$ 150,373	\$124,179	\$ -0-	\$1,447,589
20-21	\$1,512,572	\$ 123,753	\$110,757	\$ -0-	\$1,278,062
19-20	\$ 636,746	\$ 45,014	\$ 45,799	\$ -0-	\$ 545,933
18-19	\$ 687,983	\$ 84,163	\$ 41,613	\$ -0-	\$ 562,207

Kurt's observations: These special gifts and distributions reveal the fruit of the Spirit in the hearts of God's people. We consider it a privilege to assist WELS donors and ministries in these ways.

9. WELS Connection

April – Inter-Church Relations – Africa

May – Congregational Services – Lutheran Leadership Conference

June – Home Missions Durham, N.C.

Kurt's observations: *WELS Connection* vividly portrays the ways God uses WELS to proclaim Christ's love to the world supported by our Congregation Mission Offerings and individual mission offerings. If you would like more information on subscribing, please contact Sarah Proeber in Communication Services at sarah.proeber@wels.net or 414-256-3210.

10. Grace of Giving Newsletter

MCG works with WELS Communication Services, WELS Foundation, and Sharpe Group to produce a newsletter that shares ministry updates and opportunities for supporting WELS ministry through different types of planned gifts. The April 2023 issue focuses on charitable remainder trusts and IRA charitable distributions. An online version of the newsletter is found at wels.net/christian-giving.

11. Stewardship Programs

In May 2021, WELS Congregational Services released a congregational stewardship challenge called *A God-Lived Life*. This program seeks to stress the "whole life" approach to stewardship, including

our time, talents, treasures, temple (our bodies), and God's Truth. You can access it at welscongregationalservices.net. You can also visit wels.net/stewardship for an archive of past stewardship programs.

12. Congregational Planned Giving Program

WELS Ministry of Christian Giving's congregational planned giving program manual helps congregations promote planned giving opportunities to members. It also provides guidance on starting an endowment for long-term ministry support as well as setting up a planned giving committee. The manual and related resources are available at wels.net/plannedgivingprogram.

Kurt's observations: I encourage congregational leaders to review this program—considered an “industry best practice” by the Sharpe Group—and implement its ideas to help God's people better plan gifts both now and at life's end.

13. WELS Christian Giving Training

WELS Ministry of Christian Giving annually offers development training to WELS employees and anyone serving in development for a WELS-affiliated ministry. Our next session will be January 8-12, 2024. If you are interested in attending, contact karen.martinez@wels.net.

14. “Christian Giving Now and for the Future”

Rev. Kurt Lueneburg and Mr. Adam Goede presented on this topic at the 2023 WELS National Conference on Lutheran Leadership. The presentation reviewed today's giving opportunities and methods in the light of Christ's unchanging Scriptures. It covers electronic giving options, gifts of assets, and how planned gifts can help members support Christ's church a generation or two down the road. Access the presentation at mcg.welsrc.net.

15. Personnel Changes

Rev. Dr. Michael Dietz (Northern Wisconsin District) and Mr. Rick Kneser (Southeastern Wisconsin District) fully retired from their Christian giving counselor ministries on December 31, 2022. We thank our Lord for giving them to us and we pray that Jesus will bless their wives and them in the next phase of their lives!

Mr. Scott Wagner was reassigned by the Conference of Presidents (COP) from the Dakota-Montana and Nebraska Districts to the Southeastern Wisconsin District as of January 1, 2023. May our Lord bless his service to God's people in this new area!

Mr. Terry Helton accepted the COP's call to serve the Michigan and North Atlantic Districts and Mr. Patrick Ruehrdanz accepted the COP's call to serve the Northern Wisconsin District as Christian giving counselors. Both men start their Ministry of Christian Giving duties on May 1, 2023. May our Savior bless their orientation, training, and donor nurture!