

## **Our calling**

WELS Ministry of Christian Giving (MCG) serves on behalf of the Conference of Presidents (COP) to encourage every WELS member to “excel in the grace of giving” through Christ. We consider it a privilege to help God’s people offer gifts to Jesus for his work in their congregations, synod, and other WELS organizations.

MCG assists the COP with their responsibility to fund the Lord’s work through our synod. This funding is provided through Congregation Mission Offerings (CMO) as well as direct gifts to WELS from individuals and foundations.

- In the area of CMO, our efforts are focused on supplying congregations with information on ministry opportunities and needs as well as stewardship training resources.
- In the area of direct gifts from individuals, we regularly mail and e-mail appeals that explain our gospel work and encourage support of synodical ministries. We also provide information to donors about Christian estate planning and other planned giving options that allow them to give in a way that is beneficial for them, their families, and the ministries close to their hearts. Also, MCG supports Christian giving counselors (12.9 full time equivalents – some counselors are semi-retired) across all 12 districts of WELS to assist God’s people with gifts of any kind. Their services are free and confidential.
- Gifts from foundations often result from consultation between the MCG director, other synod leaders, and the foundations regarding funding of new ideas and enhancements to ministry.

## **Our current situation**

### *Review of WELS Ministry of Christian Giving*

A special committee appointed by the COP completed its review of the MCG in 2017 saying the MCG is well-positioned to help God’s people positively impact WELS ministry going forward. We encourage you to make use of our free, confidential assistance by contacting us at [mcg@wels.net](mailto:mcg@wels.net) or 800-827-5482.

### *Congregation Mission Offerings (CMO)*

In 2017, MCG and Communication Services helped the COP continue special videos and instruction letters personalized to each district that illustrated the work Jesus does through the areas of ministry supported by our CMO. We thank God and commend our congregations for their steady offerings year after year, which is a thankful response to Christ’s love. CMO for 2017 totaled \$21.4 million, which was 0.7 percent above commitments and 1.4 percent above prior year receipts. We were also pleased that 97 percent of eligible congregations submitted a CMO subscription for 2018. Subscriptions point to a decrease of 0.5 percent from 2017 actual offerings.

### *Christian giving counselors*

Through face-to-face visits and presentations, our Christian giving counselors (CGCs) invite faith-prompted support of WELS ministries. This fiscal year, the CGCs have been distributing information about the “Tomorrow’s Ministry Begins Here” campaign for Michigan Lutheran Seminary (see below),

Congregational Services, Home and World Missions, the ministerial education schools, WELS Church Extension Fund, WELS Foundation, and the WELS endowments.

During each one of the past ten fiscal years (FY08-FY17), the CGCs have averaged (per full-time equivalent [FTE]) 291 meaningful face-to-face donor visits and have nurtured an average (per FTE) of \$497,078 in immediate gifts (ten-year total of \$63.9 million) and \$2,478,114 in deferred expectancies (ten-year total of \$320.6 million). In the first nine months of fiscal year 2017-18, WELS Christian giving counselors (12.5 FTEs) conducted 2,420 free, confidential visits with God's people and 244 presentations (Christian stewardship, Christian estate planning, or WELS Mission and Ministry) that helped facilitate \$4.8 million in gifts received for WELS and \$16.4 million in deferred expectancies for congregations, synod, and other WELS organizations. For the 2017-19 biennium, our church body is annually investing approximately \$1.5 million in our field staff and about \$500,000 in our office staff so we may serve Jesus, his gifted people, and our areas of ministry. In view of the ten-year totals for immediate gifts and deferred expectancies mentioned above, we thank our Lord for the generous return he's given our investment in the Ministry of Christian Giving.

Mr. Carl Leibner fully retired and Rev. Dr. Michael Dietz semi-retired on June 30, 2017, and Rev. Steve Staude fully retired on December 31, 2017. Mr. Scott Wagner accepted the call to serve as deferred CGC in the Dakota-Montana District beginning May 30, 2017. Rev. Phil Gieschen accepted the call to serve as current CGC in the Minnesota and Nebraska Districts beginning July 1, 2017. Mr. Mark Arnold accepted the call to serve as deferred CGC in the South Atlantic District beginning August 1, 2017. Rev. Jerry Ewings accepted the call to serve as current CGC in the Western Wisconsin District beginning January 1, 2018. We thank Carl Leibner and Steve Staude for their service to the Lord and his people and pray for God's blessings on the new counselors.

Our MCG office and Christian giving counselors regularly coordinate donor nurture efforts with Home and World Missions as well as our ministerial education mission advancement (MEMA) offices. One of our CGCs is assigned as our team's liaison to each ministerial education school. In addition to ongoing communication, MCG, MEMA, and Home/World Missions personnel participate in an annual face-to-face conference, and we meet via web conference about four times during the year. Such proactive coordination minimizes the potential for donor fatigue and any possible misunderstanding that our schools and areas of ministry are in competition for God's people's attention and support.

#### *Campaigns to individuals*

The WELS Conference of Presidents approves annual campaigns by WELS Christian giving counselors to individual donors. The 2016-17 "Every neighbor, every nation: WELS Missions and you" campaign to fund new missions initiatives involved 1,912 CGC visits resulting in more than 1,500 gifts totaling over \$727,000. Praise God for this generous response!

The 2017-18 campaign is for Michigan Lutheran Seminary, to gather funds for tuition assistance, capital projects, and reserve funds. As of early 2018, WELS Christian giving counselors have made 1,304 visits, including 223 joint visits with President Joel Petermann. Michigan Lutheran Seminary has received 651 immediate gifts totaling \$232,595. We're grateful to the Lord for his rich blessings on this campaign!

### *Appeals*

MCG works closely with our WELS areas of ministry and ministerial education schools to send about 14 mailed appeals and four e-appeals per calendar year. Each of the synod's four main areas of ministry is featured in two of the mailed appeals and one e-appeal. Two of the appeals each year promote charitable gift annuities with WELS Foundation. The appeals coordinate with other WELS media including *WELS Connection* and *WELS Connection Close-up, Forward in Christ*, WELS' websites, and the *Together* e-newsletter. In fiscal year 2016-17, Ministry of Christian Giving mailings helped facilitate \$999,623 in immediate support for WELS with an average cost per dollar received of \$.16.

### *IRA charitable distribution opportunity*

On December 18, 2015, Congress passed legislation to make permanent the giving opportunity known as the IRA qualified charitable distribution. With this type of gift, anybody 70.5 or older can make distributions from his or her IRA to charity tax-free for federal tax purposes. Over the last couple of years, MCG has worked to communicate this opportunity with our fellow saints via postcard mailings and counselor visits. WELS Foundation processed \$987,711 in qualified charitable distributions in 2017.

### *WELS endowment funds*

MCG is working toward building up \$300 million in WELS endowment funds for the benefit of ministerial education and missions. As of early 2017 the WELS endowments had \$24.6 million in immediate gifts with another \$58.2 million expected from deferred gifts arranged by donors working with Christian giving counselors. The 2017 distribution from these endowments totaled \$832,338, including \$459,670 to Missions and \$372,667 to Ministerial Education.

We also encourage gifts to the WELS Operating Endowment Fund, which as of the end of 2017 had a balance of \$1,705,687. In 2017 this fund distributed \$58,146 to WELS.

### *Marketing of planned giving opportunities*

At the suggestion of the WELS Foundation Board and through their generous financial support, WELS hired Sharpe Group to assess our current planned giving marketing efforts and create a five-year planned giving marketing plan to enhance our service to WELS donors and the long-term financial stability of WELS areas of ministry and WELS-affiliated ministries. Goals of the planned giving marketing program include increasing the number of known commitments to WELS ministry as well as seeing a growth in the number of matured (i.e., received) gifts in the coming years. The contents of this marketing plan—when thoroughly implemented—will positively affect the long-term revenues of WELS along with encouraging increased participation in ministry programs. In addition to increasing the number of planned gifts to WELS, Sharpe Group recommends regular nurture of the 3,200+ families who have previously arranged deferred expectancies with the assistance of our Christian giving counselors.

### *Development counsel to other organizations*

We annually offer development training to Christian giving counselors, ministerial education mission advancement staff, and anyone serving a WELS/ELS-affiliated ministry in development. One goal of such

training is to encourage a consistent approach to God's people that's Christ-centered and donor-sensitive, and that minimizes the impression that we're competitors or trying to "get" something from our fellow Christians. Twenty-two individuals participated in our 2018 training.

WELS parasynodical organizations can formally contract with MCG in a part-time "collaborative partnership" where our counselors proactively represent their organizations on visits with members. This allows both WELS and the parasynodicals to share their ministry stories with a broader audience of prospective partners. MCG currently has part-time collaborative partnerships with Arizona Lutheran Academy, Costa Maya Ministries, and Friends of China.

#### *Stewardship resources*

MCG encourages biblical stewardship through our e-newsletter *An Encouraging Word* and the latest stewardship program. The latest program was *Joyful Generosity*, a program of worship, Bible study, and personal devotion that will guide followers of Christ through the Bible's clear teachings on the management of our possessions. MCG also makes available to congregations an archive of past stewardship programs on WELS Cloud.

#### *Payment Card Industry compliance*

In order to comply with the latest security guidelines, MCG and the WELS Ministerial Education schools stopped collecting credit card information on paper forms in early 2017. Instead people are directed to submit credit card gifts online or to call so that a staff member can submit the gift online on their behalf. Such online entry involves no storage of credit card data and minimizes opportunities for its interception. This transition has gone smoothly.

#### *Ministry of Christian Giving Commission*

At the 2017 synod convention, the Constitutional Matters committee retired the MCG Commission since adequate oversight of MCG is provided through the Conference of Presidents. We thank all commission members who have served to help direct the Ministry of Christian Giving.

## **A look ahead**

Following are our goals and plans for 2018 and beyond:

- We will take a similar approach to communicating with congregations regarding 2018 CMO subscription setting, including personalizing a video and letter for each district.
- MCG will once again provide resources for congregations to hold a WELS Mission and Ministry Sunday, scheduled for October 21. The idea is to offer a traditional mission festival enhanced by worship, Bible study, and other materials provided by the synod. It is a chance to recommit ourselves toward the Great Commission locally and through the opportunities God is giving us as a synod. Any special offerings collected can go to the designation chosen by the congregation.
- Christian giving counselor Rev. Dennis Kleist will fully retire at the end of this year. We thank Dennis for his service to Jesus and his people with us! The Conference of Presidents will call

Dennis's successor in October. In addition, the COP called an additional full-time Christian giving counselor—authorized by the 2017 WELS convention—to start his work on July 1.

- WELS Christian giving counselors will conduct focused individual campaigns for Congregational Services in 2018-19 and Martin Luther College in 2019-21.
- We plan to continue encouraging gifts to WELS endowments with an annual appeal and counselor visits and presentations.
- Fully implementing the activities recommended by Sharpe Group will require the hiring of a full-time planned giving marketing coordinator in the MCG office. The planned giving marketing coordinator would be responsible for coordinating new and revised communications as well as targeting specific lists and analyzing results based on different approaches (market research and data analysis). The planned giving marketing coordinator would understand that these messages will be educational and inspirational rather than direct solicitations because those receiving the planned giving communications are already strong supporters of WELS. He or she would also assist with efforts to strengthen the database's capabilities in expectancy reporting and segmented planned giving donor communications, per Sharpe's recommendations.
- Our next WELS Christian Giving training for WELS/ELS advancement personnel will take place Jan. 9-11, 2019. Contact us to register or receive more information.
- WELS Ministry of Christian Giving, WELS Discipleship, and Northwestern Publishing House worked together to prepare and send a survey to parish pastors to learn the needs of congregations related to teaching stewardship. The results of the survey will guide the planning of the next stewardship program in 2019.

WELS Ministry of Christian Giving is privileged to serve God and you by helping to fund the ministries that touch the hearts of WELS members. We are happy that these gifts in response to Christ's love are helping us as a synod to fulfill our calling of proclaiming Jesus' name to more and more people.

*Rev. Kurt Lueneburg, reporter*