



Report of the Development Services Unit

Board of Trustees

The Church Council elects the trustees of the Endowment Fund Pooled Trust of the Evangelical Lutheran Church in America who also serve as advisors to the Development Services unit and the Foundation of the Evangelical Lutheran Church in America. The mission of the unit is to provide coordinated resource development activities (World Hunger, Global Mission Support, Fund for Leaders in Mission, Vision for Mission, etc.) and major gift and planned giving for all ministries related to the ELCA. The Endowment Fund Pooled Trust is a separately incorporated, Minnesota nonprofit corporation. Its sole purpose is to oversee the Endowment Fund Pooled Trust and to provide investment management services for endowment funds, funds functioning as endowments for all ministries of the ELCA. The ELCA Board of Pensions serves as investment advisor. The constitutional description of this unit appears in 17.40. and 17.41.B05. printed in Section X of this volume. The members of the board of trustees of the Endowment Fund Pooled Trust are:

Mr. Erick N. Anderson, Salina, Kan. (2011)
Pr. Marlene Whiterabbit Helgemo, Minneapolis, Minn. (2009)¹
Mr. Brian F. Hofland, West Harrison, N.Y. (2007)¹
Ms. Tonia J. Lindquist, *chair*, Gresham, Ore. (2007)¹
Pr. Richard W. Martyn, *secretary*, Fullerton, Calif. (2007)¹
Ms. Ann Sponberg Peterson, Decorah, Iowa (2011)
Mr. Fred B. Renwick, New York, N.Y. (2011)
Ms. Phyllis S. Youngdahl, Austin, Texas (2009)
Mr. George E. "Skip" Zubrod, Salem, Va. (2009)

Advisory Members

Ms. Christina Jackson-Skelton, *ELCA treasurer*
Pr. Donald M. Hallberg, *executive director*¹

¹Executive Committee

Report of Work 2005-2007

The Development Services unit oversees and directs efforts for major gift support of churchwide ministries. During the past biennium members of this church contributed \$37.7 million toward the World Hunger Appeal, and \$42.5 million for various domestic and international disasters. We can be proud of the ongoing work of the World Hunger Appeal on both the international and domestic scene. Aiding "marginalized people" and providing assistance toward sustainability, clean water, food for body and soul and advocating for just and proper societal actions. I urge you to review the *ELCA Good Gifts* catalog when you are planning to give a gift that makes a difference domestically and internationally. Contributions also can be made to "ELCA Good Gifts" online at the new and improved giving site (www.elca.org/giving). The ELCA Domestic Disaster Response provides a hundred cents on the dollar to a named disaster.

A total of \$7.7 million was given in support of Global Mission Sponsorship that aided this church in support of some 275 missionaries throughout the world. Gifts to the annual "Vision for Mission Appeal" of \$2.3 million and to the "Chilstrom Vision for Mission Endowment" provided additional support to all the ministries of this church. Contributions to the "Fund for Leaders in Mission" totaled \$3.1 million which provides support to students at our eight ELCA seminaries. The aforementioned is to name only some of the marvelous gifts in support of ministry that we do together over and above Sunday morning mission support.

The "Fund for Leaders in Mission," established by the 1997 Churchwide Assembly, continues to carry forward significant support of those preparing for rostered ministries at the eight ELCA seminaries. The Fund endowment balance reached \$15 million at the end of 2006. The first scholarships were awarded in 2000 and in total 200 have been awarded. ELCA seminary students have received full and/or partial tuition support for a total of \$ 2.2 million in scholarships across the eight ELCA seminaries.

Nineteen synods have entered into a partnership with the "Fund for Leaders in Mission" and established named synod endowments.

The primary objective of the Foundation of the Evangelical Lutheran Church in America is to motivate and educate the baptized of this church to extend their stewardship to life-long commitment and to all of our accumulated assets. The ELCA Foundation provides the opportunity for individuals to make major cash and deferred gifts to all identified ELCA ministries. Foundation gift planners are available to individuals and congregations and provide educational seminars on wills, estates, and gift planning in congregations and with other ministry expressions of the ELCA. Significant emphasis is placed on remembering the ministries of this church in one's will; the use of a final testament, a "Christian" preamble, and other opportunities such as: charitable gift annuities, charitable trusts, donor advised funds, gifting of stock, life insurance policies and the use of qualified retirement plans as gift vehicles.

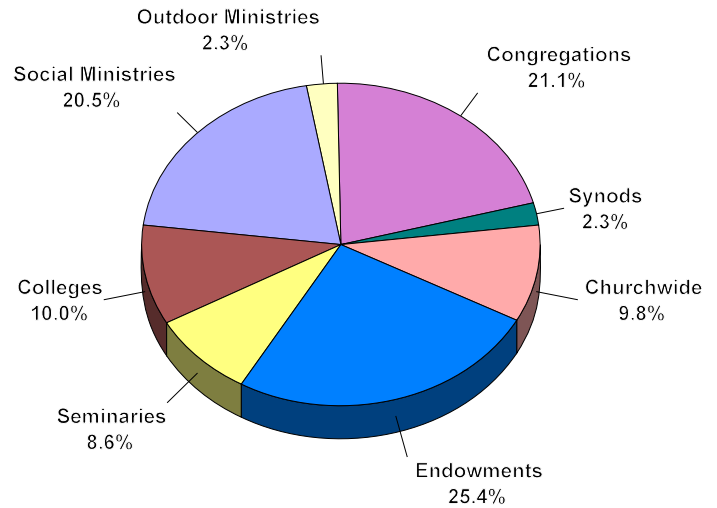
During the past biennium, members of the ELCA have made stewardship decisions regarding ultimate personal contributions, via the Foundation, totaling approximately \$63.16 million dollars. Other millions have been designated in wills that one day will support ELCA ministries in every expression of this church. At the conclusion of 2005 ELCA congregations had received 4,444 bequests for a total of \$74,657,068.

ELCA Foundation Gift Planners also work together with congregations in the establishment of congregational mission endowment funds using guidelines recommended by the ELCA

Foundation. As of November 30, 2006, the Endowment Fund Pooled Trust had \$309 million under management representing 1,425 various accounts. The Endowment Fund Pooled Trust provides professional management (Board of Pensions), and good stewardship for congregational mission endowment funds. Detailed suggested guidelines for a congregational mission endowment fund are available through the ELCA Foundation offices (see www.elca.org/fo).

Donald M. Hallberg, *executive director*

ELCA Deferred Gift Fund Charitable Beneficiaries
\$188 Million - Jan. 1, 2007



ELCA Foundation Year-End Report
Feb. 1, 2006 to Jan. 31, 2007

Planned Gifts	Number	FY2006	Number	FY2005
Gift Annuity 1-life	222	\$8,356,531.23	222	\$6,211,307.59
Gift Annuity 2-life	104	\$7,593,165.76	125	\$5,175,763.50
Deferred Gift Annuity 1-life	23	\$391,284.72	25	\$458,103.22
Deferred Gift Annuity 2-life	17	\$231,692.86	20	\$372,452.70
College Option Gift Annuity 1-life	7	\$139,870.00	9	\$105,113.60
Pooled Income Fund #2	0	\$347.70	0	\$419.62
Unitrusts	11	\$2,984,397.59	16	\$3,310,420.24
Annuity Trusts	0	\$0.00	1	\$180,000
Planned Gifts subtotal	384	\$19,697,289.86	418	\$15,813,580.47
LIP Death Benefits		\$684,000		\$631,000
Bequests		\$4,809,000		\$5,561,000
Outside Trust Payments		\$663,000		\$513,000
Gifts from Deceased subtotal		\$6,157,000		\$6,705,000
To Endowment		\$6,458,000		\$5,216,000
Outright/Pass-through Stock		\$779,227		\$1,493,664
Pass-Through Cash		\$248,885		\$137,215
Insurance Premiums		\$189,000		\$264,000
Outright Gifts subtotal		\$7,675,112		\$7,110,879
Grand Total		\$33,529,402		\$29,629,459