

Generosity Forward

Growing ministry through financial sustainability



Awakened

By Rev. Franz Rigert



Last Sunday I was awakened by the chirping of the birds. A warm spring evening finally allowed for open windows and fresh air!

In the year of the pandemic, many of our “awakenings” were not so sweet. Frightened awake by a virus that has now claimed over 3 million lives globally. Shaken by the reality of social isolation, economic shutdown and political tensions over masks and vaccines. Stirred by the Black Lives Matter movement, particularly considering the long litany of lives lost to police brutality. Startled by the reality of shuttered churches and challenging new technologies. Jolted by questions of keeping our congregations intact and garnering sufficient resources to carry on.

Yet we witnessed so many blessings! God’s grace became vividly apparent through the dedication of medical professionals, the diligence of frontline workers and the generosity of neighbors. While Zoom fatigue became our mantra, digital connecting was our social salvation. With vaccines readily available, there is a sense of hope and excitement in the air.

With the coming of Easter, we celebrated the resurrection story, and began to see the paradigm of restoration and renewal taking place in our own lives.

Recently our field staff gathered in person for the first time in a year! All fully vaccinated, we savored an amazing day of collaborative work and reconnecting. How we had longed for this!

Later, I took part in a backyard garden ceremony, with spring flowers bursting forth and birds singing sweetly as the breeze of God’s Spirit blew through the trees: a holy moment.

Ask yourself:

- Where do you experience God’s spirit awakening you?
- How do you experience God’s spirit awakening you?
- What will you awaken to in this new day?

Like the sprout destined to emerge from a dormant bulb, we are coming into a new season!

Generosity: What My Mother Taught me

By Rev. Robert Ullman

Herb Mather drew on over 100 interviews with generous people to write *That's What My Mother Taught Me*. Mather found many of us learned to be generous by the example of another. That is certainly true in my experience.



Anita, Otto and Bob Ullman

I grew up believing tithing to be an expression of faithful living and to see giving of one's time and talent to a wider community as equally important. While our family was not financially wealthy, I grew up with the privilege of never wanting for any of life's necessities. My parents displayed their generous spirits through giving back to their church, the wider church and their community. My mother's lessons for use of family resources came down to, "Give back to God first (a tithe), pay yourself next (save) and pay your bills last (spend)." If there wasn't enough left to pay the bills in a pay period, then my mother reevaluated the bills before short-changing giving or saving.

What I learned when my mother passed did not surprise me. In their estate documents, we discovered our parents designated a tenth of their accumulated assets to UCC-related institutions. My mother left a final lesson in generosity.

It is a simple model that my wife, Julie and I followed when we created a Living Trust for disposing of our assets upon our deaths. We have made provision in the Robert O. and Julie M. Ullman Trust for ten percent of the proceeds from our estate to be dispersed to UCC-related institutions and organizations. We trust that by sharing in word and deed the lessons we have learned and lived, others will be inspired to become generous givers as well.

Henri Nouwen once observed, "Thinking well of others and speaking well of others is the basis for generous giving. It means that we relate to others as part of our 'gen' or 'kin' and treat them as family." Nouwen's right in so many ways. And I would add that generosity not only treats others as family but expresses our gratitude for the family whose generosity shaped us.

Contact Andrew Warner at awarner@wcucc.org or 414-758-6233 to share your planned giving story or learn more about options for estate gifts.

Generosity Is an Act of Hope Thoughts on Planned Giving

By Emma K. Ledbetter

Like many congregations, my church often receives memorial gifts in honor of a person, or bequests from their estate. We place those gifts into the general Memorial Fund or an Endowment Fund of the congregation. Money can be designated for a specific project or fund that already exists. Money can then be requested from these funds for projects or activities. However, as an unwritten "rule," requests for money from the Memorial Funds have to be for projects as a one-time event. They are not to be used for funding a recurring program or project because "these should be included in the annual budget" of the congregation.

While I appreciate the thought behind these rules, I want to do something different with my own estate plan. I love my local church. The ongoing work of the congregation in all it does – not just new programs – has touched my life in so many ways. I want to support our church community and the way it continues to live out God's call. I want my gift to provide yearly general support to the church in all its work and missions.

So, I created a Plan of Continued Giving that is included in my will. There is a charitable bequest in my will for First Congregational UCC La Crosse intended for Budget Support. The letter that accompanies my will gives clear instructions on how I would like this money and memorial

contributions given in my name to be used. I want this money to be given yearly for the Annual Budget in the amount of my most recent pledge prior to my death. I have suggested they place the money in a separate fund managed by the Memorial and Endowments committee and continued until the fund and any earnings it has generated are depleted.

This gift honors my commitment to the congregation and its mission as long as my gift lasts. As a lifelong UCC member, I hope I can make a difference in the life of the church I love.

"I want to support our church community and the way it continues to live out God's will."



Kairos Call to Investment?

The Kairos Call to Action approved last year committed the Wisconsin Conference to taking meaningful steps towards creation care over the next ten years. We passed this resolution in response to the United Nations' compelling report on the need to reduce CO₂ emissions by 2030. Without action, millions around the world would face increased risks of droughts, floods, forest fires, and food scarcity.

The Kairos Call to Action recommended steps for progress include two that touch on finances:

- #5, becoming a carbon-neutral or carbon-negative congregation
- #6, investing in renewable energies

The Cornerstone Fund is partnering with the Wisconsin Conference to help congregations work on the Kairos steps.

"With this investment, we're leaning into the Kairos Call to Action," explained Andrew Warner, "because we want to help congregations make the urgent improvements needed to reduce our carbon footprints."

The Wisconsin Conference Board of Directors approved a deposit up to \$400,000 with Cornerstone's Creation Care Investment Program. "With this investment, we're leaning into the Kairos Call to Action," explained Andrew Warner, "because we want to help congregations make the urgent improvements needed to reduce our carbon footprints."

Learn more at:
 Cornerstone Fund – cornerstonefund.org
 Kairos Call to Action – wcucc.org/kairos



First, Cornerstone will make low-interest loans to congregations implementing capital projects focused on creation care. Maria Coyne, President of Cornerstone, explains, "When I think of the kinds of projects we want to fund, I think of our loan to Christ UCC in Dupo, Illinois, which enabled the congregation to install solar panels on its church and parsonage. Or our loan to Harmony Creek Church in Kettering, Ohio, to upgrade an old boiler with a much more energy efficient system."

Second, Cornerstone can make these loans because of deposits by individuals and institutions. Cornerstone will launch a new Creation Care Investment Program at General Synod this summer. Investors will deposit money with Cornerstone to be lent at a discounted rate. This is a practical way to invest in renewables and other creation-positive projects.

By Rev. Leanne Rose

Gifts at the ordination or installation of a pastor fund scholarship grants to Members-in-Discernment (lingo, MIDs) as they prepare for ordination. The Rev. Leanne Rose was ordained at Plymouth Church in Milwaukee and serves as the transitional interim at Emmanuel UCC in Dousman.

I put off my ordination in the spring of 2020 with the naïve thought that this COVID thing would just last a few weeks and we would be able to gather in the future together, to have the laying of hands, and the blessing of my ministry. But weeks turned into months and as the year drew to a close, I decided the time to hesitate was over. Planning was complicated: we had to limit the number of people in the building, get songs recorded ahead of time, and coordinate technology. There were times that the planning in the midst of the pandemic seemed more complicated than it was worth.

But, when the time arrived, while the church gathering was sparse with family and a few friends, the Zoom sanctuary was full. There were faces I hadn't seen in years, people who had walked beside me at different points in my life and who have since scattered across the country and around the world. These are the folks that wouldn't have been able to come in a "normal" year but could be part of my cloud of witness because we've been forced to do something different. Even the preacher was in Kansas!

We came up with a creative solution to the laying of hands and now I have a stole of handprints made from many in my life to carry their blessings with me. It was a different kind of ordination, and imperfect, but it was filled with love and support and gratitude from the cloud of witnesses who have been part of my life.

Generosity to the Scholarship Fund supported Leanne's journey from curious believer feeling the call to ministry to service today at Dousman UCC. Your generosity means that your heart is at every ordination in our Conference.

Support for Members in Discernment



Use Your Balance Sheet for Justice

By Rick Walters, Director, Corporate Social Responsibility, The Pension Boards-UCC, Inc.

The Wisconsin Foundation UCC invests funds of the Conference and Wisconsin congregations, primarily through Generations Investment Services (the endowment investment manager of the Pension Boards). Generations Investment Services brings UCC values to the table when making investment decisions. Rick Walters, Director of Corporate Social Responsibility for the Pension Boards-UCC explains what values-based investing means for the Pension Boards, the Wisconsin Foundation, and our partner congregations.

I am excited about **Generations Investments** because it offers the justice-oriented investor an opportunity to safely invest in a socially responsible way while, hopefully, not sacrificing returns. The investment strategy of Generations was born in 2015 when the **Pension Boards, the sponsor of Generations, adopted as its mission “operating at the intersection of Faith and Finance,”** defined as doing good for humanity and the earth while doing well for investors (and retirees in our pension plan). The intersection of Faith and Finance is that place where the values of faith, compassion, and justice meet and apply to financial obligations and opportunities, funding mission and growing assets. Those who want their assets to impact human rights and the environment, and not just earn more income, see the value in that approach.

But, how is this mission accomplished in Generations Investments? I can testify to the many ways that dollars invested responsibly can make a real difference. First, owning shares in a company gives investors the right and opportunity to influence corporate policy. Generations is a member of the Interfaith Center for Corporate Responsibility (ICCR), an ecumenical organization (PBUCC and UCF were founding members) comprised of over 300 multi-faith partners with over 300 billion dollars in assets under management, that strategizes and implements corporate change. Change like –

- the removal of firearms from Dick's Sporting Goods and other dramatic action in an anti-gun violence campaign.
- the retreat of Conoco Phillips from drilling in the Amazon when ICCR members challenged them based on the rights of Indigenous peoples living there.
- new safety protections for supply chain workers globally and meatpackers and migrant farmworkers in the US.

You can read more about our direct engagements with publicly traded companies we own at ICCR.org.



I was particularly moved when I had the opportunity to meet a tribal elder from the Standing Rock Sioux tribe to offer support and encouragement in their fight with DACA to prevent an oil and gas pipeline from disturbing tribal lands. He spoke eloquently in front of a hushed crowd of investors about the sacredness of the land and the peaceful protest and thoughtful response of tribal leaders to their crisis. Because of commitments in the Interfaith Center for Corporate Responsibility, we could meaningfully offer our support, encouragement and commitment to engage with companies involved in the project.

An additional strategy is direct investment through our bond program in women- and minority-owned businesses, health care in remote areas, alternative energy development and fair-trade. We invested in Covid relief efforts and in education and many other high impact social and human capital areas. We now have over 3 million dollars invested in Green and Social Sustainable Bonds.

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When a particular investment bears such an egregious risk that it cannot be sustained, we refrain from investing in it altogether. Examples of screens are for firearms, coal and tar sands, tobacco, and gaming.

Finally, we combine our voice with our ecumenical partners to speak out against injustice. We focus on issues raised by the United Church of Christ through General Synod Resolutions. Our calls for action have produced better healthcare for migrant workers, improved working conditions for meatpackers, increased disclosure of corporate lobbying, reduction in carbon emissions, and protection of rights for indigenous peoples.

Time and space prevent me from sharing more but I would love to talk with you or your congregation about our work and our faith commitment to a just world for all.

Generosity Forward Newsletter

Growing ministry through financial sustainability

Consider Investing with the Wisconsin Foundation UCC

Congregations started moving their investments over to the Wisconsin Foundation UCC in 2020. By combining our investments together in a single investment pool, each congregation benefits from the greater purchasing power and investment management. The key benefits of investing through the foundation are more than a lower fee (see Key Benefits). Last year, the foundation raised over \$56,000 for the congregations who partnered with the foundation. At the same time, the fees are competitive.



- A professional philanthropist helping you to raise new gifts to your congregation.
- Strong investment management aligned with our social values by the Pension Boards of the UCC.
- Externally audited and transparent financial reports.

To learn more about investing with the Wisconsin Foundation UCC, please reach out to Rev. Andrew Warner at awarner@wcucc.org.

wcucc.org/generosity

website at

Also find resources on our

wcucc.org

resourcecenter@

topics in this newsletter, email

For more information on the