



## Understanding UTO Funding

When the first thank offering was collected in 1883, the women were committed to seeing the work of UTO continue long after they were no longer leading the ministry. 140+ years later, the UTO Board is entrusted with overseeing the use of UTO funds to ensure the practice of gratitude continues to grow and that 100% of all funds donated to the Ingathering are given away. You might be wondering how the Board is able to create materials and distribute them for free and still give away all of the donations. With great gratitude, the work of the UTO Board is supported through a variety of trust funds started by the women of the church to ensure the work would continue. This document is a quick overview of all the funds that support the work of UTO along with some information about when and why they were created as well as how you can contribute to the trust funds that support the work of UTO.

### UTO has two categories of income:

1. **The Annual Ingathering:** This category includes donations and the interest they generate, trust fund income, and returned/unused grant money.
2. **The Annual Budget:** This category is funded solely through trust fund interest from three trust funds created to support the work of UTO. Individuals can contribute to the principal of the Memorial Trust Fund.

### The United Thank Offering has four (4) groups of Trust Funds associated with our work:

1. **Ingathering Income Trusts:** These trust funds were established by individuals to generate income each year for the ingathering.
2. **Ingathering Trust:** This account was created using returned or rescinded grant funds to generate income for the ingathering.
3. **Pension Trusts:** There are a few trusts that were developed to enable pensions and reference the Women's Auxiliary or United Thank Offering; how they are used is explained below.
4. **"Work of UTO" Trusts:** These are the trust funds that generate income to support the work of the United Thank Offering.

**Currently, UTO can only receive funds for two purposes: the annual Ingathering or contributions in thanksgiving or in memory of someone for the Memorial Trust Fund.** UTO leaders and members contribute regularly to the Memorial Trust to ensure the work of UTO continues for generations to come and that we can offer quality materials, events, and support for free to all our UTO leaders and members. To learn more about the Memorial Trust or to contribute to it visit <https://unitedthankoffering.com/memorial-trust/>

### Let's look at these four categories a bit more closely.

#### Ingathering Income Trusts:

There are 21 trust funds in this category, created between 1918 and 1968. Each was either created in memory of someone or as a donation from their estate. Here are the 21 people remembered each year because the interest from their trust is added to the Ingathering:

The Doughty Sisters, Central Pennsylvania, 1918  
Elizabeth Butler Barber, Bethlehem, 1923  
Rebecca Wain Shepherd, New Jersey, 1926

Mary E. Gibbs, Michigan, 1927  
Belle Holland Brady, Michigan, 1929  
Louisa B. Van Nostrand, New York, 1930  
Mary C.S. North, Pennsylvania, 1933  
Cora H. Wilkes, Michigan, 1937  
Ethan A. Nevin, 1938  
Women's Auxiliary, Diocese of Bethlehem, 1938  
Catherine B. Ogier, Pennsylvania 1942  
Sue H. Leake, Virginia, 1942  
Ida W. Soule, Massachusetts, 1944  
Alice Clara Smith, New York, 1948  
Florence S. Sullivan, New York, 1949  
Helen A. Sparkman, Newark, 1950  
Josephine A. Peterson, Chicago, 1954  
Gladys Van Deventer Baxter, New York, 1955  
Aileen Donnell, New York, 1955  
Susan Train Hand, New York, 1968  
Theodora C. Blodget, Pennsylvania, 1968

### **Ingathering Trusts:**

Trust Fund 1021.00 was created in 2008 when UTO had accumulated one million dollars of returned or rescinded grant funds so that the interest could contribute annually to the Ingathering. The fund was not utilized for almost a decade after the stock market crash so it could be rebuilt. During the pandemic, principal from this trust was used twice (2021 and 2022) to help stabilize the UTO Ingathering. This trust continues to stand at over a million dollars.

The Emery Fund for Missionaries was created in 1921 as a gift to honor the life of Julia Chester Emery on the 50<sup>th</sup> anniversary of the creation of UTO. This fund was established to support the care, education, and support of the women UTO sent as missionaries and it also cared for the UTO rooms at the Church Center where missionaries were welcomed and often housed while in New York. Since UTO no longer has space at the Church Center and we no longer send missionaries, this fund is granted annually alongside the annual grants to support those organizations that do send missionaries (currently Global Partnerships and Episcopal Service Corps) and the Archives of The Episcopal Church which cares for and makes available the archives of UTO.

### **Pension Trusts:**

In 1925, UTO created the Ida W. Soule Pension fund to care for UTO missionaries as they retired from service in honor of one of the women credited with starting UTO. UTO no longer has control of this trust, because at some point (we're not certain when) control of the proceeds of the trust was transferred from UTO to Executive Council.

In 1940 the Ednah H. Wheeler Trust was created to further support the needs of UTO workers by providing a pension for them. UTO no longer has control of this trust, because at some point (we're not certain when) control of the proceeds of the trust was transferred from UTO to Executive Council.

In 1952 the Virginia Wilson Trust was established to support the pension of UTO workers. UTO no longer has control of this trust, because at some point (we're not certain when) control of the proceeds of the trust was transferred from UTO to Executive Council.

### **"Work of UTO Trusts"**

There are three trust funds that make up the entire budget of the UTO Board and Staff. UTO will stop receiving funding from the General Convention Budget in 2025.

In 1951 Emilie G. Wright left her estate to continue the work of women in The Episcopal Church. Currently this trust is shared between Episcopal Church Women and UTO. The distribution must be approved by Executive Council. Currently, UTO only receives 29% of the interest from this trust.

In 1980, Margaret L. Willard created the Donald H. Bell Trust. It can only be used by the UTO Board for promoting the work of UTO.

In 1982, the UTO Committee saw the need to discontinue drawing funds from the Ingathering to pay for UTO materials. They spent a good deal of time fundraising for what is known as the Memorial Trust Fund. Today, the Memorial Trust funds the bulk of the work of UTO and is the only trust fund listed here that individuals can contribute towards. Each year, UTO members and leaders contribute to this trust in order to keep the work of UTO going and keep all of our materials free for individuals, families, congregations, and dioceses.

## Conclusion

As you can see, the legacy of the last 140 years continues to support the work of UTO today. While the work has changed, the core value of teaching about gratitude and supporting innovative mission and ministry remains the same. We give thanks for the individuals who had the foresight to contribute to the work of UTO by remembering UTO in their wills, and we hope you'll consider doing the same. You can find out how to support UTO in your will here:

<https://unitedthankoffering.com/remember-uto/>

Thank you for taking the time to learn about the funds that support the work of UTO. If you have questions, please reach out to our staff to find out more.