



**Report of the Director for the  
Freed to Lead Fund  
Indiana-Kentucky Synod  
Evangelical Lutheran Church in America**



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**Pastor Thomas Weitzel, Freed to Lead Fund**

**June 4 – 6, 2009**

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In September 2008, the Freed to Lead Fund was established in the Indiana-Kentucky Synod with a seed grant of \$741,000 from the Lilly Endowment to assist in the training and support of its rostered leaders by providing Scholarships for endorsed seminarians and Leadership Grants to rostered leaders for 1. Theological education debt, 2. Pension assistance and 3. Special circumstances that create undue financial burden.

The establishment of the fund came after a significant planning and grant application process that resulted in the grant award from Lilly Endowment to the Indiana-Kentucky Synod, one of 16 Indiana-based denominations receiving such a grant. The planning team consisted of seven volunteers and a half-time salaried Project Director. The entire planning experience, from first recruiting of the team in late 2007 to the initiation of the implementation phase in the fall of 2008 was not only positive, it was "can do." Each person asked to be on the planning team agreed to serve, and each person on that team agreed again to serve in the implementation phase after the grant was received. All members received tasks and met their deadlines with eagerness and insight.

THE PLANNING PROCESS began in January 2008 and included the following:

1. Monthly meetings from Jan.-June for planning, and again from Oct.-Dec. to set the implementation phase in motion.
2. Consultation in Feb. 2008 with the executive directors of the ELCA Foundation and the ELCA Fund for Leaders (seminary scholarship matching funds) about: A. Investing and endowing the implementation grant; B. Creating partnerships with the ELCA to fund a full-time developer position; and C. How to do fund raising without being competitive with the ELCA Fund for Leaders effort. The end result of that consultation was to establish a two track synod fund to address both sides of the seminary debt issue: scholarships for seminarians and debt retirement for rostered ministers.
3. An online survey of pastors and lay rostered ministers in Lent of 2008 to assess the economic challenges they are facing and the impact on their ministries. Out of 330 contacted, 82 responded, including 52 full time ministers, 5 part time, 9 retired, and 5 on leave or disability. The responses received were quite moving and have been used in publicity anonymously.
4. Sending planning team members to three grantees meetings sponsored by Lilly Endowment to mutually share the planning experience and ideas.
5. Raising awareness throughout the Indiana-Kentucky Synod of the issues being addressed by Lilly Endowment's invitation and grants, including: A. Five press releases from October 2007 through early January 2009 on progress and issues; B. A presentation to the Synod Council in April 2008 that included statements of pastors from the survey on their situation; C. A PowerPoint presentation at the Synod Assembly in June 2008 along

- with printed information included in assembly packets on progress, issues and pastors' statements; D. An article by the Project Director in the Epistle, a publication for ministers, in August 2008; E. Conversations at ministeriums as the Bishop visited them during Lent 2008; F. Regular email notification of rostered ministers on progress, and G. A letter to congregation presidents in November 2008 announcing the application process for ministers beginning in early 2009.
6. A Prayer Team was formed in May 2008 to pray for all phases in the planning and development of the Freed to Lead initiative.
  7. The grant proposal was submitted to Lilly Endowment July 1, 2008.
  8. With anticipation of a favorable reception of the grant proposal by Lilly Endowment, advertising began in July for the full-time Developer through synod-wide email communication, the Indiana University-Purdue University School for Philanthropy and the Association of Lutheran Development Executives. Advertising also began through synod email for Development Board candidates.
  9. A web page for the new Freed to Lead Fund was launched at the synod's website in August 2008 to assist with advertising, publicity and sharing issues ([www.iksynod.org/FreedtoLeadFund](http://www.iksynod.org/FreedtoLeadFund)).
  10. On August 1, 2008, the Project Director was called to serve half time on the Bishop's staff of the Indiana-Kentucky Synod ELCA as Director of the Freed to Lead Fund, again anticipating a favorable reception to the Implementation Grant Proposal.
  11. In September 2008, the Project Director became a member of the Presiding Bishop's Consultation on Seminary Debt in the ELCA, sharing the ongoing effort in the Indiana-Kentucky Synod to address similar issues.
  12. Upon reception of the Implement Grant in late September 2008, the Synod Council approved the organizing documents for the Freed to Lead Fund from the planning process and made the first appointments to the Development Board and the Grant Review Board of the fund from members of the Planning Task Force and the Seminary Candidacy Committee Scholarship Team.
  13. In October 2008, the Grant Review Board began its work to fine-tune the application process for rostered ministers and to develop appropriate forms, with a goal of advertising for applications Feb. 1, 2009.
  14. In November, interviews were held for the full-time Developer position and a candidate was hired. Joseph Skvarenina took up that position Jan. 20, 2009.

THE RESULTS of the planning were that every month from the reception of the invitation from Lilly Endowment in September of 2007 to submit a proposal through all of 2008 included some activity related to the planning, publicity and set up in Lilly's Economic Challenges Initiative. Most heart-warming of all was the fact that publicity efforts took hold and donations to the initiative began even during the planning phase and included offerings taken at ordinations of new pastors, so that the new Freed to Lead Fund was already established before the Implementation Grant was received from Lilly Endowment. Finally, it is a point of great pride among planning team members that the new fund will launch and begin receiving applications from ministers on Jan. 29, 2009, one month earlier than the time table submitted in the grant proposal to Lilly. This timing coincides with the beginning of the development effort, which began with the start of the Development Associate.

None of this could have happened without the dedication and foresight of the eight planning team members and Bishop James Stuck and his staff. Nor could it have happened without the invitation and encouragement of the staff of Lilly Endowment.

IN THE NEXT YEAR, the Freed to Lead Fund will set out to meet the financial challenges of rostered ministers and seminarians through:

1. A capital campaign beginning in 2009 with a goal of raising \$3.5 million in new money. Contributions to the capital campaign will be matched by the Lilly Endowment seed grant for Leadership grants and by the ELCA Fund for Leaders for Scholarships.
2. A grant application process that will require financial counseling for money management skill development and a financial plan for the applicant's future financial well-being.
3. Requiring congregations of all applicants to participate financially in addressing the financial challenge for which the application is submitted.
4. Financial counselors will also be made available to congregations to assist in money management skill development and good stewardship.
5. Fund administrators will be empowered to address and advocate for change to systemic issues that create the economic challenges that rostered ministers face.

WITH THANKSGIVING TO GOD, it is anticipated that the first awards from the Freed to Lead Fund to rostered leaders of the Indiana-Kentucky Synod will be announced at the 2009 Synod Assembly.

Submitted March 3, 2009 by

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Church in America  
God's work. Our hands.