

LILLY ENDOWMENT INC.



What will make your heart sing?

2009 NATIONAL CLERGY RENEWAL PROGRAM

*"O sing to the Lord a new song."*— Psalm 96:1

“ANYTHING GOOD USUALLY REQUIRES SOME TIME AND EFFORT. THIS IS ALSO TRUE OF THE CLERGY RENEWAL PROGRAM. I THOUGHT ABOUT STOPPING, NOT GOING THROUGH WITH IT. I FINALLY REALIZED THAT THE MORE I RESISTED FINISHING THE PROPOSAL, THE MORE I REALIZED THAT I NEEDED TO DO IT.”

### **Program Purpose**

Lilly Endowment seeks to strengthen Christian congregations by providing opportunities for pastors to step away briefly from the persistent obligations of daily parish life and to engage in a period of renewal and reflection. Renewal periods are not vacations, but times for intentional exploration and reflection, for regaining the enthusiasm and creativity for ministry, for discovering what will make the pastor’s heart sing.

Lilly Endowment believes ministry is profoundly important, not only to the people directly served, but also to the larger community and society. The clergy renewal program honors pastors and congregations. We have learned a great deal about what pastors and congregations value about this program. Some of those insights, in the form of comments from previous grantees, are included in this brochure to help clergy and congregations “think outside the box” in creating a time of refreshment and renewal.

Life-giving experiences — strengthening relationships, renewing a sense of call, meeting and serving the neighbor in a new way, finding joy and purpose in a simplified life, traveling to new lands and unfamiliar territories, creating opportunities where members of the congregation can exercise

their gifts for ministry — are common themes of these renewal times. Profound discoveries that pastors and their congregations describe as “life-changing events” occur as they participate in this program.

Pastors serve a variety of roles in their privileged position at the center of congregational life: preacher, teacher, spiritual guide, pastoral visitor, friend, confidant. The responsibilities are continual, and the pace and demands of parish life can be relentless, often leaving even the most dedicated pastors recognizing the need to replenish their own spiritual reservoirs to regain energy and strength for their ministry.

### **The Grants Program**

In the clergy renewal program, the Endowment will provide as many as 120 grants of up to \$50,000 each directly to congregations for the support of a renewal program for their pastor. The costs associated with family members who accompany a pastor may be included in the amount requested for the pastor. Up to \$15,000 of the grant may be used to help the congregation fulfill pastoral duties during the pastor’s absence and/or to support activities that enable the congregation as a whole to be renewed in its ministry.

### **Getting Started**

Please take time to read this brochure thoroughly, even if you have applied for a grant in the past. We recommend that those working with you on your proposal also should read the entire brochure, including the Note on page 18 and the Application Checklist on page 19.

“HAVING A THEME TO MY SABBATICAL WAS VERY HELPFUL; I WAS ABLE TO TRAVEL WITH A SENSE OF INTEGRATION AND PURPOSE.”

# What will make your heart sing?

2009 NATIONAL CLERGY RENEWAL PROGRAM

“WE BELIEVE THREE TO FOUR MONTHS IS A GOOD TIME PERIOD FOR A SABBATICAL. IT IS LONG ENOUGH TO GET INTO A DIFFERENT RHYTHM, BUT NOT SO LONG AS TO FEEL DISCONNECTED FROM THE CHURCH.”

The pastor and congregation will work together to design the renewal program. Both will agree on 1) the length of the program, 2) the pastor’s activities during the program, 3) congregational renewal activities that will take place during the pastor’s absence, and 4) how the pastor and congregation will share their experiences and insights with one another when the renewal leave is completed. The congregation will submit the proposal to the Endowment.

Clergy renewal programs may take many forms. No specific model is prescribed. Possible programs may include an uninterrupted period for reading and writing, directed research at a theological school, a study trip to religious sites or travel for other purposes in the United States or elsewhere in the world, quiet time for rest and prayer, special visits with family and friends. The possibilities are many. The best proposals combine several of these elements in a balanced and sensible way.

We have learned from previous grantees that the ideal renewal program is an uninterrupted time of three to four months.

Pastors may use up to \$2,500 for post-leave, follow-up personal counseling, spiritual direction, continuing education or fitness programs that might be an outgrowth of the clergy renewal experience. Post-leave activities are not intended to include vacations, conferences or congregational activities. Any congregational activities

should be described in question A-7 and the cost included in the congregation’s portion of the renewal budget.

## Eligibility Requirements

The Lilly Endowment National Clergy Renewal Program is a competitive grants program open to Christian congregations that have an ordained pastor who has an M.Div. degree from a theological seminary accredited by the Association of Theological Schools. The Endowment plans to award as many as 120 grants in response to the most outstanding applications submitted.

► Congregations in any of 49 states in the United States, Indiana excluded, may apply. (The Endowment administers a separate program for Indiana congregations.) The Endowment will not accept applications for renewal programs from clergy serving congregations in U.S. territories or protectorates, clergy serving military bases (whether in the U.S. or overseas),

or for chaplains in colleges, universities, hospitals or prisons.

► Any Christian congregation may apply for a clergy renewal program grant for any of its ordained pastors. A joint proposal may be submitted for husband-and-wife co-pastors. (Spouses serving different congregations may each apply

from the congregation they serve and may include each other, as desired, in the renewal program.) Congregations with multiple pastors who are not spouses may submit *one*

“IF A SABBATICAL’S PRIMARY GOAL IS RENEWAL, THERE NEEDS TO BE MORE PLANNED REST TIME. I REALIZED DURING THE FIRST TWO WEEKS THAT I HAD OVERBOOKED MY TIME. I INTENTIONALLY NEEDED TO PUT SOME TIME IN TO REST.”

**Lilly Endowment’s National Clergy Renewal Program for Christian congregations is for pastors who are serious about parish ministry and who can — in conversation and discernment with their congregations— envision this program as a means of renewing a long-term commitment to that congregation and to ordained ministry.**

“THE RENEWAL PROGRAM WAS LIFE-CHANGING. IT WILL GIVE SHAPE TO THE NEXT 10 YEARS OF MY MINISTRY AT THE CHURCH AND IN THE COMMUNITY. IT HAS ENLARGED MY VISION AND RENEWED MY CALL AND COMMITMENT.”

application for only *one* pastor per year. In such cases, a second grant cannot be considered until the first pastor has returned from renewal leave and the pastor and the congregation have fulfilled all reporting requirements. Congregations may not apply for a grant for a pastor who has previously received a Lilly Endowment clergy renewal grant.

- ▶ A pastor from an applying congregation must be a member in good standing of his or her denomination.
- ▶ The congregation must commit to continue the pastor’s salary and benefits during the renewal program.
- ▶ The pastor and an authorized congregational leader need to certify the pastor’s intent to remain in the congregation at least one year after completing the program.
- ▶ If you have any questions about whether your congregation or your pastor is eligible for this program, please contact Lilly Endowment before you submit an application.

#### Further Information

- ▶ Each congregation may request up to a total of \$50,000 to support the renewal program. Of that amount, up to \$15,000 may be used for congregational expenses associated with the renewal program; the remainder may be used for the pastor’s program expenses.
- ▶ The clergy renewal program is intended to be flexible. Although \$50,000 is the maximum grant amount, the Endowment has funded many clergy renewal proposals for lesser amounts. Each congregation is encouraged to apply for a clergy renewal grant that best fits its unique situation.
- ▶ The recipients in the National Clergy Renewal Program will be notified in October 2009.

- ▶ Activities funded by a grant in the clergy renewal program may begin no sooner than January 1, 2010, and must be completed by December 31, 2011. Grant funds must be expended within that time frame as well.
- ▶ An impartial panel will review the applications. Proposals will be evaluated in terms of the renewal program’s feasibility, coherence, creativity and potential benefits to the congregation and pastor. The size of the request will not be a determining factor unless—in the best judgment of the panel—the amount requested is inadequate or unrealistic to fulfill the renewal program described in the proposal.
- ▶ Lilly Endowment recommends that all applicants consult our pamphlet entitled *What Makes a High-Quality Proposal?* and a second document entitled *Grace Notes*. These documents provide wisdom and advice from previous grant recipients that will stimulate your creative thinking and offer helpful advice regarding the practical aspects of designing and submitting a proposal. Both pamphlets can be downloaded from the Endowment’s Web site, [lillyendowment.org](http://lillyendowment.org). You may also wish to read reflections that several previous grantees have written concerning their clergy renewal experiences. These can be found at the Web site: [www.resourcingchristianity.org](http://www.resourcingchristianity.org). From that site’s home page, where it says Search, enter National Clergy Renewal. Click on Clergy Sabbatical. (We encourage you to read these two overview articles.) When you click on either one of them, you will see a yellow arrow next to Clergy Sabbatical. Click on the arrow to get to articles by pastors who have taken sabbaticals. (The Endowment does not make available copies of previous successful clergy renewal applications.)

“IF YOU THINK YOU’RE TOO BUSY TO GET AWAY, YOU’RE BUSIER THAN YOU NEED TO BE. THE RENEWAL PROGRAM CAN HELP YOU UNDERSTAND THAT.”

# What will make your heart sing?

2009 NATIONAL CLERGY RENEWAL PROGRAM

“THE MOST PREVALENT IMPACT ON THE CONGREGATION WAS THAT WE BONDED BEYOND ANY EXPECTATIONS WE COULD HAVE HAD. BY WORKING TOGETHER AND INTENTIONALLY PUTTING GOD AND THE CHURCH FIRST, WE GREW AS ONE AND ACCOMPLISHED THINGS THAT WE WERE NOT SURE WERE POSSIBLE.”

- ▶ For a guide to planning clergy renewal programs, prospective applicants may be interested in reading *Clergy Renewal: The Alban Guide to Sabbatical Planning*, written by A. Richard Bullock and Richard J. Brueschhoff and published by the Alban Institute. Another helpful resource, also available through the Alban Institute, is *Journeying Toward Renewal* by Melissa Bane Sevier. Check the Alban Web site, [alban.org](http://alban.org), for information.
- ▶ The clergy renewal program is not intended to be a fellowship program for work toward an academic degree, including the doctor of ministry degree. It is acceptable for some part of the program to involve travel and research. However, if plans are strictly dedicated to work involved in pursuit of a degree, applicants are advised to find support elsewhere.
- ▶ The Endowment does not encourage the use of professional grant writers who are outside the circle of the congregation that is applying for this grant. Creating and writing the renewal proposal is intended as an occasion for joyful discernment and collaboration between the pastor and the congregation, even when someone within or close to the congregation assists in drafting the final product.

## Application Procedures

- ▶ New this year: Congregations applying for a clergy renewal program grant must submit a program narrative and all the forms in this brochure. The forms can be completed by filling them out on the pages in this brochure. *This year for the first time, you may go to the Endowment's Web site (click on National Clergy Renewal Program/Microsoft Word format) to*

*work on the forms from your computer.* You may save the documents and return to them until they are in final form. Then print out your final version and submit these forms with the rest of your application materials as described on pages 6-8 of this brochure. The forms may not be e-mailed or faxed to the Endowment. If requested information or signatures are missing, the application will not be reviewed or considered for an award.

- ▶ The completed application must include one original and three copies (total: four sets).
- ▶ Applications must be postmarked by May 14, 2009.
- ▶ The Endowment asks that you not call to verify receipt of your application. If you need confirmation of receipt, you may want to ask your mail service for such documentation.

## Application Elements

A completed application must provide all the information requested below. All application materials become the property of Lilly Endowment.

### Cover Page

Fill out the information requested using the Cover Page form provided. This should be the top page of your application. Please do not send a cover letter in addition.

### Signatures Page

Complete the Signatures Page that appears on the reverse side of the Cover Page. Be sure to copy it separately when making copies of your proposal.

“THE FACT THAT MY FAMILY MEMBERS ALSO COULD BENEFIT FROM THE GRANT WAS A GIFT TO OUR ENTIRE FAMILY AND HAS HAD LASTING BENEFITS IN TERMS OF MEMORIES SHARED AND HORIZONS EXPANDED.”

“IT IS CRUCIAL FOR THE PASTOR TO CONSIDER WHAT HE OR SHE HOPES TO ACHIEVE BY THIS EXPERIENCE. THE APPLICATION PROCESS HELPED ME TO THINK THIS THROUGH.”

### Proposal Narrative

Write a three-part Proposal Narrative that provides the information requested in Parts A, B and C on pages 6-7. The Proposal Narrative should take up no more than 10 typewritten, double-spaced pages with 1-inch margins using only one side of the paper, a readable font and type size (12 pt. Times New Roman). Be sure to number the questions (A-1, for example) and provide the information fully and in the order presented below. Number all pages consecutively. These pages should be placed after the Signatures Page when you submit your proposal.

#### Part A – Program Rationale and Design

1. Begin with a summary statement describing the overall character and purpose of the renewal program you are proposing. To present a strong application, please give careful thought to the connection between the proposed activities and your rationale. Programs that are coherent, well-integrated and possess a degree of thematic unity often are the most compelling. Your opening statement should convey these characteristics.
2. Provide a clearly articulated rationale for engaging in the clergy renewal program. Include a discussion about why this is an appropriate time for the pastor and congregation to participate.
3. Give a brief description of the process by which the congregation determined whether to submit a proposal. Favorable consideration will be given only to proposals that provide evidence of broad congregational support for the program.
4. In the body of your application present a thorough narrative

description of the pastor’s activities and timeline in the renewal program. Include a brief description and a rationale for each of these activities. This section is where you will give the fullest description of your plans and will enable the readers to see how the pieces fit together into a coherent whole. Use the attached Outline of Renewal Program form to list in sequence the proposed date(s) for each activity and the names of any family members or associates who will attend or travel with the pastor as a part of this program (see page 11).

5. Provide a statement written by the pastor that describes the intended benefits, both for the pastor and for the congregation, of the program as planned.
6. Provide a similar statement of intended benefits, both for the congregation and for the pastor, written by a representative of the congregation. This statement should summarize the congregation’s views and should be incorporated into the body of the proposal. Do not send separate letters from individual members of the congregation.
7. Describe the congregation’s plans for covering the necessary pastoral functions during the pastor’s absence, for celebration of the pastor’s leave-taking and return, and/or for programs or activities that will serve to renew the congregation as a whole. Up to \$15,000 may be used for such purposes and should be allocated as the congregation deems appropriate. (Note: These expenses should be included in the congregation’s budget for the renewal program.)
8. Tell us how the pastor and the congregation will communicate and share insights from the renewal program with one another.

“I THINK THE MOST SIGNIFICANT THING I HAVE LEARNED FROM MY RENEWAL EXPERIENCE IS HOW NECESSARY ARE LARGER BLOCKS OF TIME OFF IN ORDER TO NURTURE MY INNER BEING SO THAT I FEEL FIT AND HEALTHY INSIDE AS WELL AS OUTSIDE.”

# What will make your heart sing?

## 2009 NATIONAL CLERGY RENEWAL PROGRAM

“IT WAS A SPIRITUAL EXPERIENCE — ONE THAT LEAVES ME PERMANENTLY AFFECTED AND MARKED. I CAN NEVER HAVE THAT TAKEN AWAY FROM ME. IT HAS CHANGED WHO I AM: TO TRUST, RELAX, SHARE AND CELEBRATE MORE.”

### Part B – Congregational Information

1. Provide the date of founding and number of years at your present location. Describe any especially illuminating or distinctive historical events in the life of this church.
2. Tell us how many members you have and what your average worship attendance is.
3. Provide the names and tenure of the last four pastors.
4. List the ministries, both internal and outreach, in which your church is involved.
5. Include a one-page summary of the congregation's current annual budget. (This page need not be counted as part of the 10-page limit for the Proposal Narrative.)

### Part C – Pastoral Information

1. Tell us about the pastor's education (include only postsecondary through graduate school). Provide the name of the college and seminary from which the pastor graduated, degrees earned and the years in which the degrees were granted. Here, be sure to provide all the details that are requested.
2. Provide the pastor's date of ordination, the name of the ordaining body, and the tenure and places of previous pastoral positions. Also tell us how long the pastor has served this congregation.
3. Provide any other information about the pastor and his or her ministry, career and community involvements that may be helpful for the review committee to know.

### Outline of Renewal Program

Complete the form on page 11 and include it in your application following your Proposal Narrative. Do not include multiple

pages of detail. This form is only to capture dates and places, providing a quick snapshot of your intended program. Details should be given in answer to question A-4.

### Verification of Standing

Enclose a letter from the pastor's judicatory indicating his or her standing as a minister in his or her denomination. (Note: If the congregation is independent of any judicatory oversight, the governing board of the church should sign a letter attesting to the pastor's standing as an ordained minister in the congregation.)

### Renewal Program Budgets

The total budget for your congregation's clergy renewal program must not exceed \$50,000. Of that amount, up to \$15,000 is allowable for congregational expenses; the remainder may be used for the pastor's renewal program.

1. Using the enclosed Budget Worksheet for Pastor's Renewal Activities, provide a detailed budget for the pastor's renewal program. Attach a budget narrative that explains how all amounts were calculated.

Applicants may request funds to cover the cost of equipment and supplies needed in order to pursue the renewal activities described in the Proposal Narrative. The budget narrative should list the items requested and describe why they are essential to the renewal experience. Applicants are encouraged to make sure that the cost of such items is appropriate to their significance for the program and proportional in relation to the overall budget. (See *Grace Notes* at our Web site for further

“SPIRITUALLY, GOD SHOWED ME MANY THINGS I WOULD NEVER HAVE DISCOVERED WITHOUT A CHANGE OF ENVIRONMENT AND RESPONSIBILITIES.”

“NOBODY HAD TO SPEND A LOT OF TIME MAKING DECISIONS ABOUT HOW WE WERE GOING TO SPEND THE [GRANT] MONEY OR PROVIDE MINISTRY IN MY ABSENCE — IT WAS ALL THERE IN BLACK AND WHITE. A DETAILED PLAN PROVIDES A LOT OF FREEDOM FOR PEOPLE NOT TO WORRY.”

information and guidance.) Excessive requests will not receive favorable consideration. The congregation and the pastor should determine as part of their preparation of the grant proposal to whom equipment and supplies purchased with grant funds will belong (i.e., the pastor or the congregation) once the renewal program is complete.

The budget may contain an adjustment of up to \$5,000 to offset any additional income tax liability that will accrue to the pastor as a result of this grant. The budget may also include up to \$2,500 for possible post-leave follow-up expenses for the pastor’s continuing renewal (see page 3). Pastors and congregations are encouraged to think carefully and realistically about renewal expenses. Be sure that the amount requested is sufficient to cover all activities.

2. Using the enclosed Budget Worksheet for Congregational Expenses, provide a detailed budget that shows expenses the congregation will incur to fulfill pastoral functions during the pastor’s absence and support other appropriate activities (see page 6, Part A-7). Attach a budget narrative that explains how these amounts were calculated as well. This budget must not exceed \$15,000.

In your budget narratives, please be sure that you are specific about how you calculated each of the various line items for each of the two budgets. The pastor and the church treasurer should sign both Budget Worksheets.

### Tax Status Information

Complete the Applicant’s Tax Status form and attach the requested information concerning your congregation’s tax-exempt status under federal tax law. These documents should follow the budget documents in your application.

### QUESTIONS? NEED MORE INFORMATION?

Please contact the Endowment’s Web site: [lillyendowment.org](http://lillyendowment.org); call 317/916-7350; e-mail [clergyrenewal@yahoo.com](mailto:clergyrenewal@yahoo.com); or write to Program Director at the address below.

### Application Submission

Be sure to review the highlighted note on page 18 before you put your proposal in final form. The Endowment requests that all proposals be printed on one side only, then stapled or clipped. Please do not submit proposals in binders or any other kind of covering. Do not send additional attachments, brochures, pictures or other information. **A completed application must include one original and three copies (total: four sets) of all required materials.**

Use the Application Checklist on the inside back cover to make sure your application is complete.

Please return the completed application, with attachments, **postmarked by May 14, 2009**, to:

Jean M. Smith, Program Director, Religion  
Lilly Endowment Inc.  
2801 North Meridian Street  
Post Office Box 88068  
Indianapolis, Indiana 46208-0068

Recipients will be notified in October 2009.

“WHEN LEADERS EXPERIENCE RENEWAL, CONGREGATIONS ARE REENERGIZED, TOO. THINGS DON’T JUST RETURN TO NORMAL WHEN THE LEADER RETURNS. NEW PATTERNS OF LEADERSHIP EMERGE. NEW VISION SPROUTS UP.”

# Grant Application

The forms in this brochure can be downloaded from Lilly Endowment's Web site, [lillyendowment.org](http://lillyendowment.org) and click on Religion. Applicants may enter information directly onto the forms from their computers. However, the forms must be printed and mailed to Lilly Endowment with the other required materials. They may not be e-mailed or faxed.

## Cover Page (Please type or print clearly)

\_\_\_\_\_  
**Name of congregation** (please print official, legal name)

\_\_\_\_\_  
**Common name of congregation** (if different from legal name)

\_\_\_\_\_  
Street address

\_\_\_\_\_  
Mailing address (if different from street address)

\_\_\_\_\_  
City

\_\_\_\_\_  
State

\_\_\_\_\_  
ZIP code

\_\_\_\_\_  
Telephone number

\_\_\_\_\_  
Fax number

\_\_\_\_\_  
E-mail address

\_\_\_\_\_  
Employer Identification Number (EIN)

\_\_\_\_\_  
**Full name of pastor**

\_\_\_\_\_  
Home address

\_\_\_\_\_  
City

\_\_\_\_\_  
State

\_\_\_\_\_  
ZIP code

\_\_\_\_\_  
Home telephone number

\_\_\_\_\_  
Fax number

\_\_\_\_\_  
E-mail address

\_\_\_\_\_  
Cell phone number

\_\_\_\_\_  
**Name of authorized congregational representative**

\_\_\_\_\_  
Title or position in congregation

\_\_\_\_\_  
Home address

\_\_\_\_\_  
City

\_\_\_\_\_  
State

\_\_\_\_\_  
ZIP code

\_\_\_\_\_  
Home telephone number

\_\_\_\_\_  
Business telephone number

\_\_\_\_\_  
E-mail address

\_\_\_\_\_  
Cell phone number

\$ \_\_\_\_\_  
**Total amount requested**

(please see reverse side)

TEAR OFF

**Signatures Page**

**Signatures of Congregational Representative and Pastor**

I am duly authorized to submit this proposal on behalf of the congregation and affirm that to the best of my knowledge the information contained in the proposal is accurate. If a clergy renewal grant is awarded, the congregation commits to continue the salary and benefits of the pastor during the renewal program.

\_\_\_\_\_  
Signature of authorized congregational representative\*

\_\_\_\_\_  
Title

\_\_\_\_\_  
Signature of senior minister (if not the applicant)

\_\_\_\_\_  
Date

\* This signature must be that of the congregation's authorized lay leader (for example, clerk of session, senior warden, chair of parish council, president of the congregation) and not an employee of the congregation.

I believe that the information provided on this application is accurate. If a clergy renewal grant is awarded and the program is undertaken, I intend to serve this congregation for at least one year after the end of the renewal program.

TEAR OFF

\_\_\_\_\_  
Signature of pastor applying for grant

\_\_\_\_\_  
Title

\_\_\_\_\_  
Date

**Other Data** (Please complete each line)

\_\_\_\_\_  
Official name of denomination, if applicable. If nondenominational or independent, please indicate.

\_\_\_\_\_  
Date of founding of this congregation

\$ \_\_\_\_\_  
Annual operating budget total

\_\_\_\_\_  
Number of members

\_\_\_\_\_  
Average number at worship

\_\_\_\_\_  
Years pastor has served this congregation

Please tell us how you learned about this program:

friend/colleague    newspaper story    Web site (lillyendowment.org)    other Web site    direct mail

other \_\_\_\_\_



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**Budget Worksheet for Pastor’s Renewal Activities**

**Important:** Please enclose a **budget narrative** that explains how the figures were calculated and gives a complete explanation for each item or activity. Be sure the budget narrative specifically reflects particular activities, the number of people, and the amount of time that is covered by each budget item.

**Travel**

Airfare \$ \_\_\_\_\_

Car rental: mileage and gasoline \_\_\_\_\_

Other ground transportation \_\_\_\_\_

**Meals and lodging** \_\_\_\_\_

**Tuition or fees** \_\_\_\_\_

**Books** \_\_\_\_\_

**Telephone** \_\_\_\_\_

**Postage** \_\_\_\_\_

**Equipment and supplies** \_\_\_\_\_

**Other (passports, inoculations, entrance fees, etc.)** \_\_\_\_\_

**Set-aside for post-leave activities (limit \$2,500)** \_\_\_\_\_

**Estimated increase in tax liability as a result of receiving grant (maximum amount, \$5,000)\*** \_\_\_\_\_

**Total** \$ \_\_\_\_\_

**Signatures:**

\_\_\_\_\_  
Signature of Pastor

\_\_\_\_\_  
Signature of Treasurer

\*Pastors should work with the congregation’s treasurer to determine the potential impact of this grant on the pastor’s personal income tax. When determining the potential tax impact, note that the grant will be paid by Lilly Endowment to the congregation, not directly to the pastor. Please do not call the Lilly Endowment with questions regarding personal tax implications; it is not appropriate for us to give tax advice.

TEAR OFF

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**Budget Worksheet for Congregational Expenses**

In the space below, please provide a line item budget that addresses how the congregation will pay for the pastoral functions during the pastor’s absence. Be sure to include not only Sunday worship, but also other activities such as pastoral care, weddings, funerals, and so forth. Also address costs relating to the pastor’s leave-taking and return and/or costs related to congregational renewal activities.

**Important:** Please enclose a **budget narrative** that explains how the figures were calculated and gives a complete explanation for each item or activity.

**Pulpit supply and/or interim staff**

Honoraria \$ \_\_\_\_\_

Travel and lodging \_\_\_\_\_

Benefits \_\_\_\_\_

**Congregational events relating to pastor’s leave-taking and return**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Congregational renewal activities**

Please explain fully in proposal narrative, Part A, and in budget narrative.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Other**

\_\_\_\_\_

**Total** \$ \_\_\_\_\_

**Signatures:**

\_\_\_\_\_  
Signature of Pastor

\_\_\_\_\_  
Signature of Treasurer

TEAR OFF

[ This page is left blank intentionally. ]

**Applicant's Tax Status**

Lilly Endowment Inc. is required by federal tax law to determine the exempt status and foundation status of each organization to which the Endowment makes a grant. Therefore, it is necessary that you supply the following information to establish that your congregation is exempt from the payment of federal income taxes under Internal Revenue Code ("Code") section 501(c)(3) and is a church described in Code section 170(b)(1)(A)(i). Please complete and execute this form and attach the requested documents. Please feel free to address any questions regarding this form to Julie Siegler or Marge Spires at Lilly Endowment, 317/924-5471.

\_\_\_\_\_  
Legal name of organization

\_\_\_\_\_  
Common name used by congregation (if different from legal name)

\_\_\_\_\_  
Street address of congregation

\_\_\_\_\_  
City State ZIP code Telephone number

**Tax Status**

TEAR OFF

(a) If your congregation has an Internal Revenue Service letter determining that your organization is exempt from federal income taxes under Code section 501(c)(3) and a church described in Code section 170(b)(1)(A)(i), please attach a copy of the most recent letter.

(b) Many congregations will not have asked for or received such a letter from the IRS. If that is the case in your situation, then determine whether your congregation is listed in a group exemption ruling for your denomination. If so, please attach evidence that your congregation is covered by the ruling (for example, by sending copies of the directory cover and the page on which the congregation is listed in the official directory of your denomination).

(c) If your congregation does not have an individual exemption letter and does not fall under a denomination group ruling, please attach a letter that has been written and signed by legal counsel that verifies that your congregation is a church described in Code sections 501(c)(3) and 170(b)(1)(A)(i). For criteria to establish church status, see IRS Tax Guide for Churches and Religious Organizations (Publication 1828) at [www.irs.gov/charities/churches](http://www.irs.gov/charities/churches). Note especially page 23 of the publication.

**No grants will be awarded until the proper tax status is confirmed.**

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Title (must be responsible officer of the congregation)

\_\_\_\_\_  
Print name

### **Note to all applicants**

Lilly Endowment strives to give fair and thoughtful attention to each proposal submitted for this program. In order to do so, the proposals must be legible and comparable in length and sequence. Thus, the Endowment reminds pastors and congregations to be sure that their applications meet the minimum requirements noted previously and below.

#### **Proposals that do not meet the following standards will not be considered for funding:**

1. The complete Proposal Narrative includes Parts A, B and C and all questions are numbered.
2. For ease of readability, Proposal Narratives should be presented in 12 pt. Times New Roman.
3. Proposal Narratives must be double-spaced (not single-spaced or space-and-a-half) with no more than 23 to 24 lines per page with 1-inch margins.
4. Use only one side of the page.
5. The Proposal Narrative must not exceed 10 pages.
6. All forms should be those provided in this brochure or as downloaded from the Lilly Endowment Web site. Congregations using or creating other forms will not be considered for funding. Be sure that all six forms are those for the current year's program.

## Application Checklist

Is your proposal/application complete? Please follow this checklist to be sure:

- ▶ All six tear-off pages from this brochure or forms downloaded from the Endowment's Web site have been completed and enclosed:
  1. Cover Page with basic information about the pastor and congregation
  2. Signatures Page (Note: This page is on the reverse side of the Cover Page, so be sure to copy both sides of this page when preparing the required additional copies of the application.)
  3. Outline of Renewal Program
  4. Budget Worksheet for Pastor's Renewal Activities, signed by the pastor and treasurer
  5. Budget Worksheet for Congregational Expenses, signed by the pastor and treasurer
  6. Applicant's Tax Status form
- ▶ The proposal contains thorough and detailed responses to all questions asked in the instructions. The Proposal Narrative portion (Parts A, B and C) is double-spaced, with 1-inch margins, uses only one side of the paper, is printed in 12 pt. Times New Roman, and does not exceed 10 pages.
- ▶ Budget narratives that explain the calculations for each item in both of the program budgets are included.
- ▶ The most recent summary budget of the congregation is included.
- ▶ A letter verifying that the pastor is a minister in good standing in his or her denomination is enclosed. (Note: If the congregation is independent of any judicatory oversight, the governing board of the church should sign a letter attesting to the pastor's standing as an ordained minister in the congregation.)
- ▶ Four sets of the complete application (original and three copies) are enclosed.
- ▶ No binders, plastic folders or any other kind of covering are included. The application and its attachments have been secured with paper clips or staples.
- ▶ No photographs, brochures, articles or other such items about the pastor or congregation are included.

All applications become the property of Lilly Endowment, and none will be returned.

**On the cover (clockwise from top left):** The Rev. Linda M. McCrae, 2008 recipient of a clergy renewal program grant; the Rev. Martin E. Wright, 2003 recipient; the Rev. Martin Copenhaver, 2003 recipient; and the Rev. LaVerne M. Gill, 2003 recipient.

The Indianapolis-based Lilly Endowment Inc. was founded in 1937 by three members of the Lilly family through gifts of stock in their pharmaceutical business, Eli Lilly and Company. The Endowment – a private philanthropic foundation – is a separate entity from the company, with a distinct governing board, staff and location, and is devoted to the causes of religion, education and community development.

The Endowment supports a wide variety of efforts to enhance the quality of ministry in American congregations and parishes. It seeks both to honor the high calling of pastors currently serving local congregations and to provide opportunities for them to strengthen the capacities and skills they need for their ministerial work. Significant funding is provided as well to help identify, recruit, call and nurture into Christian ministry a new generation of talented pastors.

The Endowment also funds projects designed to promote informed dialogue about religion in American life, generate new knowledge, communicate fresh insights, and renew and sustain vital institutions of American Christianity.

