

Application Deadline for 2026-2027 School Year Scholarship is April 5, 2026. Trustees will review applications on April 9, 2026.

THE MERLE & PHYLLIS FRETTE SCHOLARSHIP Application (2026-2027 School Year)

ABOUT THIS SCHOLARSHIP

In 2021, Immanuel received word of a generous estate gift from Merle and Phyllis Frette. From this gift, Immanuel was directed to set-up an endowment fund which will provide for scholarship and mission funding in perpetuity. We are excited to offer this scholarship to active members within the Immanuel family, and the following lays out the intent, the process, and the standards for both a qualifying applicant and a qualifying educational institution.

SECTION 1: FRETTE ESTATE DIRECTIONS

Immanuel Evangelical Lutheran Church was a beneficiary of the Merle and Phyllis Frette Estate. In summary, the funds directed to Immanuel were designated to be used in the following way:

1. As an ongoing Endowment with protected principal
2. Invested to produce dividend income
3. Annual dispersion of dividend income for the following purpose:
 - a. 75% of funds designated for Post-Secondary Scholarships for active members
 - b. 25% of funds designated for New Mission/Missionary support
4. For reference, the Frette Estate exact wording is available in Appendix A.

SECTION 2: IMMANUEL GUIDELINES AND APPLICATION PROCESS

1. QUALIFYING APPLICANT

- a. Applicants are to be professing Christians, demonstrating an active faith in their personal lives, schools, workplaces, and community.
- b. ACTIVE MEMBER: Applicants are to be Active Members of Immanuel Lutheran Church
 - i. Per the Frette Estate guidelines, applicants must be “Active Members” of Immanuel Evangelical Lutheran church as defined in Immanuel’s Constitution and Bylaws. (C7.02 Section C)
 - ii. According to the Immanuel Constitution and Bylaws, a “member in good standing” is a baptized, confirmed, and voting member who has:
 1. **“during the current or preceding calendar year, shall have communed in this congregation and shall have made a contribution of record to this congregation.”**
 - iii. Furthermore, (C7.02.03) of Immanuel’s Constitution and Bylaws states:
 1. “The term “in good standing” shall be defined to include the following:

- a. **those baptized and confirmed members who partake of Holy Communion;**
 - b. **those baptized and confirmed members who contribute to the congregation treasury according to the congregation's record; or**
 - c. **those baptized and confirmed members who participate in the life and worship of the congregation.”**
- iv. Applicants who do not meet these requirements, per the Frette Estate's direction, will not qualify for a scholarship.
 - 1. Applicants who do not meet the above criteria are welcome and invited to re-establish their involvement at Immanuel and may be considered for future scholarships.
- c. For Qualifying Applicants attending schools or programs at a distance,
 - i. Applicants are expected to be active in their faith through participating in a local church, campus ministry, or similar organized Christian fellowship,
 - ii. Report on said involvement during the school year and/or on future scholarship applications,
 - iii. and maintain that commitment through the duration of their education or program and/or the scholarship cycle.
- d. Qualifying Applicants must provide verification of their acceptance to qualifying school / institution prior to receiving scholarship funds.

2. QUALIFYING SCHOOL/INSTITUTIONS

- a. Applicants should be applying for funds towards schools or institutions that are Post-Secondary in Nature:
 - i. Examples Include but are not limited to: College, Community College, Trade School, Seminary, Graduate School, Ministry Training Schools/Programs, Gap Year Programs
 - 1. Including certificate programs, continuing education, or other post-secondary offerings from the above examples.
 - 2. Including Online and On-Demand offerings from the above examples
- b. Scholarships are intended to fund tuition and tuition-related expenses and are not intended to apply to:
 - i. One-time Event/Conference fees
 - ii. Travel Expenses related to events or conferences
 - iii. Any other expense that is not directly handled via the qualifying school or institution

3. SCHOLARSHIP DISTRIBUTION AND FUND DETAILS

- a. Scholarship applications will be reviewed by the Trustees or a commissioned sub-committee

- b. Final decisions on who will receive scholarships, and the amount of the scholarships, will be made by the Trustees and such decisions will be reflected in the appropriate meeting minutes. Detailed records of scholarship awards will be kept and added to in future years.
- c. Scholarship Cycles
 - i. The main “cycle” for accepting Applications and awarding scholarships will be oriented to a September-May School Year.
 - ii. Additional consideration will be given to applications outside of that cycle based on availability of funds.
 - 1. Example A: Susie is beginning college in January.
 - 2. Example B: Susie is enrolling in a ministry training program
 - 3. Example C: Susie is beginning an on-demand online certificate program
 - 4. Example D: Susie is enrolling in summer classes
 - iii. A portion of the funds will be available for scholarships towards lower-cost training programs, certificate programs, or similar offerings from schools or institutions consistent with the “Qualifying School / Institution” section in this document.
 - 1. Example A: Susie is enrolling in a 6-month, 6-credit certificate program
 - 2. Example B: Susie is a part-time student with low tuition expenses
 - 3. Example C: Susie is enrolling in a lower-cost ministry training, ministry certificate, or leadership program
- d. Scholarships will be awarded at similar amounts equal or greater to \$1000 each cycle.
- e. The first two-thirds of the total scholarship funds each cycle will be set aside for traditional college and university scholarships. The remaining one-third will be left for lower cost training programs, certificate programs, or similar qualifying programs that do not follow the traditional September - May school year.
- f. Scholarships will be paid directly to the School / Organization at which the applicant is attending. Appropriate mailing information may need to be provided by the Qualified Applicant.
- g. Retention of Unused Funds
 - i. Unused funds for a scholarship cycle will remain liquid in the fund for off-cycle applications and for availability in the next cycle for the purpose of potential recurring scholarships for further academic years.
 - ii. Unused funds exceeding \$50,000 may be rolled back into the Frette Endowment at the discretion of the Trustees.

4. APPLICATION PROCESS

- a. Applicants must complete the provided application form which will include, but not be limited to:
 - i. Name, Permanent Address, Phone, Email

- ii. Church Information
 - 1. Are you an “active member” of Immanuel, per the definitions of the Constitution and Bylaws quoted above in the “qualified applicant” section?
 - a. Per the Frette Estate requirements for this scholarship, records will be consulted on Immanuel’s end to confirm this.
 - 2. Confirmation Year - If you were not confirmed at Immanuel, please share your previous church history.
- iii. School / Institution Attending, including website information and mailing address for payments
- iv. Planned Degree / Certification / Training Program
- v. Anticipated Completion / Graduation Month, Year
 - 1. Anticipated annual costs of program OR Anticipated total cost of training or certificate program.
- vi. Acceptance Letter, Email, or other verification of acceptance and enrollment to a qualifying school / institution
- vii. ESSAY
 - 1. Please attach an essay explaining how you have been an active member of Immanuel Lutheran Church in the past two years and how involvement at Immanuel has impacted your faith journey. If you are a recurring scholarship applicant and are unable to attend Immanuel due to distance, please describe how you have been active in your community the past two years and how that has impacted your faith journey.
 - 2. Essays and completed applications should be typed and submitted to: Lead/Senior Pastor, Immanuel Board of Trustees, or the Immanuel Church Office.

APPENDIX A - MERLE & PHYLLIS FRETTE SCHOLARSHIP APPLICATION ESTATE LANGUAGE

E-FILED 2021 JAN 27 2:34 PM STORY - CLERK OF DISTRICT COURT

LAST WILL AND TESTAMENT

MERLE S. FRETTE

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The church board of Immanuel Evangelical Lutheran Church should understand the income paid pursuant to this provision of my Will is not intended to replace or be a substitute for Immanuel Evangelical Lutheran Church's own benevolence and missionary obligations. Rather, Immanuel Evangelical Lutheran Church's board, and its members, should understand that the intent of this gift is to provide funds in excess of what Immanuel Evangelical Lutheran Church would normally be able to provide for mission work.

If the Iowa courts should make a determination that this portion of Article VII (1) violates the rules against perpetuities or in the event the Immanuel Evangelical Lutheran Church Foundation or its successor in interest ceases to exist or said entity declines to serve as trustee, then the income, as well as any funds pursuant to this paragraph to create that income, shall be distributed to Immanuel Evangelical Lutheran Church of Story City, Iowa.

2. The remainder of the income, consisting of three-fourths (3/4) of the income of this trust, shall be used for post-high school scholarships so that confirmed and active members of Immanuel Evangelical Lutheran Church, Story City, Iowa, or its successors in interest, can continue their education beyond high school. The Board of Trustees of Immanuel Evangelical Lutheran Church, Story City, Iowa, shall determine the necessary rules and regulations for members of Immanuel Evangelical Lutheran Church, Story City, Iowa, who qualify for scholarships from this fund. However, said qualifications shall not limit members to attend church affiliated schools. It is the intent that attendance by members in either private schools, public colleges, universities, junior colleges, trade schools, or graduate schools can all qualify for this scholarship. The Board of Trustees shall require that each applicant for the scholarship prove that they have made satisfactory progress towards their degree or certificate in the preceding year in order to qualify for subsequent scholarships. It is my desire that all scholarships be of approximately equal amounts. The scholarships shall be paid directly to the educational institution that the student is attending.

If the Iowa courts should make a determination that this portion of Article VII (2) violates the rule against perpetuities or in the event the Immanuel Evangelical Lutheran Church Foundation or its successor in interest ceases to exist or said entity declines to serve as trustee, then the income, as well as any funds used pursuant to this paragraph to create that income, shall be distributed to Roland- Story School District Foundation for scholarship purposes.