Welcome!
Agenda

1. National Fund Overview
2. Program Components
3. Application Process
4. Q&A
National Fund Overview
Introduction

Funded by Lilly Endowment Inc. to support 200+ congregations through 2027

Since 2016, we’ve awarded $18 million to 97 congregations representing 24 denominations across 38 states/territories

In 2022, we received 365 LOIs and funded 16
The National Fund Program

in collaboration with

Partners for Sacred Places

National Trust for Historic Preservation®
National Fund Team

Partners for Sacred Places
- Bob Jaeger, President
- Gianfranco Grande, Executive Vice President
- Rachel Hildebrandt, Director of the National Fund for Sacred Places
- Emily Sajdak, Senior Project Manager

National Trust for Historic Preservation
- Jennifer Sandy, Senior Field Director, Preservation Services & Outreach
- Ann Phillips, Preservation Architect
- Emily Kahn, Program Coordinator
- Nicole Vann, Director of Grants and Awards Programs
- Diana Maxwell, Senior Manager of Grants
Advisory Committee Members

- Barbara Abrajano, Director of Development and Community Engagement, East-West University
- Alice Antonelli, Director, Nonprofit Finance Fund
- Rabbi Michael Balinsky
- The Rt. Rev. Jennifer Baskerville-Burrows, Bishop, Episcopal Diocese of Indianapolis
- Stephanie Boddie, PhD, MSW, Assistant Professor of Church and Community Ministries, Baylor University
- The Rev. Dr. Christopher Coble, Vice President for Religion, Religion Division, Lilly Endowment, Inc.
- Mark Constantine, President and CEO, Richmond Memorial Health Foundation
- Marsh Davis, President, Indiana Landmarks
- The Rev. Katie Day, PhD, Charles A. Schieren Professor Emerita of Church and Society, United Lutheran Seminary
- The Rev. Dr. Thomas E. Frank, President, Heritage Conservation Carolina & Retired University Professor, Wake Forest University
- Christopher S. Hunter, PhD, Assoc. AIA, CSI, CDT, Assistant Professor, School of Architecture, Mississippi State University
- Catherine Lynch, Development Specialist, Presbyterian Church (USA) Investment and Loan Program
- The Rev. Katherine Glaze Lyle, Retired Clergy Member, North Texas Annual Conference, The United Methodist Church
- The Rev. Dr. Tito Madrazo, Program Director, Religion Division, Lilly Endowment, Inc.
- Ariana Makau, President & Principal Conservator, Nzilani Glass Conservation
- Jorge Rigau, FAIA, Architect, Arquitectos PSC
- Edward Torrez, RA, AIA, LEED AP, NCARB, President and Principal, Bauer Latoza Studio
- The Rev. Robb R. Webb III, Director of the Rural Church Program, The Duke Endowment
1. Group training
2. Pro bono technical assistance
3. Planning grants – Up to $10,000 (no match required)
4. Capital grants -- $50,000-$250,000 (matching grant)
Typical Program Timeline

Target of 2 years
(November 2023 – October 2025)

APPLICATION

Training, Intake Call
Planning Grant Submission (optional), Planning Grant Disbursement (if applied)
Technical Assistance/Consultation, Preliminary Site Visit
Mid-program Evaluation

PROGRAM

CAPITAL GRANT REQUEST

Construction Complete, Matching Funds 100% Raised
Final Report Submission, Final Site Visit, Final Disbursement of Grant Funds

COMPLETION
Group Training

- National Fund refresher
- Making your case for support
- Capital project planning
- Community-wide fundraising
- Friends groups/supporting organizations
Technical Assistance

• Case Statement Review
• Economic Halo Effect Study
• Community Engagement
• Communications Services
• Architectural Services Assistance
• Fundraising Mentorship w/ Senior Staff
Planning Grant

Up to $10,000 for

• Conditions assessments or architectural design services
• Capital campaign consulting services
• Creation of marketing materials, including video

From Survey to Scope

by Shari Goldberg

The benefits of a conditions survey have been issued commodity in these pages. It’s an objective assessment of the building, it provides a way to understand the building’s most pressing problems, and, in some instances, it can be used to provide guidance for a master plan. The core of any congregation would be glad to have it in its possession.

Still, a conditions survey must be interpreted—by both the congregation and an architect—before expenses can be undertaken. The survey document outlines suggestions, goals, and methods for building repair and renovation. Yet it does not include plans and specifications, which define the materials, techniques, and drawings to be used for each repair. Without these details, a contractor won’t be able to interpret the architect’s suggested work. In addition, while the conditions survey may label the most urgent of the repair projects, it does not specify in exactly what order to do them, nor does it set out a fundraising plan.

After the survey has been completed, most architects (or building conservators or engineers, depending on who has been hired to perform the survey) will advise the congregation about sequencing repairs according to the funds available and capital campaign plans. These meetings or conversations are usually conducted at the architect’s or engineer’s office. Many require additional meetings to clarify what’s urgent. The architect and engineer must present the projects like this: a list of conditions and possible repairs, along with plans and specifications. However, congregations must hire an architect with an additional contract. These pre-construction, pre-construction procedures require significant commitments of time and funding, it is important that congregations plan for them before purchasing a conditions survey.

Step 1: Planning

One of the main advantages of the conditions survey is that it gives congregations an opportunity to see all of the repairs they will eventually need to undergo, not only the most obvious problems. But planning to complete all of the architect’s recommendations can be daunting. By designating phases, the congregation will be able to develop a long-term plan that incorporates each project.

A conditions survey recommends lots of capital projects the congregation and the architect work to develop a phased plan for completing them.

The architect who completed the conditions survey will often assist the congregation in designing work phases. Walter Sedoric of Walter Sedoric Architects in Livingston-on-Hudson, NY, has several such surveys in a typical conditions survey contract. “We like to have the religious leaders, the building committee, and the congregation present,” he said. “This clarifies what’s urgent. Then the building committee usually comes back to us, and together we develop a plan for phases.” He clarifies that his firm then works to develop a schedule, setting out several phases with anticipated dates of completion.

Please should be thoughtfully designed. In addition to urgency, congregations must consider fundraising prospects, programmatic needs, community support, and in-house capabilities. For instance, at St. Stanislaus-Kostka Church in Rochester, NY, the congregation undertook a survey anticipating that its tower would require urgent attention. “The tower was deteriorated and it looked like a forbidding wall,” recalled Kathleen Urbanik, chair of the Church Renovation Committee. The church’s architect, Bero Associates, confirmed Planning Grant

FROM SURVEY TO SCOPE

A conditions survey recommends lots of capital projects the congregation and the architect work to develop a phased plan for completing them.
• **What is a Building Conditions Assessment?**
  A report commissioned from an architect, engineer, or other specialist that assesses a building’s condition, identifies issues, and presents a list of prioritized recommendations.

• **What is its purpose – why do you need it?**
  ○ Critical “check-up” for historic buildings
  ○ Assess building holistically
  ○ Diagnose the origins of any pre-existing issues
  ○ Explore repair and renovation options **before** the design phase

• **Do you have a Building Conditions Assessment?**
Capital Grant

- $50,000-$250,000

  Requires a match…
  
  1:1 for $50,000 - $100,000 grant
  2:1 for $100,001 - $250,000 grant

- All matching funds must be new money raised after entry into the program
Types of Eligible Matching Funds

• Gifts from individuals, foundations, or corporations
• Government grants
• Proceeds from the sale of stock or real estate
• Matured bequests
• Events and fundraisers
• Donated materials and professional services (up to 20%)
To receive the first 50% of the funds the following benchmarks must be met:
- ¼ of the match raised
- Construction-ready drawings and specs describing National Fund scope of work
Construction cannot begin on the National Fund Scope of Work until our team has approved your capital grant application.
Eligible Projects

The National Fund supports congregations undertaking significant repair and restoration projects involving:

• Foundations, roofs, masonry, windows, gutters and downspouts
• Towers and domes
• Mechanical systems
• Life safety and fire suppression systems
• ADA accessibility projects
Ineligible Projects

- Demolition of character-defining architectural features
- Purchase or lease of property
- New construction
- Landscaping or fencing
- Cemeteries
- Parking lots
- Religious art restoration (such as mural restoration)
- Pipe organ restoration or replacement
- Pew restoration or replacement
- Purchase of Audio-Visual equipment
- Solar panels
Application Process
Application Timeline 2023

- **January 11**: LOI Opens
- **February 24**: LOI Due
- **June 16**: LOI Notifications
- **July 14**: Full Applications Due
- **Mid-October**: Final Notifications
Basic Eligibility

- Must be located in the United States or its territories
- Must be owned by an active congregation (or held in trust by denominational body)
- Applicant must be a congregation or closely affiliated nonprofit
- If applicant is a congregation, it must be at least 3 years old
Evaluation Criteria

- Historic, Cultural, or Architectural Significance
- Community-Serving Congregations
- Project Scope and Need
- Readiness
- Healthy Congregations
- Strong Applications
Successful applicants are able to demonstrate their place in history by answering questions such as:

- Does the building tell a story relevant to our history – either cultural or religious?
- Is the building the work of an architect? If so, is it a high quality or a good example of their work?
- Is the building an exceptional example of its style or type?
- Does the building have a great physical presence in its community based on its siting/location?
We’re looking for congregations that:

• Operate and host programming that serves vulnerable and at-risk populations
• Share space with non-affiliated groups and organizations (often at subsidized rates)
• Partner with other congregations, faith-based organizations, nonprofit organizations; and/or municipalities
• Have a widespread reputation for being a welcoming center of community life
We fund historic preservation projects that address urgent repair needs or life safety. We also fund projects that increase congregations’ ability to open their buildings to new populations or to serve greater numbers of folks. All projects must adhere to the Secretary of the Interior’s Standards for Rehabilitation, which is a universally accepted framework for doing work to older and historic properties.
Readiness

We’re looking for congregations that:

• Understand their buildings’ needs
• Are ready to undertake a capital campaign
• Have a realistic fundraising goal
• Have some prior experience
• Are proactively advancing their projects
The National Fund prioritizes healthy, stable congregations so that our investment is truly impactful and lasting. We look for the following:

- Tenured, well-respected clergy; capable lay leadership
- Stable or growing membership;
- Financial strength and stability;
- Support of the judicatory or governing body (if applicable)
- A history of weathering challenges with resilience
Strong Applications

The National Fund is a very competitive program, so we urge our applicants to put their best feet forward. Applications should:

- Be completed in full with all required attachments
- Make a compelling case for support
- Clearly articulate the project’s goals and components
- Include high quality, high resolution photographs that help us to fully appreciate your building(s)
Location of the LOI

Application Deadlines & Process

Applications for the National Fund for Sacred Places are accepted annually. Typically, 12-15 congregations that meet all of the eligibility requirements and exemplify the core criteria are awarded entry into the program in October. All application submission steps take place through our online grants management system, Foundant.

Letter of Intent Launched
January 11, 2023

Letters of Intent through the Foundant grant system will be accepted from any eligible congregation.

Letters of Intent due February 24, 2023 at 11:59PM EST

Full Application Notifications
May 2023

After careful review, a select number of congregations will be invited to complete a full application through the Foundant grant system. Full applications will be due in July.

Have questions? Register for an informational webinar on February 1.

Final Notifications
October 2023

Final decisions will be made with the Advisory Committee, and congregations will be notified in October.

fundforsacredplaces.org
Location of the LOI
**Location of the LOI**

<table>
<thead>
<tr>
<th>National Fund for Sacred Places 2022</th>
<th>Accepting Submissions from 01/18/2022 to 03/07/2022</th>
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The National Fund for Sacred Places (the National Fund) is a program of Partners for Sacred Places in collaboration with the National Trust for Historic Preservation. The National Fund provides:

1) grants for the planning and execution of urgent capital projects at historic sacred places that are valued for their cultural importance as well as their role in providing human services, strengthening communities, and revitalizing neighborhoods; and
2) training, capacity-building, and technical assistance to ensure that grant-funded projects are successfully planned and implemented.

Please visit the National Fund’s Eligibility page before starting an application. To begin the process, click the "log on" button in the upper right hand corner of this screen. As a first step, you will be asked to complete a Letter of Intent (LOI). To preview the LOI questions, click the "preview" button below.

Letters of Intent for the 2022 cohort of participants are now being accepted, and are due March 7, 2022 at 11:59 p.m. local time. For more information visit fundforsacredplaces.org.
Add Collaborators
How to Submit the LOI

[Screen shot of application form]

- Non-Profit Partner
- Significance
- Congregation
- Finances
- Community Engagement
- Fundraising Plan
- Project
- Additional Photos
- Certification

[Button] Submit Application
Contact Information

Partners for Sacred Places
Rachel Hildebrandt
rhildebrandt@sacredplaces.org
(215) 567-3234, x21

National Trust for Historic Preservation
Grants Office
grants@savingplaces.org
(202) 588-6353

Deadline:
February 24, 11:59 PM EST
Thank you!