2023

Welcome!

NATIONAL FUND FOR SACRED PLACES

A program of Partners for Sacred Places in collaboration with the National Trust for Historic Preservation

Agenda

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

2023

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

Partners for Sacred Places

in collaboration with

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

2023

Program Components

National Fund Program Components

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)

NOV. 2023 | DEC. 2023 | JAN. 2023 | FEB. 2023 | MAR. 2023 | APR. 2023 | MAY 2023 | JUN. 2023 | JUL. 2023 | AUG. 2023 | SEP. 2023 | OCT. 2023 | NOV. 2023 | DEC. 2023 | JAN. 2024 | FEB. 2024 | MAR. 2024 | APR. 2024 | MAY 2024 | JUN. 2024 | JUL. 2024 | AUG. 2024 | SEP. 2024 | OCT. 2024

APPLICATION →

Training, Intake Call

Planning Grant Submission (optional), Planning Grant Disbursement (if applied)

Technical Assistance/Consultation, Preliminary Site Visit

Mid-program Evaluation

→ **CAPITAL GRANT REQUEST** →

Construction Complete, Matching Funds 100% Raised

Final Report Submission, Final Site Visit, Final Disbursement of Grant Funds

PROGRAM

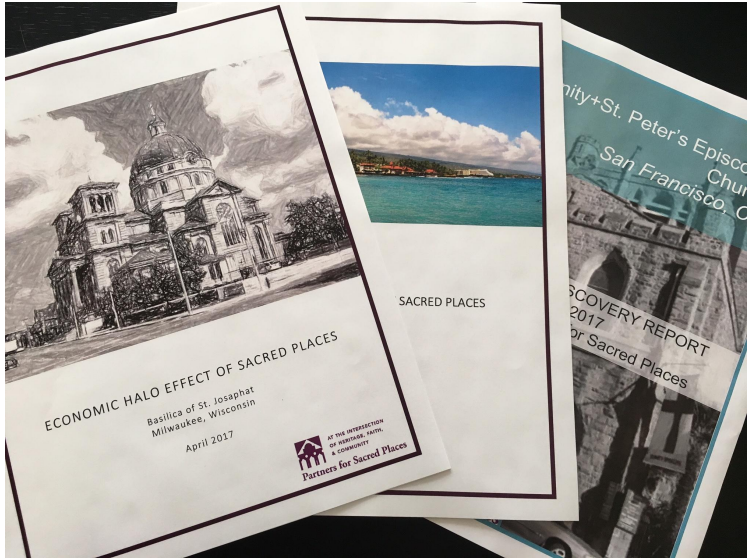
COMPLETION

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

<u>Up to $10,000 for</u>

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

From Survey to Scope

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

by Shari Goldberg

The benefits of a conditions survey have been touted extensively in these pages. It's an objective assessment of the building, it provides a way to understand the building's most pressing problems, and, as cost estimates are usually included, it can be used to set fundraising goals. It's a document that any congregation would be glad to have in its possession.

Still, a conditions survey must be interpreted—by both the congregation and an architect—before repairs can be undertaken. The survey document outlines suggestions, goals, and methods for building repair and restoration. 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 included in the original conditions survey contract. To obtain plans and specifications, however, congregations must hire an architect with an additional contract. These post-survey, 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: Phasing

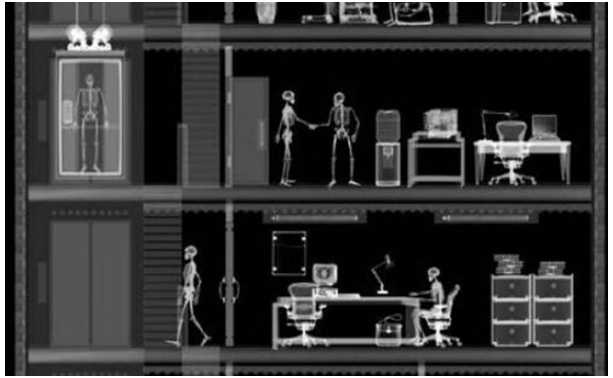
One of the main advantages of the conditions survey is that it gives congregations an opportunity to see all of the repairs they will eventually need to undertake, not only the most obvious problems. But planning to complete all of the architect's recommendations can be daunting. By designating phases,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

Survey recommendations are usually prioritized, which provides a basis for phasing. "We designate each recommended repair a first, second, or third priority," explained John Bero, president of Bero Associates Architects of Rochester, NY. "First priority items threaten life safety or require immediate stabilization. Second priority items are deferrable but necessary, and third priority recommendations are optional upgrades or elements for restoration. Congregations usually make a package with some items from each." The "package," or phase of work, is made up of a few different projects that will be completed at once or over a period of time.

The architect who completed the conditions survey will often assist the congregation in designating work phases. Walter Sedovic, of Walter Sedovic Architects in Irvington-on-Hudson, NY, includes several meetings in a typical conditions survey contract. "We like to have the religious leaders, the building committee, and the congregation present," he said. "We clarify what's urgent. Then the building committee usually comes back to us with specific high priority items that they'd like to do." Architects from Sedovic's firm then work to develop a schedule, setting out several phases with anticipated dates of completion.

Phases 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 mortar was deteriorated and it looked like a huge crack was running down the middle," recalled Kathleen Urbanic, chair of the Church Restoration Committee. The church's architect, Bero Associates, confirmed

Building Conditions Assessment



- **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%)

Capital Grant Disbursement

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

PLEASE NOTE!

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

2023

Application Process

Application Timeline 2023

January 11	February 24	June 16	July 14	Mid-October
LOI Opens	LOI Due	LOI Notifications	Full Applications Due	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

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Historic, Cultural, Architectural Significance

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?

Community-Serving Congregations

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

Project Scope and Need

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

Healthy Congregations

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.

SUBMIT LOI (OPEN UNTIL FEB 24 2023)

REGISTER FOR LOI WEBINAR (FEB 1 2023 AT 12PM EST)

REWATCH 2022 LOI WEBINAR RECORDING

fundforsacredplaces.org

Location of the LOI

Location of the LOI

National Fund for Sacred Places 2022 | Accepting Submissions from 01/18/2022 to 03/07/2022 | Apply

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:

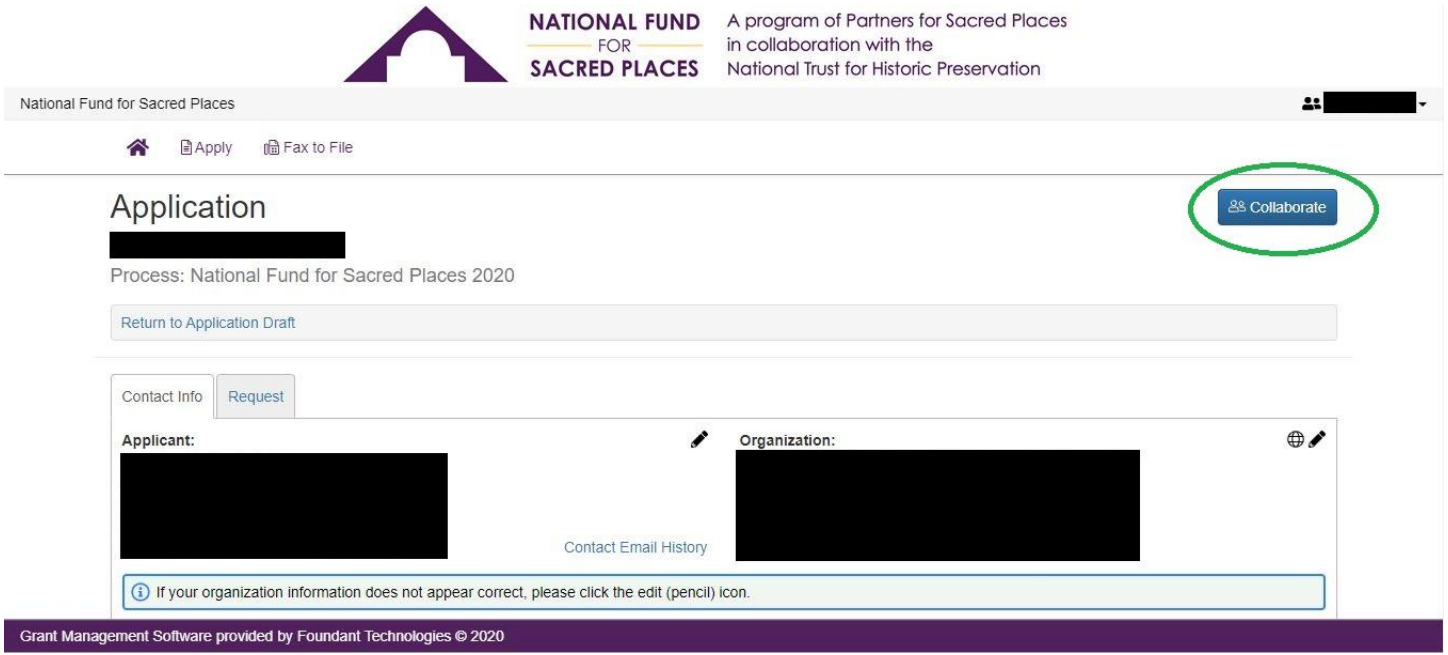
1) grants for the planning and execution of urgent capital projects at historic sacred places that are valued for their cultural importance as well as their role in providing human services, strengthening communities, and revitalizing neighborhoods; and
2) training, capacity-building, and technical assistance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

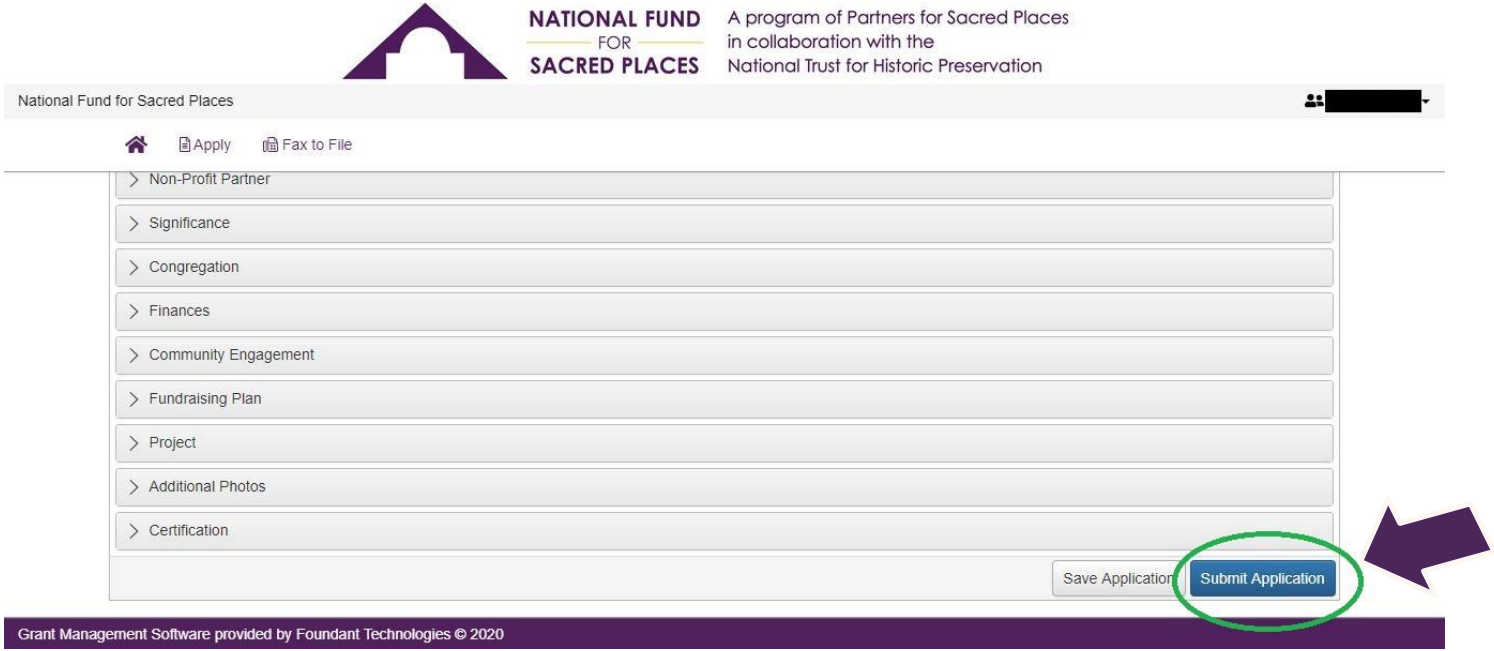
Letters of Intent for the 2022 cohort of participants are now being accepted, and are due March 7, 2022 at 11:59 p.m. local time. For more information visit fundforsacredplaces.org.

Preview | Send to GrantHub

Add Collaborators



How to Submit the LOI



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Q&A

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Contact Information

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

Deadline: February 24, 11:59 PM EST

Thank you!