



Welcome!



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



National Fund Overview



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Introduction



Funded through 2027 by



Lilly Endowment Inc.

A Private Philanthropic Foundation

113 congregations served

\$40+ million committed



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The National Fund Program



AT THE INTERSECTION
OF HERITAGE, FAITH,
& COMMUNITY

Partners for Sacred Places

in collaboration with



National Trust *for*
Historic Preservation

Save the past. Enrich the future.™

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

Lily Hamilton, Grants Manager

Emily Sajdak, Senior Project Manager

National Trust for Historic Preservation

Jennifer Sandy, Senior Director of Preservation
Programs

Ann Phillips, Preservation Architect

Dawn Ellis, Associate Manager

Diana Maxwell, Senior Manager of Grants



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Advisory Committee Members

Barbara Abrajano, Director of Development and Community Engagement, East-West University

Alice Antonelli, Director, Nonprofit Finance Fund

Rabbi Michael Balinsky, Former Executive Vice President, Chicago Board of Rabbis

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



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Advisory Committee Members

The Rev. Dr. Thomas E. Frank, President, Heritage Conservation Carolina & Retired University Professor, Wake Forest University

Christopher S. Hunter, PhD, 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

Ariana Makau, President & Principal Conservator, Nzilani Glass Conservation

Jorge Rigau, Architect, Arquitectos PSC

Edward Torrez, President and Principal, Bauer Latoza Studio

The Rev. Robb R. Webb III, Director of the Rural Church Program, The Duke Endowment

Robin Whitehurst, Principal, Bailey Edwards Architects and Board Chair, Partners for Sacred Places

The Rev. Brian Williams, Program Director, Religion Division, Lilly Endowment



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Program Components



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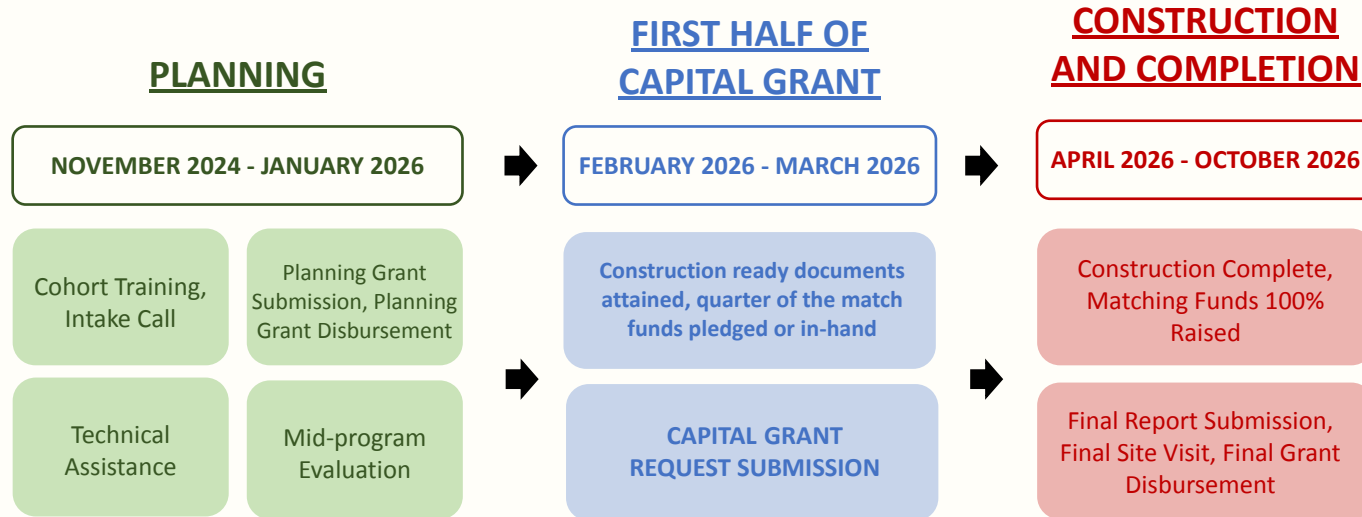
National Fund Program Components

National Fund grantees receive:

1. Training
2. Technical Assistance
3. Planning Grant - Up to \$10,000 (no match required)
4. Capital Grant - \$50,000-\$500,000 (match required)

Typical Program Timeline

Target of 2 years
(November 2024 – October 2026)



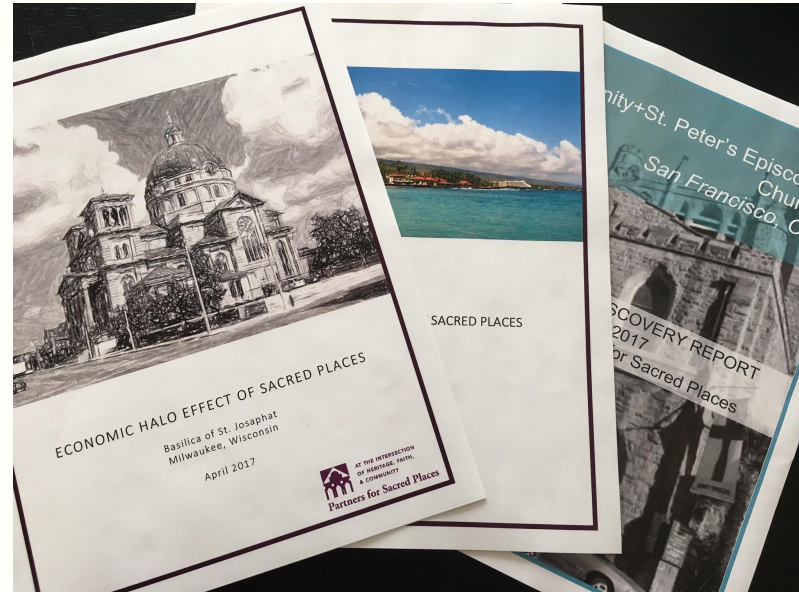
Training

- Capital project planning
- Making your case for support
- Community-wide fundraising
- Friends groups and supporting organizations
- National Fund overview



Technical Assistance

- Capital Campaign Support
- Communications Support
- *Economic Halo Effect Study*
- Community Engagement



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 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 recom-



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

mendations 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 Koska 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

Capital Grant

- We offer grants of \$50,000 - \$500,000.
- Capital grants require a match
 - 1:1** for \$50,000 - \$175,000 grants
 - 2:1** for \$175,001 - \$500,000 grants
- **The majority of our grants will be \$250,000 or less. We have very limited ability to make grants exceeding \$250,000**



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Eligible Matching Funds

- Congregational giving
- Fundraising events (ticketed events, raffles, concerts, etc.)
- Cash or documented pledges from individuals, foundations, or corporations
- Government grants
- Proceeds from the sale of stock or real estate
- Matured bequests
- Donated materials and/or professional services (up to 20%) that directly benefit the grant-funded project



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Ineligible Matching Funds

- Endowment or reserve funds (including interest)
- Bridge or construction loans
- Funds solicited, applied for, pledged, or secured prior to official acceptance into the program (Mid October 2024)
- Other grants from the National Trust for Historic Preservation



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Eligible Projects

The property must have **urgent repair needs** related to structural components, walls, roof, and/or other elements of the building envelope that are integral to building preservation and longevity. Projects that **improve functionality or improve accessibility** of the property in accordance with the Americans with Disabilities Act (ADA) are also eligible, as well as renovation projects that **make vacant or underused space usable for community outreach**, *but applicants should demonstrate that urgent repair needs to the building envelope have already been identified by a building condition assessment and addressed before proposing ADA or interior rehabilitation projects.*



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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

Visit fundforsacredplaces.org for complete list of ineligible projects.



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Capital Grant Disbursement Process

To receive the first 50% of the funds, the following benchmarks must be met:

- ¼ of the match raised (in hand or pledged)
- Construction-ready drawings and specs describing National Fund scope of work



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Reporting Requirements

- An interim report is submitted once construction is 50% complete
- A final report is submitted once construction is 100% complete
- Final site visit
- THEN second disbursement of grant funds



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Please Note!

Construction cannot begin on the National Fund Scope of Work until our team has approved your capital grant submission.



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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?



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Building Conditions Assessment



Seek out Experienced Professionals

- Always consider professionals experienced with historic properties
- look at websites, portfolios, check references of contractors and architects, talk to past clients, etc.

How to find Experienced Professionals?

- Reach out to your local preservation organizations, municipal preservation office, and/or your State Historic Preservation Office (SHPO) for suggestions of experienced professionals.

What is the deliverable/what should I expect?

- The format of the final product may vary
- Typically includes photographs of existing conditions, a thorough report describing existing conditions, prioritized list of recommended actions which should be used to inform your project's scope of work.



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Building Conditions Assessment

Steeple - Masonry



The steeple is constructed primarily of brick masonry with stone banding. The general condition of the steeple masonry is consistent with the condition of masonry on the primary church building, with some areas/elements in need of repair or reconstruction.

Repointing - General observation is consistent with review of the prior masonry repair bid. 80%-100% of the joints likely require repointing.



Masonry Cleaning - Masonry should be cleaned using the most gentle means possible. Given the observed deterioration of some of the masonry accents and banding, cleaning (if attempted) should be performed by hand with soap/water and soft-bristle brushes. In no case should pressure washing or mechanical "blasting" be used.



Replacement - Spalling masonry represents a potential danger to the building and pedestrians. A variety of different conditions were observed from initial cracks to major deterioration/failure of masonry units.

Masonry - Foundation



The primary foundation walls on the original structure are a split-face stone laid in an "ashlar" pattern. In general, the masonry foundation walls are in fair to good condition. Isolated areas, however, are showing signs of settling and cracking. Particularity of note are individual spalling stones, visible cracks, and areas of deteriorated or inappropriate mortar.



This photo is an example of a location where the repair mortar appears to be of a different composition than the original. The stone lintel and window opening are subject to differential settling and likely will need to be reset back to solid supporting material at some point in the future. Conditions like this should be monitored closely over time.



It is recommended that a detailed masonry plan and maintenance strategy be prepared. Masonry work can be "triaged" such that emergent issues are taken care of and a plan for regular maintenance put in place to address other non-emergent issues.



Refer to the Steeple Masonry section for additional information. The steeple repairs should be prioritized, along with foundation settling and reconstruction in order to ensure long-term stability. Additional "non-emergent" repointing, repairs, and maintenance can be monitored and addressed over time.

Wood Windows - Rehabilitation and Restoration



Windows and window trim/moldings are typically considered a "character-defining feature" of historic buildings. Where original wood windows remain, they can often be restored to full working order.

Typical window restoration scope would include removal of the sashes, wood sash repair, repair of hardware/pulleys, reglazing, repainting, weatherstripping, jamb and sill repair, interior and exterior trim repair, and rehanging.

Wood trim/moldings at existing window and door openings are in varying stages of deterioration. Coordinated with other work, repair and/or replacement of these trim pieces should be addressed.

In many cases, deteriorated wood can be consolidated and repaired with wood-epoxy (such as "Abatron"). Where window elements are too far deteriorated, or require removal in order to address underlying repairs, this trim can be replicated and replaced with new wood elements to match the existing.

Masonry - Cleaning



Lichen and moss growth were observed in some areas. This condition should be addressed as part of the overall masonry maintenance strategy.

All masonry cleaning should be performed in accordance with Historic Preservation Brief #1 using the gentlest method that achieves the desired result. So-called "blasting" methods should never be used.

Masonry - Steel Lintels



Some of the masonry opening headers (in particular on the school wing addition) are supported by steel bearing lintels - angles and plates that support the masonry structure above. These elements are subject to deterioration and rusting due to exposure to moisture.

When masonry work (repointing) is performed, steel lintels should be evaluated for bearing and deterioration. Failing elements should be replaced.

Paint coatings should be well-maintained to increase the longevity of exposed steel lintels.

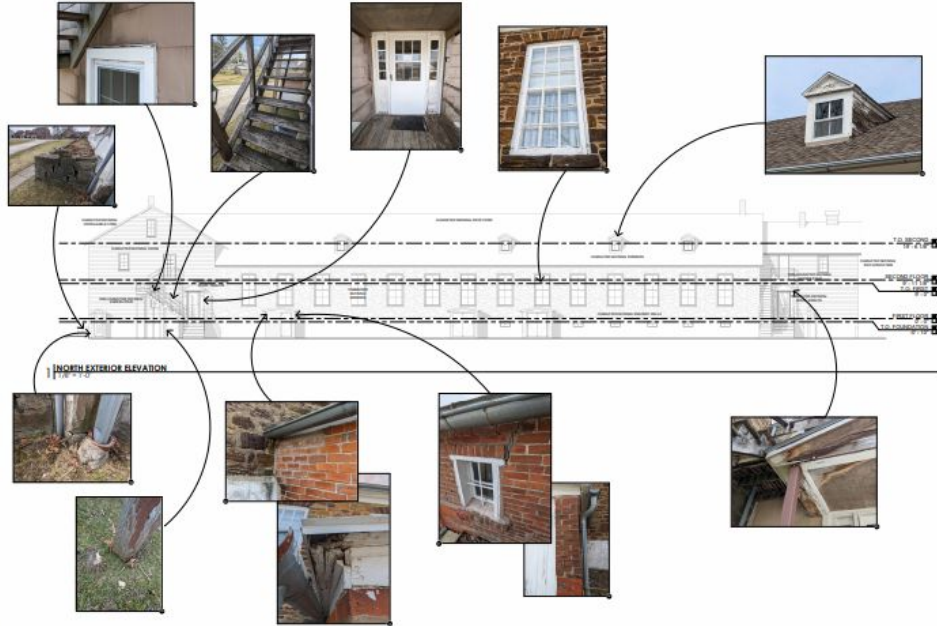
Masonry - Inappropriate Mortar



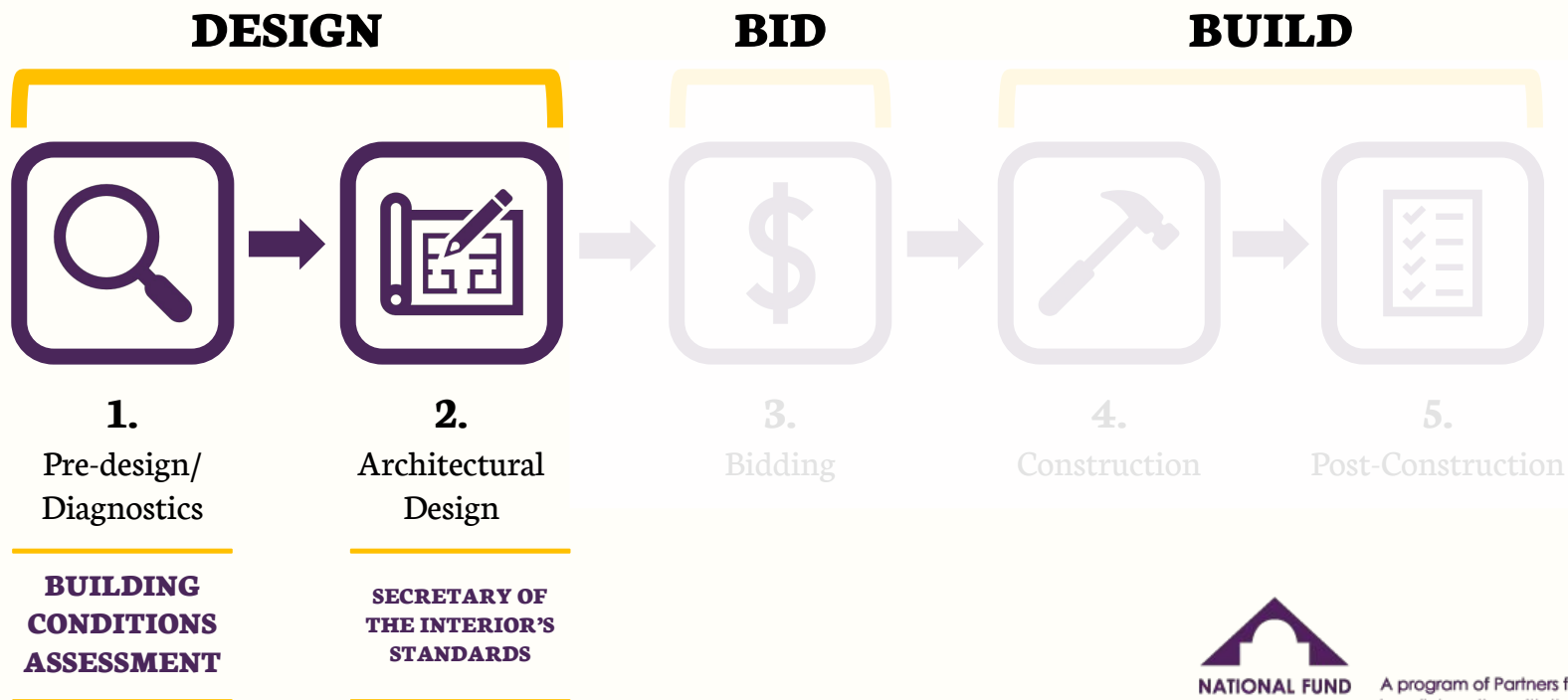
In general, the masonry walls are in fair to good condition, with isolated areas of inappropriate treatment (repointing) and deteriorated mortar joints.

The photos to the left illustrate a variety of conditions that should be addressed over time.

It is recommended that a detailed masonry plan and maintenance strategy be prepared. Masonry work can be "triaged" such that emergent issues



How is a Capital Project Completed?



Secretary of the Interior's Standards

PRESERVATION

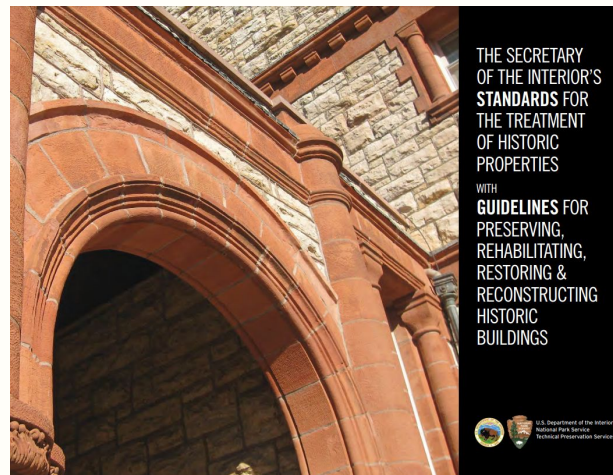
REHABILITATION

RESTORATION

RECONSTRUCTION

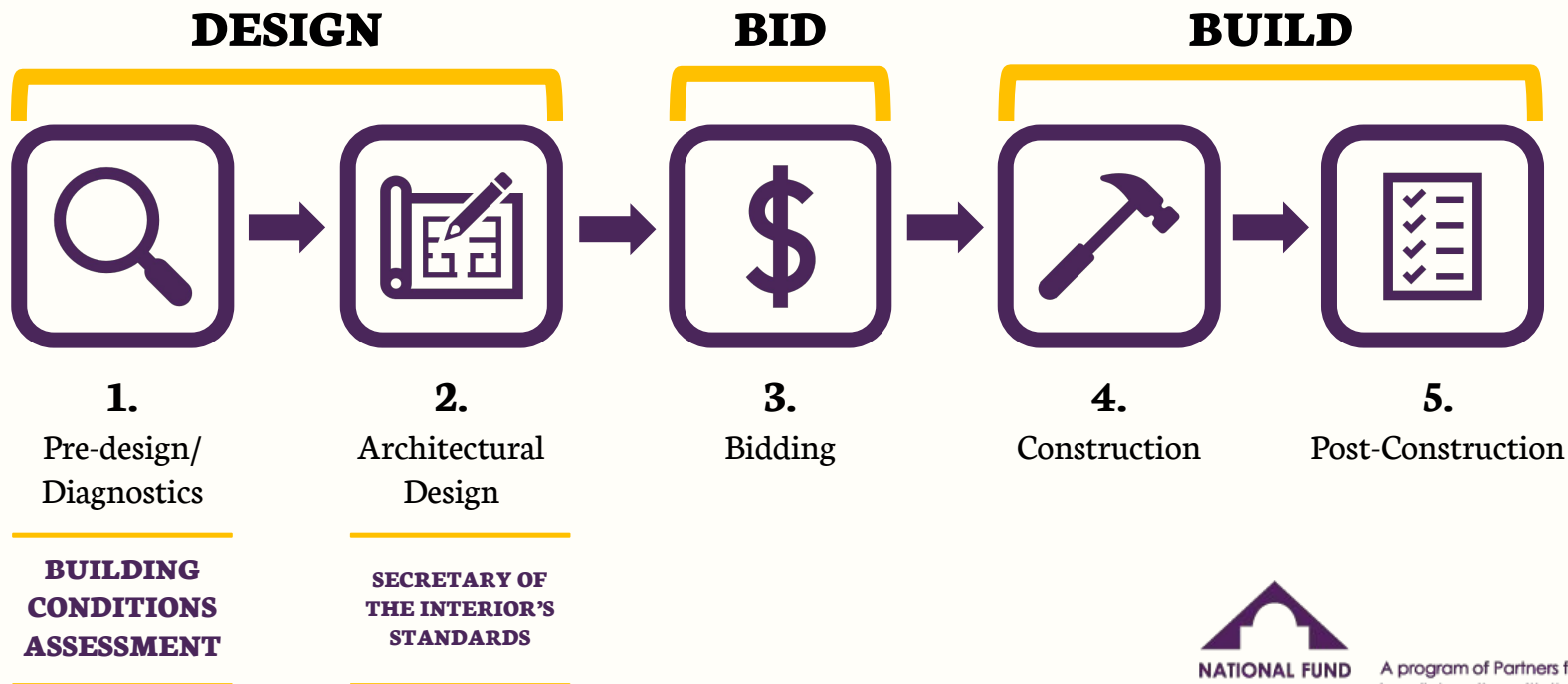
Standards for Rehabilitation

1. A property will be used as it was historically or be given a new use that requires minimal change to its distinctive materials, features, spaces and spatial relationships.
2. The historic character of a property will be retained and preserved. The removal of distinctive materials or alteration of features, spaces and spatial relationships that characterize a property will be avoided.
3. Each property will be recognized as a physical record of its time, place and use. Changes that create a false sense of historical development, such as adding conjectural features or elements from other historic properties, will not be undertaken.
4. Changes to a property that have acquired historic significance in their own right will be retained and preserved.
5. Distinctive materials, features, finishes, and construction techniques or examples of craftsmanship that characterize a property will be preserved.
6. Deteriorated historic features will be repaired rather than replaced. Where the severity of deterioration requires replacement of a distinctive feature, the new feature will match the old in design, color, texture and, where possible, materials. Replacement of missing features will be substantiated by documentary and physical evidence.
7. Chemical or physical treatments, if appropriate, will be undertaken using the gentlest means possible. Treatments that cause damage to historic materials will not be used.
8. Archeological resources will be protected and preserved in place. If such resources must be disturbed, mitigation measures will be undertaken.
9. New additions, exterior alterations, or related new construction will not destroy historic materials, features, and spatial relationships that characterize the property. The new work will be differentiated from the old and will be compatible with the historic materials, features, size, scale and proportion, and massing to protect the integrity of the property and its environment.
10. New additions and adjacent or related new construction will be undertaken in such a manner that, if removed in the future, the essential form and integrity of the historic property and its environment would be unimpaired.

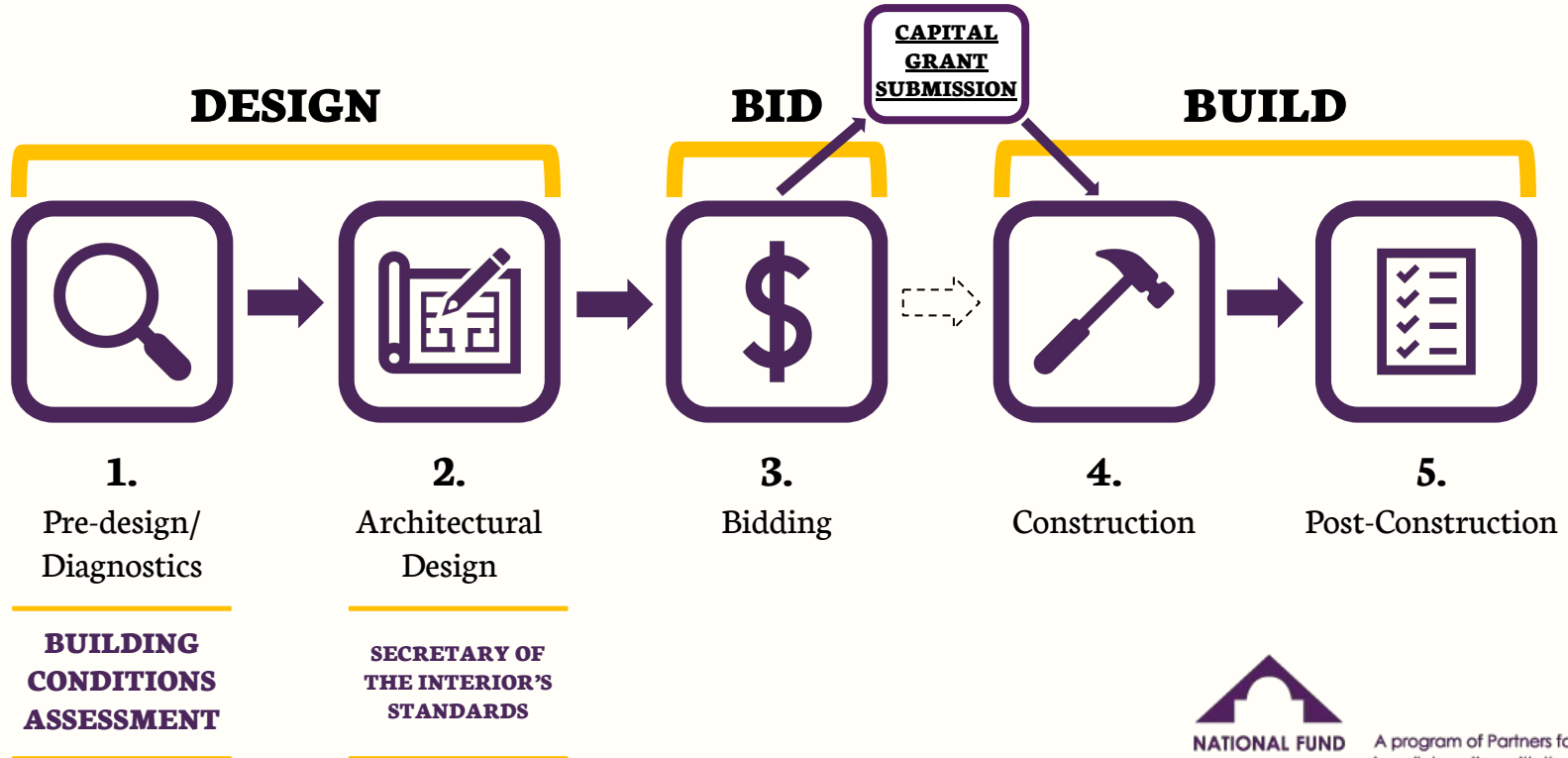


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How is a Capital Project Completed?



How is a Capital Project Completed?





Application Process



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Application Timeline 2024

LOI Stage

January 9
LOI Opens

February 29
LOI Due

June 14
LOI Notifications

Full Application Stage

June 14
Full Application
Opens

July 12
Full Application Due

Mid-October
Final Notifications



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Basic Eligibility

- Property must have been originally built as a house of worship
- Property must be owned and occupied by an active congregation (or held in trust by its denominational body)
- Applicant must be the congregation or closely affiliated nonprofit
- If applicant is a congregation, it must be at least 3 years old
- Congregation must demonstrate a need for project funds that exceed the congregation's typical donor base and membership



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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 location?



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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



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Project Scope and Need

We fund projects that:

- Address urgent repair needs
- Improve functionality or improve accessibility
- Make vacant or underused space usable for community outreach

Applicants should demonstrate that urgent repair needs to the building envelope have already been identified by a building condition assessment and addressed before proposing ADA or interior rehabilitation projects.

All projects must adhere to the *Secretary of the Interior's Standards for Rehabilitation.*



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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



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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



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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)



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Accessing the LOI

Application Deadlines & Process

Applications for the National Fund for Sacred Places are accepted annually. Typically, 15-20 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 9, 2024

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

Full Application Notifications

June 2024

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.

Final Notifications

October 2024

Final decisions will be made with the [Advisory Committee](#), and congregations will be notified in October.

LOI FORM WILL BE AVAILABLE
JANUARY 9, 2024

REGISTER FOR 2024 LOI
WEBINAR

VIEW 2023 LOI WEBINAR SLIDE
DECK

fundforsacredplaces.org

Accessing the LOI



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Logon Page

Email Address*

Password*

Log On

Create New Account

Welcome to the National Fund for Sacred Places on-line portal.

New Users: Please click on "Create New Account" to complete the registration process and create your logon credentials.

Existing Users: Please enter your credentials and log in. If you forgot your password, please use the "Forgot your Password" link to the left to reset your password.

Not Sure? If you think that you or someone at your organization has already registered in the system, do not create a new account. Please

Accessing the LOI



National Fund for Sacred Places 2024

Accepting Submissions from 01/09/2024 to 02/29/2024

APPLY

The National Fund for Sacred Places (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 2024 cohort of participants are now being accepted, and are due February 29th at 11:59 PM EST. For more information visit fundforsacredplaces.org.

PREVIEW

SEND TO GRANTHUB



Add Collaborators



NATIONAL FUND
FOR
SACRED PLACES

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National Fund for Sacred Places



APPLY

LOI

COLLABORATE 0

Process: National Fund for Sacred Places 2024

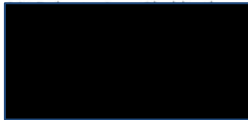
[Return to Application Submitted](#)

Contact Info

Request

Documents 0

Applicant:



Organization:



[Contact Email History](#)


LOI

QUESTION LIST



Due by 02/29/2024 11:59 PM EST.

How to Submit the LOI



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National Fund for Sacred Places

[HOME](#) [APPLY](#)

Fields with an asterisk (*) are required.

- > Introduction
- > Applicant
- > Eligibility
- > Case for Support
- > Outreach and Participation
- > Photos
- > Certification

Due by 02/29/2024 11:59 PM EST.

[ABANDON REQUEST](#) [SAVE LOI](#) [SUBMIT LOI](#)

Grant Management Software provided by Foundant Technologies © 2024



Q&A



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Contact Information

Partners for Sacred Places

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(215) 567-3234, x14

National Trust for Historic Preservation

fundforsacredplaces@savingplaces.org

LOI due February 29th, 11:59 PM EST



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