Welcome!
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National Fund Overview
Introduction

Funded through 2027 by

Lilly Endowment Inc.
A Private Philanthropic Foundation

113 congregations served

$40+ million committed
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
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
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
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)
Target of 2 years
(November 2024 – October 2026)

**Typical Program Timeline**

**PLANNING**

- **NOVEMBER 2024 - JANUARY 2026**
  - Cohort Training, Intake Call
  - Technical Assistance

- **FEBRUARY 2026 - MARCH 2026**
  - Planning Grant Submission, Planning Grant Disbursement
  - Construction ready documents attained, quarter of the match funds pledged or in-hand

**FIRST HALF OF CAPITAL GRANT**

**Capital Grant Request Submission**

**CONSTRUCTION AND COMPLETION**

- **APRIL 2026 - OCTOBER 2026**
  - Construction Complete, Matching Funds 100% Raised
  - Final Report Submission, Final Site Visit, Final Grant Disbursement
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
Up to $10,000 for

• Conditions assessments or architectural design services

• Capital campaign consulting services

• Creation of marketing materials, including video

Planning Grant

From Survey to Scope

by Shari Goldberg

The benefits of a conditions survey have been noted extensively in these pages. As an objective assessment of the building, it helps determine current conditions, predicts potential future problems, and, as cost estimates are usually included, it can be used to set fundraising goals. It is 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 the architect—before repairs can be undertaken. The survey document outlines suggestions, goals, and methods for building repair and renovation. It does not include the capital campaign needed to cover the cost of repairs, and drawings are 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 a fundraising plan.

After the survey has been completed, some churches or building committees or engineers, depending on who has been hired to perform the survey, will initiate the congregation about accumulating 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 pre-conversion procedures require significant commitment of money and require careful planning for the congregation prior to performing a new 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 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 fundraising plan that incorporates each project.

Survey recommendations are usually prioritized, which provides a basis for planning. “We design with recommended repair a first, second, or third priority,” explained John Heron, president of Heron Associates, Architects of Brooklyn, NY. “First priority items demand life safety or require immediate stabilization. Second priority items are deliverable but necessary, and third priority recommendations are optional, appendages or add-ons to these.” As such, congregations need to prioritize their work, 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 designing work phases. Walter Sullivan, AIA, of Sullivan Architects, Architects of Brooklyn, NY, includes several meetings to study the conditions survey and includes meetings about selecting 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 pre-conversion procedures require significant commitment of money and require careful planning for the congregation prior to performing a new conditions survey.

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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.
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
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
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.
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.
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
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
Please Note!

Construction cannot begin on the National Fund Scope of Work until our team has approved your capital grant submission.
Do you have a 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?
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.
Building Conditions Assessment

Masonry - Foundations

The primary foundation works on the original structure are in a solid core stone-laid in a "ashlar" pattern. In general, the masonry foundation walls are in good condition and well-made, but there are a few concerns. The foundation is undamaged, however, showing signs of settling and cracking. Particularly noted are indications of cracking and/or deformation of masonry units. This photo is an example of a location where the repair needed is for a solid foundation construction. The stone lintel and window openings are subject to differential settling and would need to be restored to design specifications. In some instances, it may be necessary to address underlying repair issues. This topic can be restored and evaluated with new masonry elements to match the existing.

It is recommended to develop a detailed masonry plan and maintenance strategy to be prepared. Masonry should be monitored on an ongoing basis. Masonry issues are taken care of and a plan for regular maintenance can be in place to address any masonry issues.

Masonry - Masonry

The masonry is constructed mainly of brick and stone in a "crack" pattern. The general condition is consistent with the masonry on the primary church building. However, some areas require repair and/or consolidation. The masonry is generally in good condition, but there are some areas requiring attention.

The masonry condition is consistent with the type masonry repair detailed below. In 10% of the area, less repair is recommended.

Masonry - Cladding

The masonry cladding is in good condition, showing signs of settling and cracking. The cladding is generally in good condition; however, there are some concerns. The cladding is generally in good condition, but there are some areas requiring attention.

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Masonry - Inappropriate Mortar

In general, the masonry wall is in fair to good condition, with some areas requiring attention. Inappropriate restoration (replacing) and determined mortar joints.

The photos in 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 "touched" such as the masonry work needed in the repair areas. The masonry work can be "touched" such as the masonry work needed in the repair areas. The masonry work can be "touched" such as the masonry work needed in the repair areas.

Masonry - Inappropriate Restoration

Windows and window trim/mouldings are typically considered a "distress-related factor" in the overall condition of the building. They are often the reason for full masonry repair.

Typical window restoration scope would include removal of the sashes, wood replacement, repair of hardware, and reglazing grouting.

Wood trim/mouldings are an existing window and door openings in areas experiencing damage. Conditioned with other work, repair or replacement of these pieces should be considered.

In many cases, damaged wood can be consolidated and repaired with wood-graining (such as "R sistent") and window elements are too for decorative purposes. The overall condition of these pieces should be considered in the overall restoration. This topic can be consolidated and rehabilitated with new wood elements to match the existing.

Masonry - Steel Locates

Some of the masonry opening headers (in particular the metal ribbed steel) are subject to steel bearing failure areas and where the impact from the load on the window or door opening may not be evenly distributed. These can be restored to address underlying issues. This topic can be restored to address these areas.

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

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

Masonry - Reinstallation and Restoration

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How is a Capital Project Completed?

**DESIGN**

1. Pre-design/Diagnostics
2. Architectural Design

**BID**

3. Bidding
4. Construction
5. Post-Construction

**BUILDING CONDITIONS ASSESSMENT**

**SECRETARY OF THE INTERIOR’S STANDARDS**
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.
How is a Capital Project Completed?

DESIGN
1. Pre-design/Diagnostics
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BUILDING CONDITIONS ASSESSMENT
SECRETARY OF THE INTERIOR’S STANDARDS
How is a Capital Project Completed?

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DESIGN

BUILD

BUILDING CONDITIONS ASSESSMENT
SECRETARY OF THE INTERIOR'S STANDARDS
Application Process
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
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
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 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 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.*
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
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)
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
Accessing the LOI

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.
Add Collaborators
How to Submit the LOI
Q&A
Partners for Sacred Places
Lily Hamilton, Grants Manager
lhamilton@sacredplaces.org
(215) 567-3234, x14

National Trust for Historic Preservation
fundforsacredplaces@savingplaces.org

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