Preservation Services Fund

National Trust *for* Historic Preservation

Grants **from the Preservation Services Fund (PSF) of the National Trust for Historic Preservation are designed to encourage preservation at the local level by providing seed money for preservation projects. These grants help stimulate public discussion, enable local groups to gain the technical expertise needed for particular projects, introduce the public to preservation concepts and techniques, and encourage financial participation by the private sector. A small grant at the right time can go a long way and is often the catalyst that inspires a community to take action on a preservation project.**

The National Trust for Historic Preservation provides leadership, education and advocacy to save America's diverse historic places and revitalize our communities.

Support for the National Trust is provided by membership dues; endowment funds; individual, corporate and foundation contributions; and grants from state and federal agencies.

NATIONAL TRUST
for HISTORIC PRESERVATION™

1785 Massachusetts Avenue, N.W.
Washington, DC 20036
202.588.6197

Awards

PSF grant award applicants must be:

- Nonprofit incorporated organizations or public agencies
- Capable of matching the grant amount dollar-for-dollar

The grant range is $500 to $5,000. Most grants average $1,000 to $2,000.

Applications
Applications must be mailed to the appropriate National Trust regional office. Handwritten applications and applications submitted via fax will not be accepted. Applicants must contact their regional office to discuss the project before applying.

Deadlines
Applicants should contact the National Trust regional office serving their state to obtain information regarding application deadlines.

Selection
The selection process is very competitive. Applicants are encouraged to develop proposals carefully and to complete the application form with the assistance and guidance of the National Trust regional office. The review process is completed within six weeks and applicants are notified in writing.

Successful applicants are required to sign a contract letter agreeing to the conditions of the program.

Final Report
Within one year from the grant disbursement date, a final report and financial accounting of the expenditure of the grant must be submitted. If the project was not completed in accordance with the contract, the grant funds must be returned.

Eligible Activities

Preservation Services Fund grants are awarded for preservation planning and education efforts.

Planning: Support for obtaining professional expertise in areas such as architecture, archeology, engineering, preservation planning, land-use planning, fund raising, organizational development and law. Examples of eligible planning activities include:

- Hiring a preservation architect or landscape architect to produce a historic structures report or landscape master plan
- Hiring a preservation planner to produce design guidelines for a historic district
- Hiring an organizational development consultant to facilitate a strategic planning retreat for a preservation non-profit board
- Hiring a real estate development consultant to develop an economic feasibility study for the reuse of a threatened structure
- Hiring a fund raising consultant to develop a capital campaign for a building rehabilitation
- Sponsoring a community forum to develop a shared vision for the future of a historic neighborhood

Education and Outreach: Support for preservation education activities to educate the public. Examples of eligible activities include:

- Sponsoring a workshop on the preservation of burial grounds or cultural landscapes
- Underwriting travel costs or honoraria for a keynote speaker at a statewide preservation conference
- Preparing a manual on the use of transportation enhancement funds for preservation projects
- Developing a curriculum on ethnic heritage for school children
- Hiring a media relations consultant to develop a media campaign for an endangered properties list

Ineligible Activities

- Building or other construction activities
- Historic resource surveys to create inventories or to list resources in the National Register
- Academic research
- Acquisition of real property or objects

Eligible Expenses

- Fees for consultant services
- Speaker/faculty costs (honoraria, travel and lodging), room rental for conferences
- Materials and services such as printing, photographs, telephone and supplies—with the exception of publications projects, these costs may not exceed 10 percent of the project budget
- Mailing costs for distribution of project materials

Ineligible Expenses

- Staff or faculty salaries
- Organizational overhead costs
- Construction or other capital improvement costs
- Expenses incurred prior to award date

Eligible Sources of Matching Funds

- Cash contributions from private or public sources
- Earned income from registration fees or fund raising activities

Ineligible Sources of Matching Funds

- Staff salaries
- Organizational overhead costs

Criteria

No more than three grants will be awarded in any two-year period to a single grantee. Only one grant will be awarded per organization in any grant round. Only one grant will be awarded for a particular project phase.

The regional office review committee will select grant recipients by considering, among other points, the following issues:

- How critical and urgent is the need for this project/activity?
- Is the project unique and the resource significant?
- Has a timetable been established for the planned activity?
- What are the qualifications of the key personnel, including consultants, who will carry out or supervise the project?
- Is the budget reasonable? Has the applicant provided an adequate match and evidence of community support?
- How well has the applicant performed on any previous preservation projects or activities, including those assisted by a National Trust grant or loan?
- What will be the long-term result of the project?
- Will the results of the proposed activity be transferable to other preservation projects or will they have a catalytic effect on other local preservation activities?

Conditions

The following conditions must be met for each grant award.

- Grantees must be National Trust Forum members to receive an award.
- Consultants must be approved by the National Trust before grant funds are disbursed.
- At least three competitive bids/quotes must be obtained for any procurement of services that exceeds $10,000.
- Applicants must agree not to discriminate against any employee or applicant for employment because of race, color, religion, sex, age, national origin or sexual orientation. This obligation also extends to disabled veterans, Vietnam-era veterans and handicapped persons.
- Grant recipients must include appropriate acknowledgment of National Trust financial support in all printed materials generated for the project.
- Any documents or plans for preservation work that result from the project must conform to the Secretary of the Interior's Standards for the Treatment of Historic Properties.
- PSF grants or matching funds cannot be used directly or indirectly to influence a member of Congress to favor or oppose any legislation or appropriation.
- All work supported by previous PSF awards must have been satisfactorily completed and a final report report and financial accounting of the grant approved.

NATIONAL TRUST
for HISTORIC PRESERVATION

PRESERVATION SERVICES FUND
Grant Application

Grants from the Preservation Services Fund (PSF) are available to nonprofit organizations and government agencies. Applications should be prepared after reading the program brochure and consulting with the National Trust regional office.

Membership in National Trust Forum is required in order to receive a grant from the Preservation Services Fund.

Enter information or "not applicable" in the space provided for a response. Additional information may be attached. **Incomplete, faxed or handwritten applications will not be considered.** Refer to GUIDELINES AND CHECKLIST on back page.

APPLICANT

1. Name of Applicant (as it appears in articles of incorporation): _____
   Address: _____
   City: _____ State: _____ Zip: _____ Telephone: _____
   Fax: _____ E-Mail Address: _____

2. Contact (individual responsible for project):
   Name: _____ Title: _____
   Address: _____
   City: _____ State: _____ Zip: _____ Daytime Telephone: _____
   Fax: _____ E-Mail Address: _____

3. Applicant's National Trust Forum membership number: _____

4. The applicant is: ☐ a nonprofit organization ☐ a public agency

5. Has the applicant received an Internal Revenue Service determination that it qualifies as a tax-exempt organization pursuant to Section 501(c)(3) of the Internal Revenue Code?
   ☐ Yes ☐ No If no, state the organization's current tax status: _____

6. State the mission and goals of organization:

PROJECT DESCRIPTION

Project refers to the specific activity for which PSF funding is being requested, e.g., feasibility study, workshop, fund-raising plan.

7. Name of project: _____

8. Location of project: City: _____
County: _____
State: _____

9. Project Summary (50 words or less):

10. Date(s) project will occur: _____

11. Describe the targeted audience and estimated attendance, if applicable.

12. Detailed Project Description: Describe the project's purpose, schedule and anticipated outcome.

Describe any product(s) that will result from this project.

Any documents or plans for restoration work that result from this project must conform to the Secretary of the Interior's *Standards for the Treatment of Historic Properties.*

13. Have the following preservation partners been involved in this project? If so, how?

☐ State historic preservation office (SHPO), local preservation commission, or CLG – contact person(s)?

☐ Statewide or local preservation organization – contact person(s)?

☐ Other cosponsoring/cooperating organizations?

14. If the project involves a historic resource (site, building, ship, etc.), please complete the following:

Name of site/district: _____

Address(es): _____

Date(s) of construction: _____

Is the project site recognized for its architectural/cultural/historical significance by any of the following designation programs?

	Yes	No	Eligible	Date Listed
National Historic Landmark	☐	☐	☐	
Individually Listed on National Register of Historic Places	☐	☐	☐	
Contributing Property to National Register Historic District	☐	☐	☐	
State Designation Program	☐	☐	☐	
Local Designation Program	☐	☐	☐	
Other (specify)	☐	☐	☐	

Describe the project site and explain its significance (architectural/cultural/historical):

What is the site's current use:

15. If applicant does not own the property, describe owner's involvement with the project: (Include a letter of consent from owner.)

16. Describe future plans for the project beyond the scope of this grant proposal (e.g., how consultant recommendations will be implemented, how educational programs will be institutionalized, how publications will be distributed, etc.)

17. Describe the consultant services and skills needed to carry out the project.

18. Grant funds will not be disbursed until the National Trust has approved the qualifications of the personnel selected to conduct the project. PSF funding cannot be used to pay staff salaries. Board members of the applicant organization cannot serve as consultants unless appropriate conflict of interest procedures are followed and documented. If consultant services exceed $10,000, a competitive bid process is required if National Trust funding is received.

    Have consultant(s) been chosen?

    - ☐ Yes – Specify below and attach resume. Be sure to include the consultant's name, address, telephone number and e-mail address.
    - ☐ No – Discuss with National Trust regional office.

19. Has applicant received National Trust financial assistance in the last two years? ☐ Yes ☐ No
    If yes, provide the name of the project and the year. Note that applicants are not eligible to receive funding if final reports on previous grants have not been submitted.

20. How will National Trust for Historic Preservation support for the project be acknowledged?

PROJECT BUDGET

The project budget pertains to the proposed PSF activity only. Please be sure the budget balances — the total income amount must equal the total expense amount.

PSF grant funds must be matched on at least a 1:1 cash basis. Attach evidence of anticipated or confirmed sources of funding and other support. Staff time and overhead costs cannot be used as match. PSF funds that have not been matched or used, or those used for purposes other than the approved project, must be returned to the National Trust.

With the exception of publication projects, materials and services (such as printing, photographs, telephone, and supplies) costs may not exceed 10 percent of the project budget.

INCOME	AMOUNT
PSF grant (amount requested from National Trust)	
Matching funds (identify sources and note whether anticipated or confirmed)	
Total Project Income:	$0.00

EXPENSES	AMOUNT
Sample categories have been provided. Please use "other" spaces to add relevant categories.	
Consultant fee/honorarium	
Travel/per diem	
Printing costs	
Photography costs	
Mailing and postage	
Supplies	
Other – specify:	
Total Project Expenses:	$0.00

CONDITIONS

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- Grantees must be National Trust Forum members to receive an award.
- Consultants must be approved by the National Trust before grant funds are disbursed.
- At least three competitive bids/quotes must be obtained for any procurement of services that exceeds $10,000.
- Applicants must agree not to discriminate against any employee or applicant for employment because of race, color, religion, sex, age, national origin or sexual orientation. This obligation also extends to disabled veterans, Vietnam-era veterans and handicapped persons.
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- PSF grants or matching funds cannot be used directly or indirectly to influence a member of Congress to favor or oppose any legislation or appropriation.
- All work supported by previous PSF awards must have been satisfactorily completed and a final report and financial accounting of the grant approved.

GUIDELINES and CHECKLIST

- Please read the application form carefully and refer to the program brochure or the National Trust regional office for clarification.
- Requested information or "not applicable" should be entered in the space provided.
- Incomplete, faxed or handwritten applications will not be considered.
- Materials submitted will not be returned.
- Please do not use plastic covers or binders; assemble applications and attachments in a manila folder or clip.
- Submission of videos and oversized documents is discouraged.

The following materials are required for grant consideration:

☐ **two (2)** signed copies of the completed application
☐ **four (4)** different 35mm slides of the project site, labeled and dated
☐ **two (2)** different 4" x 6" or larger photographs of the project site, labeled and dated

Attach **one** copy of the following materials:

☐ applicant's articles of incorporation (nonprofit organizations)
☐ applicant's current board of directors (nonprofit organizations)
☐ applicant's Internal Revenue Service determination letter of tax-exempt status. If tax-exempt status has not been fully approved by the IRS, please provide evidence of filing for certification and letter of opinion from an attorney concerning the applicant's tax status (nonprofit organizations)
☐ documentation identifying the organization as part of a state, regional, county, or local government (public agencies)
☐ resume(s) of consultant(s) being considered for the project
☐ resume(s) of personnel administering program
☐ letters of endorsement

Mail completed application and attachments to the appropriate National Trust regional office for your state. A list of National Trust regional offices is included in the Preservation Services Fund brochure or call (202) 588-6197 for the correct address. The review process is completed within six weeks of the deadline and applicants are notified in writing.

CERTIFICATION

Acting as a duly authorized representative of the described project and its sponsoring organization, I am submitting this request for a Preservation Services Fund grant.

Name: _____ Title: _____

Signature: _____ Date: _____