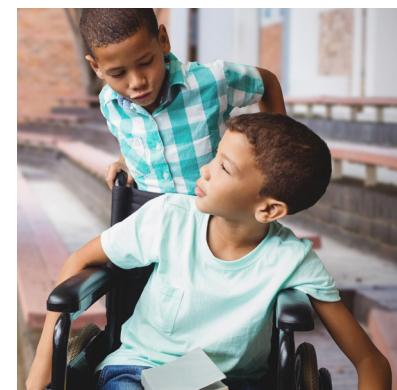
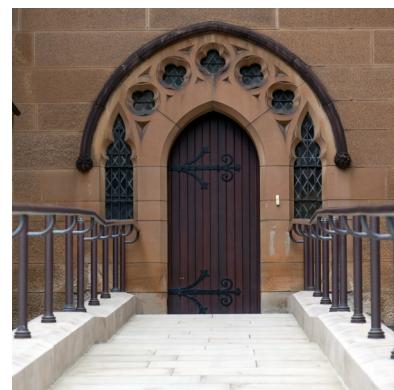


|| THE RETIREMENT RESEARCH FOUNDATION ||

OPENING DOORS. CREATING COMMUNITY.



THE ACCESSIBLE FAITH GRANT PROGRAM

SMALL GRANTS MAKING A BIG IMPACT

An Invitation to Engage Faith Communities

We are pleased to share this report on the Accessible Faith Grant Program with you. From 2003 to 2015, The Retirement Research Foundation (RRF) operated this program as a special initiative. The Accessible Faith Grant Program helped houses of worship make physical improvements so their facilities would be accessible to all, particularly older adults and people with disabilities — vital members of their congregations and communities who were often unintentionally excluded.

These days, houses of worship have expanded well beyond shepherding the spiritual life of their congregants — they are stepping up to meet the pressing needs of entire communities with services and programs that help their neighbors thrive and gain a better quality of life. The social impact of houses of worship cannot be underestimated. They serve as temporary and homeless shelters, food pantries and congregate meal sites, immunization and polling places, venues for community groups, social services, and after school programs, and safe places for celebration and healing.

Yet, houses of worship have been beyond the reach of many older adults and people with physical disabilities for the simple reason that vintage buildings often lack basic accessibility features such as ramps, railings, and elevators. For more than a decade, RRF partnered with



houses of worship to remove physical barriers to accessibility that thwarted their social justice efforts. RRF grants helped them make essential improvements such as accessible restrooms, elevators, and assistive devices.

The Accessible Faith Grant Program taught us that when a sacred space is made more accessible for older adults, the entire community benefits in countless ways. We hope that this report will inspire forward-thinking funders like you to offer a comparable program in your community. We welcome your inquiries and would be pleased to share our lessons and tools with you.

Sincerely,

A handwritten signature in black ink that reads "Nathaniel P. McParland, MD".

Nathaniel P. McParland, MD
Chair

A handwritten signature in black ink that reads "Irene Frye".

Irene Frye
Executive Director

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1

Accessibility for Houses of Worship: A Lasting Value

“A single grant award with visible, measurable results that last for decades.”

Origin of the Accessible Faith Grant Program

In 2000, RRF funded research on the accessibility of Chicago-area houses of worship. The study was conducted by an independent non-profit organization and represented diverse ethnic, economic, and religious organizations in older urban, suburban, and rural communities. It revealed that most of the 100 surveyed facilities had significant architectural barriers to participation. Half of the congregations desired better accessibility, but project costs and the tight budgets under which they operated meant that outside funding would be needed to make the improvements.

However, houses of worship found that few funding opportunities were available. Some denominations offered small grants for accessibility



projects, leaving congregations responsible for the bulk of the project costs. Local lenders occasionally made second mortgages, but lending requirements for congregations were very strict.

State and local government funds that might support other not-for-profits were unavailable to religious organizations due to the separation requirements between church and state.

Though many foundations exclude capital projects from their priorities and rarely fund religious entities, RRF decided to reverse this practice so it could serve its core constituency — older adults. The Accessible Faith Grant (AFG) program was created to help religious congregations make their facilities more accessible and thus more usable by their members and the larger community. The AFG program was unique in that a single grant brought additional dollars to the project, had a visible outcome, and a measurable result. Essentially, it provided a one-time improvement that would last many decades and benefit many generations.

The Foundation recognized that houses of worship are valuable community resources and wanted these facilities and their activities to be broadly available. Through AFG's competitive grant process, partial funding was provided to congregations on a cost-sharing basis for projects that improve accessibility. The focus was on the many and varied public programs, services, and events that took place in the buildings rather than on worship services. Priority was given to congregations that engaged many older adults and served as a resource for the entire community. The economic feasibility of the proposed projects and the likelihood of successful, timely completion were also considered. AFG eligibility was not restricted by denomination.

» The program operated in six northeastern Illinois counties — Cook, DuPage, Kane, Kendall, Lake, and McHenry. This included the city of Chicago, its suburbs and exurbs, and some rural areas.

- » The Foundation awarded 176 grants totaling \$3.8 million. As a cost-sharing program, these grant awards leveraged an additional \$18.9 million. Several grantees completed more than one accessibility project.
- » As a result of the AFG program, 51 congregations now have accessible entrances including exterior ramps, elevators, or platform lifts.
- » New interior elevators or platform lifts now allow 85 congregations to use multiple levels of their facilities for activities.
- » Where there were previously no accessible restrooms, 65 houses of worship can now respectfully welcome everyone.
- » Older adults with hearing loss previously excluded from events can now fully participate because 10 congregations installed assistive listening systems or hearing loops.

Accessible Faith Grant Program Outcomes

After receiving AFG funding from RRF to complete the initial project, houses of worship indicated that it was easier to raise funds from congregation and community members for subsequent accessibility projects. Now that accessibility was no longer a barrier to participation, congregations were finally able to initiate programs they had wanted to offer for years. At one house of worship, a lower level activity room made accessible by a new platform lift could now be reached by everyone for social services and events, such as blood pressure screenings, community meetings, blood donation drives, grief support groups, and food pantries. Project completion sometimes meant that a building now complied with legal mandates for accessibility and could finally qualify as a venue for government-supported homeless shelters, English as a Second Language (ESL) and citizenship classes, congregate dining centers, and immunization sites.

AFG recipients realized an extra benefit as their accessible facility became more attractive to outside groups seeking temporary or permanent sites. This meant increased revenue for some congregations.

The Accessible Faith Grant program operated for 13 years and far exceeded the typical lifespan of RRF's other special initiatives. In 2015, acknowledging that the AFG program had demonstrated its effectiveness and produced a replicable model, RRF formally closed it.

An Invitation to You

We invite you to read about the AFG program's outcomes, successes, and its straightforward operation. The model is very transferable — essentially turnkey. Not only can it be used for improving accessibility in houses of worship, but it also can improve accessibility in facilities used by other not-for-profit entities that unintentionally exclude participation. For people of all ages with visible or non-visible disabilities, essential programs and services like community meals, domestic violence shelters, and mental health counseling are often off-limits because of site inaccessibility. This is not due to intentional discrimination by program operators, but rather because of the inherent effects of an older, inaccessible building. The AFG program demonstrates a reasonable and effective remedy to this problem. It also shows how a modest one-time grant can have a visible, measurable, and long-lasting benefit for the most vulnerable members of the community.

IF YOU ARE INTERESTED in developing a comparable accessibility program, please contact info@rrf.org to learn about additional information and tools available from RRF.



2

Background and Program Rationale

Socialization and Aging

Physical and social activities contribute to a higher quality of life for everyone and are especially important for older adults. Research shows that religious activity is an important factor in successful aging and contributes to longevity. Even in these modern times, religious participation increases as adults age. In fact, involvement in religious organizations is the most common type of voluntary social activity among older people.

Congregation memberships are aging faster than the general population. Data from AFG applicants showed that more than 50% of their congregation members were seniors. In comparison, seniors represented only 10–15% of the total population in the six counties served by the AFG program.

Many houses of worship serve as free or low-cost sites for essential services and programs and are vital community resources. In 1997, Partners for Sacred Places, a national not-for-profit organization,



conducted a study in six cities of more than 100 congregations operating out of pre-1940 buildings that were virtually inaccessible.

The study, *Sacred Places at Risk*, calculated the monetary value of the space and volunteer time donated by congregations for community social services. Some of these were organized by the congregations themselves; others were sponsored and run by independent not-for-profit organizations.

The findings were striking:

- » More than 90% of the congregations in the study opened their doors to the larger community, sponsoring four ongoing community service programs on average. More than 75% of the congregations met basic human needs for people in their area through food pantries and clothing giveaways.
- » Congregation members provided approximately 5,300 hours of volunteer services to the entire community annually — roughly equivalent to the work of 2.5 full-time employees.
- » Calculating the value of the congregation's volunteer time, space, utilities, and any donated goods used for community-wide services, the average annual contribution to the community by each individual congregation was approximately \$140,000 (in 1997 dollars).
- » Equally important, 80% of those benefiting from these services were not members of the congregations. "In effect, sacred places serve as de facto neighborhood community centers."

Access to Opportunities

The study also found that houses of worship were conscious of their facility's inaccessibility and saw how it prevented older people from participating in activities or events in their buildings. They were greatly concerned that many seniors and community members with disabilities were excluded from the important, even urgent, social services housed in their facilities.

Congregation members understood that facility inaccessibility interfered with their social justice mission. They wanted to remedy the situation, but older buildings desperately awaiting tuckpointing, a new heating system, or roof repairs already had greater capital improvement needs than the congregations could support, so accessibility renovations were moved to the back burner.

The research findings documented by Partners for Sacred Places sparked RRF's interest in finding a way to improve the ability of older adults to access the varied, needed programs offered in religious facilities.



3

Modest Investment from RRF = Major Community Impact

Large Numbers of People Served for Decades to Come

During the AFG program's 13-year history, RRF awarded 176 grants totaling almost \$4 million. The grantee congregations represented 21 different denominations with nearly 236,000 members. Just over 80% of the grants (n=142) were awarded to congregations in Cook County, which comprises 62% of the total population of the six-county AFG area; 89 of these congregations were located in Chicago. The remaining 34 grants were awarded to houses of worship in the other five counties.

The benefits of the accessibility improvements funded by RRF are enduring. New elevators, platform lifts, ramps, and accessible restrooms will continue to benefit older adults and people with disabilities for generations. Because of the AFG program, social services, health programs, training sessions, fellowship groups, and other events in many houses of worship will no longer exclude some of the community's most vulnerable members.

Leveraging Additional Financial Resources

Another significant benefit was the cost-sharing aspect of the AFG program which helped recipients raise substantial additional funds.

The amount of an AFG grant award was for up to 50% of the project cost, but could not exceed \$30,000, requiring at least a 2:1 cost share ratio. Many projects, such as installing an elevator or renovating washrooms for accessibility, cost more than \$100,000.

The \$30,000 grant from RRF served as seed funding and inspired congregations to raise more funding than they had previously imagined was possible.

During AFG's duration, nearly \$19 million was raised over and above the \$4 million awarded by RRF.

Success Breeds Success

Along with directly leveraging additional dollars to complete the funded project, many congregations were inspired to undertake more accessibility improvements. After successfully completing the first project and seeing the difference it made, members were often eager to remove additional barriers.

The initial project provided them with experience in construction or renovation and allowed future projects to be handled more expeditiously.

When congregation members and visitors saw the visible outcome of the initial accessibility project and its direct benefits, it was less difficult to raise funds for future projects.

"The Foundation's Accessible Faith Grant seeded the project in the minds and hearts of our parish leadership and members, provided the kick-start necessary to generate the additional funds, and insured the viability of the [platform lift] project's goal."

DIVINE SAVIOR CHURCH, NORRIDGE

4

Program Operations

Costs

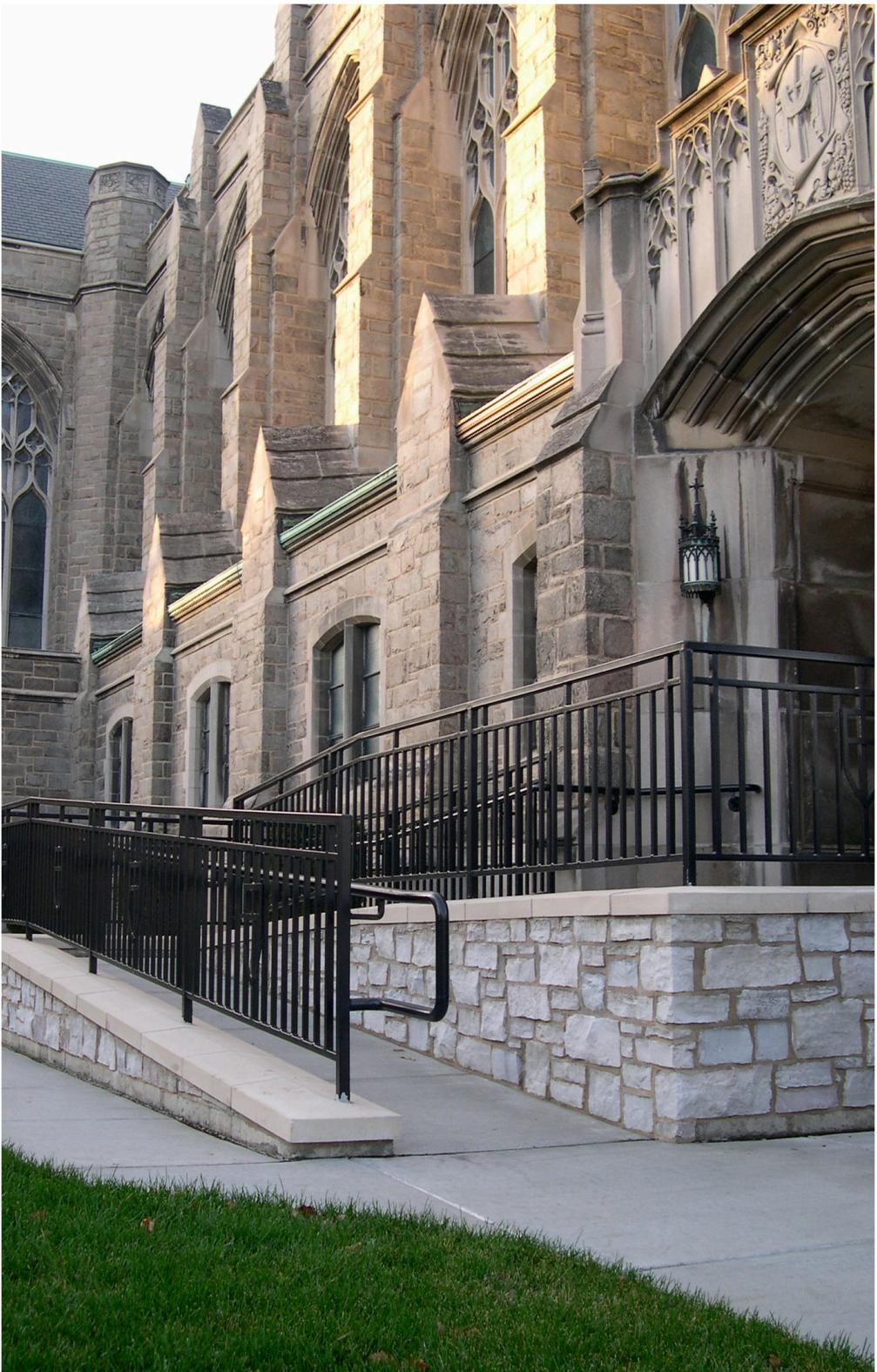
Operating expenses for this program were modest. They included a portion of time from Foundation staff members, and a technical consultant to review applications.

RRF Personnel

The amount of staff time required for AFG was minimal. Less than 10% of a program manager and 15% of administrative assistance was needed to operate the program.

Accessibility Technical Consultant

Since RRF did not have in-house expertise on architecture and accessibility code requirements, the Foundation contracted with an outside specialist with ADA expertise for technical review of AFG applications. RRF and the technical consultant agreed on a fixed rate for reviewing and writing a report for each application. The consulting agreement specified a maximum number of hours to be billed at a set hourly rate



to cover the consultant's time if additional program-related support was needed.

When the program launched, the technical consultant incurred additional time to develop and revise the AFG application, create technical assistance materials, and help establish practices and procedures for application review. RRF will share AFG tools with interested funders, so initial start-up costs would be minimal for organizations looking to replicate AFG. RRF also can assist organizations looking to identify an appropriate accessibility technical consultant.

Printing and Postage

In its first years of operation, AFG communications with potential applicants and grantees were sent via U.S. mail. Initially, there were expenses for marketing letters, outgoing application forms, grant award letters, and reminder notices about interim or final reports.

The Foundation also funded the development, printing, and mailing of two guides on planning and implementing accessibility projects for houses of worship — the first was a national guide and the second was specific to Illinois.

In later years, almost all program communication and marketing was accomplished through email and the RRF website, so printing and post-

"Prior to construction of the lift ramp and new entrance, the homeless or marginally housed neighbors who couldn't walk up steps had to eat or sit outside in the cold during the weekly outreach program. Now, they come in and eat and stay warm."

ALL SAINTS EPISCOPAL CHURCH, CHICAGO

age costs became negligible. Today, a similar program would incur minimal cost for these items.

Types of Requests

The words "accessibility" or "disability" often elicit the image of a wheelchair user, but many older people have other disabling conditions, as well. Some use wheelchairs or three-wheeled scooters for mobility, thus stairs and narrow doorways are definite barriers. However, stairs and other inaccessible features are also barriers for people with conditions that may not be visible, such as heart failure, chronic obstructive pulmonary disease, and severely arthritic hips or knees. Significantly diminished balance, hearing, and vision, along with bladder or bowel problems, can be companions of aging. When confronted by architectural barriers, people with these conditions cannot fully participate in events. The AFG program considered applications for various types of accessibility improvements, not only those that remedied problems for wheelchair users.



Exclusions and Ineligible Projects

Funding was available for *intentional accessibility improvement projects in existing facilities*, such as building a ramp or renovating a restroom for accessibility. Applications for constructing a new building or an overall building renovation were ineligible. New construction and overall facility renovations are not considered intentional accessibility improvements because there is no choice about providing full accessibility. Federal regulations require that these types of projects are designed and built

to meet all accessibility code standards, just as they are also legally required to meet all fire and plumbing code standards. The goal of AFG was to improve accessibility in existing buildings where doing so was legally optional, but greatly needed and desired by the applicant.

Three specific projects were ineligible:

Chairlifts were not eligible because they do not provide accessibility for everyone. A person using a wheelchair would have to get out of the wheelchair and move to the chairlift seat, which is not always possible. This would also require another adult who could carry the wheelchair up or down stairs, so it would be ready for the person using the chairlift. A chairlift may be fine for an individual's home, but it does not meet legal standards in a facility used by the public. Note, however, that an inclined or vertical platform lift may be used, along with a conventional elevator or a "limited use/limited availability" (LU/LA) elevator.

Temporary ramps were not permitted because they are often installed in ways that do not meet accessibility standards. This could create dangerous situations for the ramp users and present other hazards if they obstruct exit routes and/or violate fire codes.

Used equipment was ineligible because the prior user may not have done regular maintenance. Therefore, the item may not meet safety and performance requirements.

"The parish prides itself on being welcoming and open to all, though inaccessibility was a major stumbling block before the Accessible Faith grant."

ST. CATHERINE OF SIENA-ST. LUCY PARISH, OAK PARK



5

Grant Application

Non-Profit Eligibility and Congregation Financials

AFG applicants, like all organizations applying for RRF grants, were required to provide evidence of not-for-profit status. They also had to provide a copy of the financial report for the most recent fiscal year which included a detailed description of income and expenses and demonstrated sound financial management.

AFG was a competitive, needs-based, cost-sharing program. While applicants had to demonstrate financial need to receive funding for the proposed project, they also had to document their ability to raise the balance of the funds needed to complete the project on schedule. The application requested details on plans to raise the balance of project funds and sought information on the congregation's prior fundraising experiences.

Varied Fundraising Strategies

Most applicants planned a mix of fundraising strategies. Some were familiar, such as solicitation of higher income members or local



businesses, a focused capital campaign, and events like raffles or dinner dances. Project fundraising also showed the creativity and humor of volunteers and staff members. One congregation's successful campaign for an accessible restroom project was promoted as "All God's People Gotta Go!"

Unlike many other projects funded by the Foundation, the AFG application did not need income projections beyond the 18- to 24-month term of the grant because an accessibility project was a one-time expense with the exception of small inspection and maintenance fees. Its benefits would endure for decades without additional funding.

Congregation Demographics

AFG applicants provided demographic data on congregation membership. If congregations did not specifically collect this information, they were asked to provide good faith estimates for the total number of members; number and percentage of older adults; percentage by income categories; and percentage by race and/or ethnicity.

The number and percentage of older adults varied widely. In a small congregation with 100 members, older adults might comprise 70% of the total membership. In the largest ones, with membership exceeding 10,000, perhaps 10%, or 1,000 older adults were members. It might seem that applicants with the highest number of older adults should have received the highest priority in awarding grants, but the decision was more complex. Raw numbers did not tell the whole story. RRF took a wider view that involved looking at the nature of the community in which the facility was located, all the services and activities that took place there, and the ways in which older adults were involved.

Small congregations often held importance in their communities far greater than their apparent size. They were venues for important activities that they themselves offered in addition to activities sponsored by

outside groups. For example, an application from a small rural church reported that it was the publicly designated emergency shelter in the event of a natural disaster, such as a severe storm or flooding. In a low-income, urban neighborhood, a congregation with a relatively small number of members was the site for a homeless shelter, many daily 12-step group meetings, a mental health daytime drop-in program, a busy food pantry, and a clothing give-away project. Though the number of older adult members was smaller than in a large congregation, high priority was given to this funding request because of the large number of elders in the community served by critical programs that took place in the facility.

Services, Programs, and Activities

The ways in which a congregation assisted and involved its older members and elders in the community was of paramount consideration in awarding a grant. However, applicants usually had no idea about how much they did. Accurately describing this required congregations to examine themselves differently. To assist with this process, the application included a table which asked congregations to list the name and brief description of each activity, program, event, or service the congregation offered, its frequency, and the approximate number of older adults typically participating.

Applicants often needed prompting to consider more fully all the roles of elders in their congregation and community. They were asked, for example, whether older members were volunteers in fundraising events, coordinators of book clubs and movie nights, or volunteer teachers in their youth education projects. "Are any seniors on your congregation's governance or welcoming committee?" "Do any seniors work at your food pantry or are some of them food pantry clients?" After giving this additional consideration, almost every applicant submitted a more complete list that fully described all the ways older people were involved.

Similarly, the application solicited information on programs, events, and

social services at the facility that were sponsored by outside groups. Again, many applicants under-reported their activities and were encouraged to re-evaluate their initial list. They often failed to report, for example, older adults as volunteers or guests when the facility was used as a homeless shelter, or that ESL classes held in their building included older adults as students or instructors. After discussions, they were often surprised about the many different ways older people from the larger community were active in their building.

Facilities were used in interesting ways such as a satellite site for local college classes or rehearsal and performance space for a community orchestra or theater company. In small towns and disadvantaged neighborhoods, appropriate large public space was often unavailable or beyond most budgets. Houses of worship filled that gap and regularly donated or inexpensively rented out space for events like government public hearings, candidate electoral forums, wedding receptions, or funeral repasts, all of which were attended by older people in the community.

What Comes First?

Describing how their facility involved and served older adults presented a dilemma for many applicants. They said that the number of older people and/or people with disabilities *who did participate* in activities was lower than the number *who would like to participate* because their involvement was impeded specifically by the barrier the accessibility project would remedy.

“We see our members, young and old alike, growing up and growing old with us and need to insure that age and one’s physical circumstances do not hinder them from sharing and contributing to our community.”

RAVENSWOOD BUDLONG JEWISH CONGREGATION, CHICAGO

For example, one congregation offered seated exercise classes, but because the building entrance required ascending stairs, many older adults were unable to attend until a ramp, elevator, or platform lift could solve the accessibility problem. Another sponsored sessions on financial management for retirees, but found that many people stayed home because hearing loss prevented them from participating until an assistive listening system could be installed. Applicants said they wanted to have more offerings for older adults or host more outside groups but felt they could not do so, knowing that many people would be excluded until access was provided.

Defining the Accessibility Problem and its Solution

The Foundation asked applicants to give a clear written explanation of what the accessibility problem was and how the proposed project would solve it.

A typical problem statement would be:

“A lot of people coming for health screenings can’t go down the stairs to the basement so they have to wait upstairs in the vestibule. It takes a long time before the volunteer nurse can get upstairs to them, and the vestibule is not very private or comfortable for the screenings. We want to build a ramp going from the sidewalk down to the basement entrance so we can serve everyone in a better way.”

Because the Foundation could only support a project that met legal requirements and was safe, it was necessary to obtain appropriate technical information to evaluate the project. At first, many applicants did not understand the requirement to submit detailed architectural drawings.

If they were not included with the application, the accessibility technical consultant contacted the applicants. She answered their questions and further clarified the requirement. She also explained its rationale, which was to prove that a project met exact legal accessibility codes.

AFG did not require the full sets of construction documents (blueprints) that code officials would need. Rather the application allowed smaller size drawings as long as they showed all the architectural dimensions and demonstrated that the project met ADA accessibility standards. For example, drawings for a platform lift project had to show specific measurements of the lift and the space where the lift was to be installed to show that the project was indeed feasible — an estimate was not sufficient. Drawings for a new accessible restroom had to show measurements for all features such as the height and depth of the lavatory; the length, mounting height, and exact location of the grab bars; the height of the toilet seat; the toilet's distance from the walls; etc. The accessibility technical consultant examined all of these details to determine if the proposed project met current federal accessibility guidelines and any additional state, county, or individual municipal accessibility standards and appeared to be feasible.

The Foundation strongly urged all applicants to read the resource and technical assistance materials posted on RRF's website. Applicants were also encouraged to share these materials with the project architect or contractor and seek their assistance with the needed architectural and construction details required in the application.

Building Permits

Most accessibility projects require a building permit from the municipality where the congregation is located. A permit is evidence that a proposed project complies with all mandated life safety requirements such as fire, electrical, and plumbing codes, and accessibility standards. Each municipality has its own process for permit applications. Project

contractors typically had responsibility for securing a building permit, although some AFG applicants had not yet signed an agreement with a contractor and were unaware of their project's permit requirements. Applicants were not required to submit a permit with an AFG application. However, in order to alert them about building permit requirements, they were advised to raise the matter with their architect or contractor. The applicant also was required to provide the name and contact information for the municipal department to which the permit application would be submitted. As part of the reporting process described later, grantees were required to submit a copy of the building permit after it was received.

Project Budget

Full, detailed cost estimates for construction projects were required. The application form had a table for major categories of budget items, such as architectural and design fees, materials, equipment, contractor fees, and building permit fees. (Applicants were advised to check with their municipality to see if building permit fees could be waived.) The table included space for other possible costs such as hazardous material remediation if the project involved, for example, removing drywall affected by toxic mold. There are unknowns in all construction projects, especially in older facilities undergoing renovation. One project incurred extra costs and time when excavation for the new elevator pit unearthed an unknown buried oil tank. The appropriate way to mitigate such financial shocks was to include a "contingency" budget category, which represented 10% to 15% of the total project cost. Applicants were encouraged to discuss this with their architect or contractor and include an appropriate figure in the budget table.

Official cost documentation from the project contractor, architect, supplier, and/or installer was also required. This was to ensure that the budget reported in the application was based on responsible estimates

by knowledgeable professionals and included all likely expenses, not simply a hunch or verbal commitment.

Photos

Because the six-county AFG area spanned more than 500 square miles, site visits were not feasible. The application therefore requested “before” photos that clearly showed the accessibility problem. These were used later as comparisons to the “after” photos documenting project completion.

Assistance and Resources for Applicants

A congregation’s primary clergy, staff members, and willing volunteers rarely had experience with accessibility projects. As one pastor said, “*In the seminary, I studied moral codes, not building codes.*” Likewise, they were often novices in seeking grants.

The AFG application process accommodated this situation in several ways. Rather than expecting applicants to include all the necessary information in an open-ended narrative, the application was mostly a fill-in form with very specific questions to answer. There was a longer than usual lead-time between the annual AFG announcement of funds and the deadline for submitting applications.

Applicants were also encouraged to consult RRF’s AFG webpage where they could find many resources on developing an appropriate accessibility project and completing an application.

Resources from the AFG webpage:

- » RRF published a national guide that helps congregations plan and implement accessibility projects. [Accessible Faith: A Technical Guide for Accessibility in Houses of Worship](#)

Note: Referenced accessibility standards are those that were in

effect at the time, the 1991 *Americans with Disabilities Act Accessibility Guidelines (ADAAG)*. ADAAG was superseded by the 2010 Standards, which went into effect on March 15, 2012. A brief comment about this was added to the electronic version of the national guide to alert readers to consult the new standards.

- » Another RRF publication shows congregations how to increase awareness of their accessibility improvements to encourage people who need them to use them. [Maximizing Your Accessibility Improvements](#)
- » Sample [Accessible Faith Grant Application Form](#)
- » The American Institute of Architects has guidance on selecting and working with an architect as well as information on project budgets and contracts. www.aia.org
- » *Inclusion in Worship* has extensive information on accessibility and inclusion for all denominations. <https://pathways.org/tools-resources/inclusion-worship/>
- » ADA Technical Assistance Centers provide free information and technical assistance and training on the Americans with Disabilities Act (ADA). Questions can be submitted online and by phone, anonymously if desired. The list of Centers for each federal region and contact information is at <http://adata.org/>
- » Local Better Business Bureaus provide a way for applicants to check on architects, contractors, vendors, and suppliers before making commitments. www.bbb.org

Consistent with the Foundation’s application-friendly practices, the AFG program manager and accessibility technical consultant fielded frequent calls and emails from potential applicants to answer questions and provide guidance about the process.

6

Project Monitoring and Reporting

Interim Reports

Grants were accompanied by a cover letter which listed project deadlines and reporting requirements. Accessibility equipment projects had a 12-month project completion deadline and required a six-month interim report, followed by a final report at the end. Since they were larger and more complex, construction or renovation projects were given an 18-month deadline. Interim reports were required at six and 12 months, followed by a final report.

Most AFG recipients were receiving their first grants, so the interim reports worked as an early monitoring system for the Foundation and for grantees. The AFG program manager reviewed all reports and followed-up if there were project modifications, changes in scope, significant problems, or extensive delays.



Project Delays

Any construction or remodeling project can end up taking longer than initially planned. Typical and understandable delays related to AFG projects include:

Contractor Issues

For some contractors, even a \$350,000 elevator installation was a small project. After being awarded the contract, some vendors might put the work on the back burner, attending to it during downtime on larger projects.

Unknowns

Renovations in older buildings often involved surprises that interfered with construction schedules. For example, during one restroom renovation, old fragile asbestos tile was found under newer floor covering; the project was stopped until critical asbestos mitigation occurred. Another common problem was that original architectural plans and records of renovations of older facilities were often lost. When demolition was needed in order to build a new accessible entrance or interior platform lift, unknown walls-behind-walls were often found, along with unexpected electrical or plumbing conditions that needed remediation.

Building Permits

Each municipality processed building permit applications differently, though all involved having detailed construction documents (blueprints) reviewed by health and life safety code specialists, e.g., electrical, plumbing, accessibility, and fire safety. Depending on the municipality and the complexity of the proposed accessibility project, obtaining a permit could take longer than the congregation or its contractor expected. If the permit reviewers found oversights or errors in the construction documents, corrections had to be made and plans resubmitted.

A project in a building with a local, state, or federal historic designation usually needed an additional review, which could further delay approval.

This was especially true if the project was a ramp or platform lift that affected the building's exterior. Historic preservation officials occasionally required modification to the project design.

Weather

The AFG program operated in six counties in the Chicago area, so weather often delayed projects. Cold temperatures, snow, and rain could prevent pouring concrete for a new ramp or sidewalk or interfere with constructing a new accessible entrance. Some grantees, however, experienced delays that often could have been prevented:

Changes in Scope

In some cases, a small committee developed the accessibility project and applied for the grant. When this resulted in an AFG award, other congregation members suddenly took note. They often had new ideas, and projects sometimes ended up being revised, which required redesign and rebidding. Their interest and ideas might have been welcome, but their timing was off, especially when they changed the project scope and increased costs so additional funds had to be raised. The AFG program manager investigated these situations to determine whether the change was appropriate.

Fundraising Difficulties

AFG provided up to 50% of a project's total cost, but not more than \$30,000. A few grantees had difficulty raising the balance of the project cost because of poor planning or execution of their fundraising strategies. This delayed paying contractors and consequently delayed project completion.

Overreliance on Volunteers

In most cases, architects or construction managers oversaw the accessibility project and the contractor. However, some grantees relied on volunteers who lacked the time or experience to oversee a contractor's performance, so projects fell behind schedule.

Whether a delay was for an understandable reason or not, the Foundation wanted the grantees to succeed in completing their accessibility project and usually allowed a no-cost extension. However, no additional funding was provided even if project costs had increased. When requesting an extension, the grantee had to submit a revised project budget and realistic timetable along with a revised fundraising plan. They were reviewed by the AFG program manager who recommended whether or not to authorize the extension.

Final Reports and Project Outcomes

Final reports required information on actual costs compared to original estimates and an explanation of any variances of 10% or more. The process of completing the project was described, including any problems, delays, or unexpected occurrences. Photos of completed projects were also submitted.

Grantees reported on how the new accessibility project affected members of the congregation and the community, such as increased attendance or participation by older adults, comments from members or visitors on the improved access, or initiation of new programs now that the space was accessible to everyone who would want to participate.

RRF was especially interested in learning about new connections the project made possible, such as additional outside entities wanting to use the space or executing new space-sharing agreements. Grantees sometimes reported that their facility could now host government-funded programs that required accessible sites. Due to their building's

“Genuine pride exuded in completing a long-awaited and anticipated project. Completion has encouraged our parishioners with new energy and vitality.”

OUR LADY OF PEACE CHURCH, CHICAGO

prior inaccessibility, some had lost a program like subsidized congregate senior meals, but had the program restored when the AFG project was completed. The final report also sought grantees' advice for other houses of worship planning a similar project. RRF used this valuable, first-hand feedback to improve the technical assistance materials on AFG's webpage.

Marketing and Publicizing the Accessible Faith Grant Program

Since the AFG program was new and unfamiliar to many houses of worship, RRF implemented a thorough marketing program. Information about AFG was sent to congregations involved in the Foundation's earlier Congregation Connections and ENCORE programs, as well as:

- » Other funders, particularly local community foundations and funders with priorities in aging or disability issues
- » A mailing list of houses of worship within the six-county area developed from telephone directories and internet searches
- » Regional and national religious denominational headquarters
- » Area Agencies on Aging and senior centers in the six-county region, as well as social service agencies and health care systems with wide connections in their communities
- » Professional architectural organizations and firms specializing in accessibility or in designing houses of worship
- » Disability-related organizations, such as the Centers for Independent Living, in each county
- » Local government officials — county, municipal, city, or village executives and council representatives

When the AFG program started in 2003, email could not be used to communicate with many congregations because few had email addresses. Thus the first publicity was by U.S. mail. As electronic communication became the norm, more potential applicants were reached faster and with lower cost. A program description was also placed on the RRF website with links for downloading applications.

RRF also developed and printed a four-color flyer for the AFG program which was posted on the Foundation's website and shared in email messages. Foundation staff distributed the flyer at meetings where there might be potential applicants or other interested parties.

An unanticipated outcome of AFG promotional efforts was that RRF received calls from congregations all over the U.S. asking about submitting an application or if there was an equivalent program in their region. Unfortunately, RRF was not able to locate any comparable programs. Congregations were often referred to their denominational offices which sometimes provided small grants for accessibility projects.



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Moving Forward

Although RRF formally closed the Accessible Faith Grant program in 2016, the Foundation continues to consider accessibility requests through its regular grant program on a case-by-case basis.

We encourage you to develop a version of the AFG program for your own community. Consider this:

- » The program is transferable and readily replicable, especially since RRF will freely share its materials, experience, and advice.
- » It is easily scalable and could be initiated as a pilot program in a small geographic area, if desired.
- » AFG processes are readily adaptable to accessibility projects for other facilities that house programs funders already support, such as homeless or domestic violence shelters, health centers, social service agencies, or training centers. Many of these operate with tight budgets and use space in older buildings that probably have many accessibility barriers.

- » A single grant award brings visible, measurable results that last for decades.

Houses of worship are widely respected as places of hope, community connectors, and safe spaces. For a modest investment, you can help open doors to a better quality of life and create strong communities through neighborhood-based programs and services that are accessible to all. Help congregations truly stand behind the words that greet visitors at houses of worship everywhere, “All are welcome.”

IF YOU WOULD LIKE MORE INFORMATION about the AFG program and how RRF could assist you in developing a similar program of your own, please contact info@rrf.org.

RRF will be pleased to share its AFG materials and procedures so you can adopt or adapt them for your purposes.

The Retirement Research Foundation (RRF) is one of the first private foundations devoted exclusively to aging and retirement issues. Its mission is to improve the quality of life for our nation’s elders. Based in Chicago, RRF was founded in 1950 by entrepreneur and philanthropist, John D. MacArthur. Grantmaking began in 1978.

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