HERITAGE SUPPORT GRANTS
PROJECT GRANTS

Heritage Support Grants
Made possible by Lilly Endowment Inc
OBJECTIVES

• Cover basic components of Project grant application
• Clarify questions in application
PROJECT GRANTS

• $5,000 - $50,000
• 15% cash match
• 100% board support
• 12 month grant cycle
• Two-part process
GUIDELINES

Eligibility
• Be incorporated in the State of Indiana as 501(c)3 nonprofit corporation
• Reflect history as significant component of organizational mission and/or propose history-focused project
  • Interpret, present or otherwise disseminate historical narrative or information
• Annual budget of less than $300,000
• Friends groups

Funding priorities
• Collections stewardship
  • Storage, management, care and documentation
• Diversity, Equity, Access and Inclusion
  • Ensure diverse individuals fully participate in all aspects of organizational efforts
• Sustainability
  • Sets the organization up for greater capacity to take important next steps to remain stable and relevant in the future
• Planning
  • Identify organizational objectives, assess organizational capacity
GRANT PORTAL

- Start application
SUMMARY OF PROPOSAL

- Registration info
- Project details
- Project narrative
- Fundraising questions
PROJECT DETAILS

• Project overview
  • Title
  • Request amount
  • Start/end dates

• Project team
  • Project manager and contact info
  • Grant application info
  • Project team members

Project Overview

- Project Title: Text
- Total Amount Requested: $50,000.00
- Project Start Date: 7/1/2020
- Project End Date: 6/30/2021

Project Team

- Project Manager Name/Title: HSG Test
- Project Manager Contact Information: Text
- Name/Title of Grant Applicant (if different from Project Manager): Text
- Other Project Team Members: Text
PROJECT NARRATIVE

- Preview of project
- Abstract or executive summary
- Demonstrate:
  - Logical plan to address critical need
  - Resources to successfully compete project with grant funding
  - Fit within funding priorities and eligibility
PROJECT NARRATIVE

1. Project summary
2. Partners
3. Building ownership
4. Fund management
PROJECT SUMMARY

- Logical and interconnected
- Impact should focus on benefit to community
Additional questions

- Co-sponsors and partners
- Building ownership
- Fund management
FUNDRAISING CAPACITY

• Primarily used for data collection
• Reviewers want to see ability to manage grants
• Answer to the best of your ability
FULL PROPOSAL

- Institutional Readiness
- Evidence of Need
- Project Logic
- Implementation
- Evaluation
- Sustainability
- Attachments
- Budget
INSTITUTIONAL READINESS

Right time, right place = success

• History/accomplishments
• Programming/activities
• Facilities
• Community engagement/base of support
• Qualifications of key people
• External assessments and training
EVIDENCE OF NEED

• Define situation/problem
• Provide context
• Explain cause and effect
• Use facts and evidence to support
PROJECT LOGIC

Your planned work

- Objectives
- Inputs
- Activities

Your intended results

- Outputs
- Outcomes
- Impact
IMPLEMENTATION

• Process and plan development
• Illustrate how project will be accomplished
• Outline project team responsibilities
• Set timeline and define critical project milestones (outcome indicators)
EVALUATION

• Track and measure change
• Continuous feedback to improve
• Start small and learn from there
• Priorities:
  1. What do you need to know to make decisions?
  2. How can you best collect and understand info?
SUSTAINABILITY

• Fit with long-term goals
• How outputs will contribute
• Highlight logical next steps
• Continued momentum
• Attract and diversify funding

BUDGET JUSTIFICATION

• Explain expenses with enough details to justify inclusion in project
• Clarify how calculations were made (if needed)
• Follow same order as itemized budget
• Make sure everything in budget and proposal match up
CASH MATCH

• Project Grant requires 15% cash-match
• Gives organization more practice with fundraising
• Project-specific funds from new fundraising
• Matching funds can’t:
  • Come from org’s general or rainy day accounts
  • Come from in-kind donations or cost-sharing

CASH MATCH

• Calculated in addition to your total request
  • Ex: Grant request = $10,000, Cash match = $1,500, Project total = $11,500

• Total amount must be secured by end of grant cycle
  • Can start fundraising 4 months prior to grant deadline

• Sources must be documented
SOURCES OF FUNDING

- Community appeal or drive
- Major gifts
- Special events
- Other grants
- Consider first steps
  - Existing relationships
  - Benefits
  - Risks
BOARD SUPPORT

• 100% board support required for all project grants
• Board support can be financial contributions, volunteer time or a combination of the two.
ADDITIONAL DOCUMENTS

Required
- Operating budget
- Project budget
  - Using HSG template
- 501(c)3 status letter
- Board list
- Friends groups

Optional, but highly recommended
- Supporting documents
- Up to 2 letters of support

To add a document, click the green + icon.
ORGANIZATIONAL BUDGET

• Can be in your format of choice
• Help reviewers understand your organization
• Prove financial solvency
• Put proposed project into perspective
PROJECT BUDGET

• HSG template required
• Detailed, tracked and changed
• Line item account of expenses and income
• Income
  • HSG funds
  • Other funding
• Expenses
  • Approved for direct costs only

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SUBMITTING

- Attached documents
- Share draft with colleague for editing
- Print final copy
- On time
PARTIAL FUNDING

• Competitive grant program
• Phase projects or clearly identify priorities
• Have a plan B
THANK YOU!

• General inquiries: Tamara Hemmerlein
  • (317) 234-0170
  • themmerlein@indianahistory.org

• Grant and training inquiries: Bryce Gorman
  • (317) 234-9514
  • BGorman@indianahistory.org