HERITAGE SUPPORT GRANTS
OVERVIEW

Heritage Support Grants
Made possible by Lilly Endowment Inc
OBJECTIVES

• Provide Heritage Support Grants overview
• Explore online grant portal

The objective of the Heritage Support Grants program is to advance the care of and access to history in Indiana, while increasing the capacity of organizations that carry out this work
HSG OVERVIEW
BACKGROUND

• Made possible by Lilly Endowment Inc grant
• $2.5 million in re-grants to Indiana historical organizations
• Education is essential
  • Fundraising workshops
  • Coaching
  • Review panel spots for Local History Partners
HERITAGE SUPPORT GRANTS

Mini Grants
• $500 - $4,999
• No cash match required
• 11 month grant cycle
• One-part process

Project Grants
• $5,000 - $50,000
• 15% cash match
• 100% board support
• 12 month grant cycle
• Two-part process
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 a historical narrative or information

• Have an annual budget of less than $300,000

*An organization that operates under a larger parent organization is eligible only through a “friends group”
FRIENDS GROUP

• Required to supply a letter from their parent organization confirming
  • Parent organization supports the project and application for grant funding
  • Representative of the friends group is on the grant project team
  • HSG funds will be held and disbursed by the friends group
<table>
<thead>
<tr>
<th>Collections stewardship</th>
<th>Diversity, Equity, Access and Inclusion</th>
<th>Sustainability</th>
<th>Planning</th>
</tr>
</thead>
<tbody>
<tr>
<td>Storage, management, care and documentation</td>
<td>Ensure diverse individuals fully participate in all aspects of work</td>
<td>Meet the needs of the present without compromising its ability to meet future needs</td>
<td>Identify organizational objectives</td>
</tr>
<tr>
<td>Structures and landscapes considered if primarily used to facilitate historical interpretation</td>
<td>Broaden organization beyond public accommodations</td>
<td>Sets the organization up for greater capacity to take important next steps</td>
<td>Assess organizational capacity</td>
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<tr>
<td></td>
<td>Work to achieve genuine inclusion</td>
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</table>

WE DO HISTORY
INDIANA HISTORICAL SOCIETY
## FUNDING EXCLUSIONS

<table>
<thead>
<tr>
<th>General operating support</th>
<th>Rent or mortgage</th>
<th>Salaries, wages, benefits for permanent staff</th>
</tr>
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<tbody>
<tr>
<td>Insurance</td>
<td>Endowment building</td>
<td>Items for resale</td>
</tr>
<tr>
<td>Utilities</td>
<td>Building purchase</td>
<td>Retiring organizational debt</td>
</tr>
</tbody>
</table>
COACHES

• Assigned after online grant portal registration
• Answer questions and provide feedback throughout process
• NOT involved with grant review panels
• Provide support throughout project implementation and reporting
PROFESSIONAL STANDARDS

• Projects must adhere to or help organization meet accepted professional standards

• Organization expected to have or obtain necessary professional expertise to carry out proposed project

• Refer to set standards and guidelines and/or contact your coach if you need assistance
### WEBSITE

https://indianahistory.org/grants

<table>
<thead>
<tr>
<th>Resources</th>
<th>Guidelines</th>
<th>Training</th>
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<tr>
<td>• AASLH StEPs info</td>
<td>• Grant deadlines</td>
<td>• Workshops</td>
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<tr>
<td>• Templates</td>
<td>• Eligibility</td>
<td>• Webinars</td>
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<td>• Glossaries</td>
<td>• Funding priorities</td>
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<td></td>
<td>• Application information</td>
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<td></td>
<td>• Staff contact</td>
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ONLINE GRANT PORTAL
GRANT PORTAL

Use Google Chrome browser

Take eligibility quiz

Complete registration page and submit

Check email for username and password

Login to access grant portal

Save your work often!

Begin grant application
HOW TO APPLY

Get started today

HERITAGE SUPPORT GRANT APPLICATIONS

Applications are available only through the online grant portal.

Hard copy (paper) applications will not be accepted.

Registered organizations will be assigned a coach from Local History Services staff who can provide guidance and consultation throughout the grant application process. *

For detailed award dates, grant cycles and deadlines, see Guidelines.

*Please note that while Local History Services coaches are available to assist organizations throughout the grant application process, they are not part of the grant selection process. All grant applications will be evaluated by an external committee. The use of an LHS coach does not guarantee funding.

APPLY FOR A GRANT

Questions?
ELIGIBILITY QUIZ

• Is your organization incorporated in Indiana as a 501(c)3 nonprofit organization?

• Is history a significant part of your organization’s mission and/or is the project clearly history focused?

• Is your annual budget under $300,000?
REGISTRATION

• Organization Profile
  • Contact information
  • Mission, priorities
  • History
• Nonprofit status verified by a member of the grant team
  • One-time process
  • User name and password sent to email

Welcome to the Registration page!
Please answer the questions below. After submission, you will receive a username and password to log in to the Grantee Portal as soon as possible. Each registration is reviewed manually by the Heritage Support Grant team.

Registrations submitted after 4:30 pm may not be reviewed until the next business day.
Welcome to the Heritage Support Grants Portal

Since 1830, the Indiana Historical Society (IHS) has been Indiana’s Storyteller™, connecting people to the past by collecting, preserving, interpreting and sharing the state’s history. To further the role that Indiana’s local, county and regional historical societies, museums and sites play in upholding our state’s heritage, the IHS is pleased to support these organizations in their important work through the establishment of Heritage Support Grants, made possible by Lilly Endowment Inc. To learn more about Heritage Support Grants, please visit our website at www.indianahistory.org/grants.

If you do not have a login, you may start the registration process by clicking on the "Take the Eligibility Quiz" button.

If you already have an account and a password, please log in.

Take the Eligibility Quiz
GRANT PORTAL

- Start application
- Update information
- Access reports

Welcome to the Heritage Support Grants Grantee Portal

Start a Project Grant ($5,000 to $50,000)
Start a Mini Grant ($500 to $4,999)

While working on your proposal, it is recommended that you frequently “Save” your work using the button at the top of the page.

From this webpage, you can:
- Submit a proposal for funding
- Track the status of your pending proposal
- Upload your signed grant agreement
- Review your current grants and report due dates
- Submit reports
- Monitor grant payments

How to use the portal
STARTING THE APPLICATION

- Save work often
  - Separate Word document
- Ethics webinar
  - Required for all applications
FUNDRAISING QUESTIONS

- Primarily used for data collection
- Reviewers want to see ability to manage grants
- Answer to the best of your ability
**BUDGET**

- HSG template required
- Income
  - HSG funds
  - Match
  - Other funding
- Expenses
  - Direct expenses

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<th>Organization Name:</th>
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<tbody>
<tr>
<td>Project Name:</td>
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<td>Project Start Date:</td>
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<td>Project End Date:</td>
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## INCOME

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<th>Difference</th>
<th>Notes</th>
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## EXPENSES

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## BALANCE

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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.
SUBMITTING

• Attached documents
• Share draft with colleague for editing
• Print final copy
• Submit on-time
Review process

- External grant panels
- Review criteria
  - Fit with funding priorities
  - Need and case for support
  - Institutional readiness
  - Project design and implementation
  - Project budget
  - Intended results, evaluation and sustainability

To submit your review, all comment fields must contain text. If you do not have any comments, please enter N/A into the text box.

Reviewer: | Review Date: July 11, 2016
Project Title: | Review Total Score: 6

Please rate the application by the following scoring criteria:

Project Summary
- Summary provides effective and useful overview of proposed project.
- Project proposal identifies and explains important or pressing need for organization.
- Proposed solution is reasonable, planned work is logical and appropriate, professional standards and/or best practices are used as appropriate.
- Intended results are clearly defined, reasonable, and adequately address need.
- Results address change/benefit that will come from successful project completion.

Project Summary Score
- Comments regarding the project summary:

Need and Institutional Readiness
- Organization has capacity and infrastructure to successfully complete project.
- Proposal leverages past accomplishments and current priorities.
- External assets, training and/or professional standards are considered as needed.

Need and Institutional Readiness Score
THANK YOU!

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  - (317) 234-0170
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- Grant and training inquiries: Bryce Gorman
  - (317) 234-9514
  - bgorman@indianahistory.org