

# 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



An aerial photograph of a city square, likely in Indianapolis, featuring a large, ornate monument in the center. The square is surrounded by a circular road and various city buildings. The image is partially obscured by a dark blue overlay on the left side.

# HSG OVERVIEW

**WE DO  
HISTORY.**  
INDIANA HISTORICAL SOCIETY



# 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



## Mini Grant

\$500 - \$4,999

Full Proposal

Review

Grant Award

Final Report  
11 Months

## Project Grant

\$5,000 - \$50,000

Summary of  
Proposal

Invitation for  
full proposal

Full Proposal

Review

Grant Award

Midpoint Report  
6 Months

Final Report  
12 Months



# 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



# FUNDING PRIORITIES

Collections stewardship	Diversity, Equity, Access and Inclusion	Sustainability	Planning
<p>Storage, management, care and documentation</p> <p>Structures and landscapes considered if primarily used to facilitate historical interpretation</p>	<p>Ensure diverse individuals fully participate in all aspects of work</p> <p>Broaden organization beyond public accommodations</p> <p>Work to achieve genuine inclusion</p>	<p>Meet the needs of the present without compromising its ability to meet future needs</p> <p>Sets the organization up for greater capacity to take important next steps</p>	<p>Identify organizational objectives</p> <p>Assess organizational capacity</p>



# FUNDING EXCLUSIONS

General operating support	Rent or mortgage	Salaries, wages, benefits for <u>permanent staff</u>
Insurance	Endowment building	Items for resale
Utilities	Building purchase	Retiring organizational debt



# 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>

Resources	Guidelines	Training
<ul style="list-style-type: none"><li>• AASLH StEPs info</li><li>• Templates</li><li>• Glossaries</li></ul>	<ul style="list-style-type: none"><li>• Grant deadlines</li><li>• Eligibility</li><li>• Funding priorities</li><li>• Application information</li><li>• Staff contact</li></ul>	<ul style="list-style-type: none"><li>• Workshops</li><li>• Webinars</li></ul>



# ONLINE GRANT PORTAL

**WE DO  
HISTORY.**  
INDIANA HISTORICAL SOCIETY





# GRANT PORTAL

Use Google Chrome browser 

Save your work often!

**WE DO  
HISTORY.**  
INDIANA HISTORICAL SOCIETY

Access online grant portal  
through IHS website

Take eligibility quiz

Complete registration  
page and submit

Check email for  
username and password

Login to access grant portal

Begin grant application



# HOW TO APPLY

## How to Apply

GRANTS

### 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?

[Guidelines](#)

[Learn more](#)

[Review Process](#)

[Learn more](#)

[Training](#)

[Learn more](#)

[Resources](#)

[Learn more](#)





# 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?

## WE DO HISTORY. INDIANA HISTORICAL SOCIETY

Welcome to the Heritage Support Grants Portal

Login Now:

Sign in

[Reset or create password](#)

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](http://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 login.

Take the Eligibility Quiz



[Privacy Policy](#) [Accessibility](#)



# 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 login 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.**

First Name

Last Name

Title

Organization Name

Organization Federal Employer Identification Number (EIN)

Organization Email

Organization Phone

Address 1

Address 2

City

Country

United States ▼



# LOGIN

**WE DO  
HISTORY.**  
INDIANA HISTORICAL SOCIETY

## WE DO HISTORY.

INDIANA HISTORICAL SOCIETY

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Take the Eligibility Quiz




[Privacy Policy](#) [Accessibility](#)



# GRANT PORTAL

- Start application
- Update information
- Access reports



FLUXX

- Information
  - Grantee Portal Guid...
- Organizations
  - My Organization
- Users
  - Authorized Users
- Applications
  - Drafts
  - Resubmit
  - Submitted Applications
  - Requests for Revisions
  - Declined Applications
- Grants
  - Active Grants
  - Past Grants
- Reports
  - Reports Due
  - Submitted Reports
  - Request for Revisions
  - Past Reports
- Payments
  - All Payments

## WE DO HISTORY. INDIANA HISTORICAL SOCIETY

### 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




# STARTING THE APPLICATION

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


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 Information


- Grantee Portal Guidelines

 Organizations (1)


- My Organization (1)

 Users (1)


- Authorized Users (1)

 Applications (1)


- Drafts
- Resubmit
- Submitted Applications (1)
- Requests for Revisions
- Declined Applications

 Grants

- Active Grants
- Past Grants


 Reports

- Reports Due
- Submitted Reports
- Request for Revisions
- Past Reports

 Payments

- All Payments

[Change Password](#)  
[Logout](#)

Cancel  Save

## HSG Test

R-2001-03538 |





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### SUMMARY OF PROPOSAL

Organization Mission

File Edit View Format Tools

Formats

**B** *I*    

#### Project Overview

Project Title

Total Amount Requested

Project Start Date

**PLEASE NOTE:** Maximum project length is 1 year. All projects must start on or after the first day of the grant period (7/1/2020). Grants awarded in this cycle must be completed and fully expensed by the last day of the grant period (6/30/2021). Projects may be completed prior to the deadline.

Project End Date

#### Project Team


Project Manager Name/Title

Project Manager Contact Information




# FUNDRAISING QUESTIONS


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

 Information


- Grantee Portal Guidelines

 Organizations


- My Organization

 Users


- Authorized Users

 Applications


- Drafts
- Resubmit
- Submitted Applications
- Requests for Revisions
- Declined Applications

 Grants

- Active Grants
- Past Grants

 Reports

- Reports Due
- Submitted Reports
- Request for Revisions
- Past Reports

 Payments

## FUNDRAISING CAPACITY

*The following questions are for IHS data collection purposes so that we can better understand the fundraising capacity of the organizations we serve.*

How many grants has your organization applied for in the last fiscal year?  
(excluding this Heritage Support Grant application)

How much money has your organization received as a result of grant funding in the last fiscal year?

How much money has your organization raised from non-grant sources in the last fiscal year?

Do you receive money from other fundraising sources? Mark all that apply.

☐ Membership

☐ Annual Giving

☐ Special Events

☐ Major Gifts

☐ Planned Giving

If Other, please specify.



# BUDGET

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

## IHS Heritage Support Grant Budget Template

Organization Name:				
Project Name:				
Project Start Date:				
Project End Date:				
<b>INCOME</b>				
Description	Budgeted	Actual	Difference	Notes
	\$0.00	\$0.00	\$0.00	
	\$0.00	\$0.00	\$0.00	
	\$0.00	\$0.00	\$0.00	
	\$0.00	\$0.00	\$0.00	
	\$0.00	\$0.00	\$0.00	
	\$0.00	\$0.00	\$0.00	
	\$0.00	\$0.00	\$0.00	
Totals	\$0.00	\$0.00	\$0.00	
<b>EXPENSES</b>				
Description	Budgeted	Actual	Differences	Notes
	\$0.00	\$0.00	\$0.00	
	\$0.00	\$0.00	\$0.00	
	\$0.00	\$0.00	\$0.00	
	\$0.00	\$0.00	\$0.00	
	\$0.00	\$0.00	\$0.00	
	\$0.00	\$0.00	\$0.00	
	\$0.00	\$0.00	\$0.00	
	\$0.00	\$0.00	\$0.00	
	\$0.00	\$0.00	\$0.00	
	\$0.00	\$0.00	\$0.00	
Totals	\$0.00	\$0.00	\$0.00	
<b>BALANCE</b>				
	Projected	Remaining	Differences	Notes
	\$0.00	\$0.00	\$0.00	

Add footer



# 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

- My Organization (1)

Users (1)  
- Authorized Users (1)

Applications (1)  
- Drafts  
- Resubmit  
- Submitted Applications (1)  
- Requests for Revisions  
- Declined Applications

Grants  
- Active Grants  
- Past Grants

Reports

### ADDITIONAL DOCUMENTS

The following attachments are **Required** for all applications:

- Annual operating budget (current fiscal year)
- Project budget (using the provided Budget Template)
- Board list with affiliations
- Confirmation of 501(c)(3) status (tax exempt determination letter)
- Any project-specific documents requested by IHS

Additional supporting documents such as contractor estimates, before photos, resumes or job descriptions, historic structures reports, etc., are **highly recommended**.

Organizations may provide up to 2 letters of support.

**Friends group applications are required to supply a letter from their parent organization confirming the following:**

- The parent organization supports the project and application for grant funding.
- A representative of the friends group is on the grant project team.
- HSG funds will be held and disbursed by the friends group.

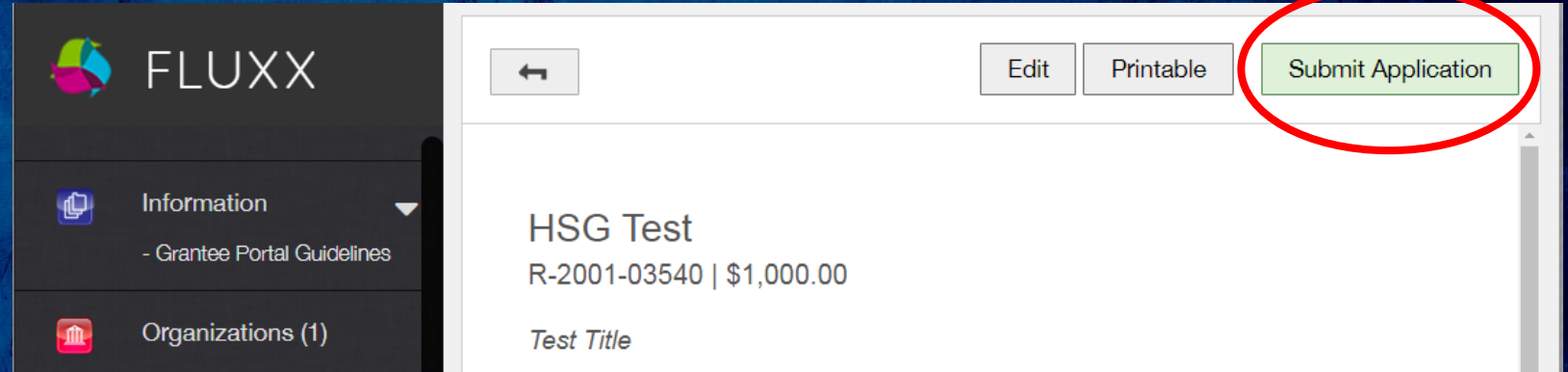
DOCUMENTS

To add a document, click the green + icon.



# SUBMITTING

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



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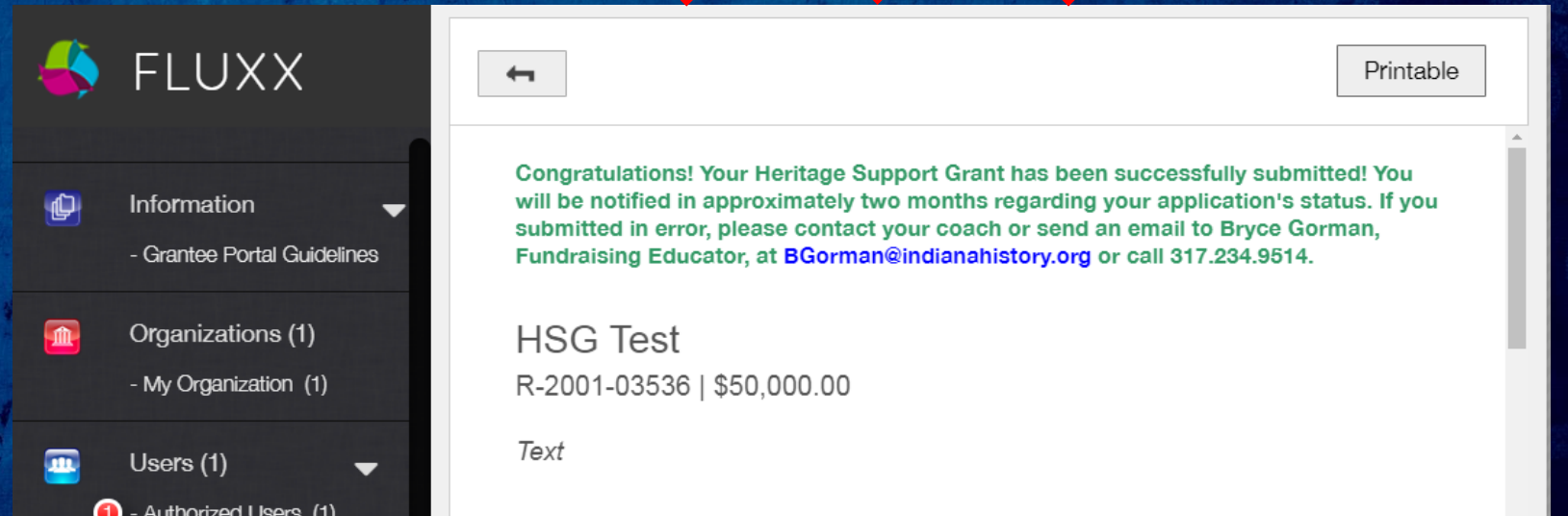
Information  
- Grantee Portal Guidelines

Organizations (1)

HSG Test  
R-2001-03540 | \$1,000.00

Test Title

Edit Printable **Submit Application**



FLUXX

Information  
- Grantee Portal Guidelines

Organizations (1)  
- My Organization (1)

Users (1)  
- Authorized Users (1)

**Congratulations! Your Heritage Support Grant has been successfully submitted! You will be notified in approximately two months regarding your application's status. If you submitted in error, please contact your coach or send an email to Bryce Gorman, Fundraising Educator, at [BGorman@indianahistory.org](mailto:BGorman@indianahistory.org) or call 317.234.9514.**

HSG Test  
R-2001-03536 | \$50,000.00

Text

Printable



# 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 assessments, training and/or professional standards are considered as needed.

Need and Institutional  
Readiness Score



# THANK YOU!

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

