HERITAGE SUPPORT GRANTS OVERVIEW

Heritage Support Grants

Made possible by Lilly Endowment Inc

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INDIANA HISTORICAL SOCIETY

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

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HSG OVERVIEW

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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

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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

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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

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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

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**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

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FUNDING PRIORITIES

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

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FUNDING EXCLUSIONS

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

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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

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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

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WEBSITE

https://indianahistory.org/grants

Resources	Guidelines	Training
• AASLH StEPs info • Templates • Glossaries	• Grant deadlines • Eligibility • Funding priorities • Application information • Staff contact	• Workshops • Webinars

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ONLINE GRANT PORTAL

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GRANT PORTAL

Use Google Chrome browser

Save your work often!

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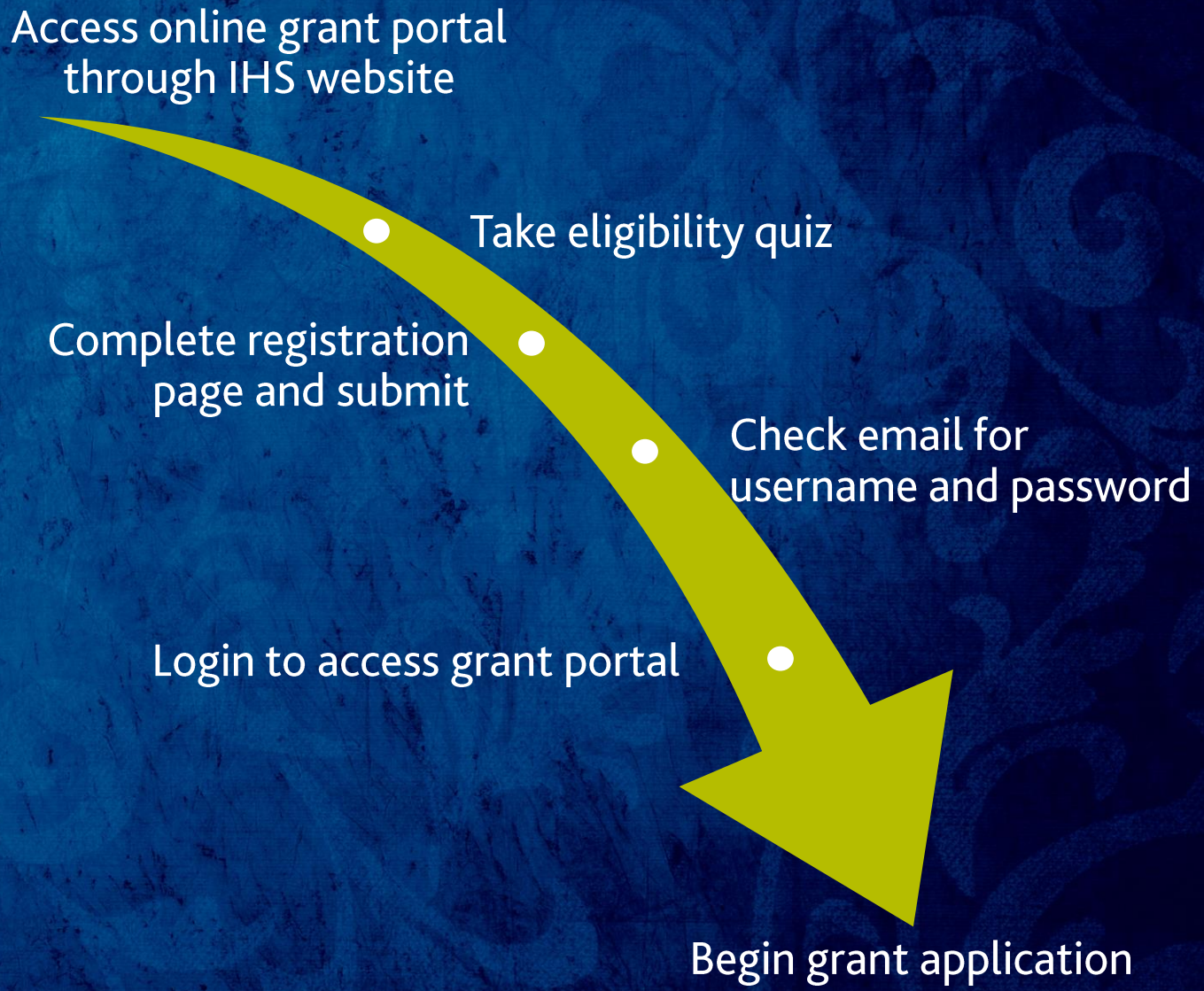

HOW TO APPLY

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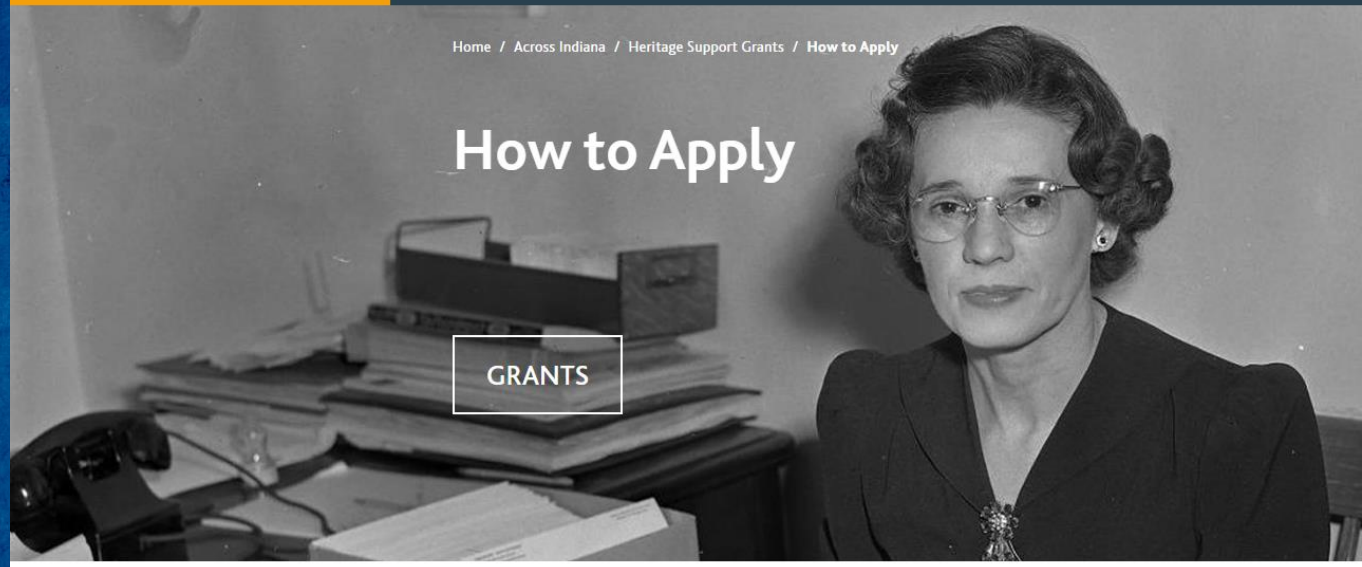
Visit Explore Learn Contribute



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?

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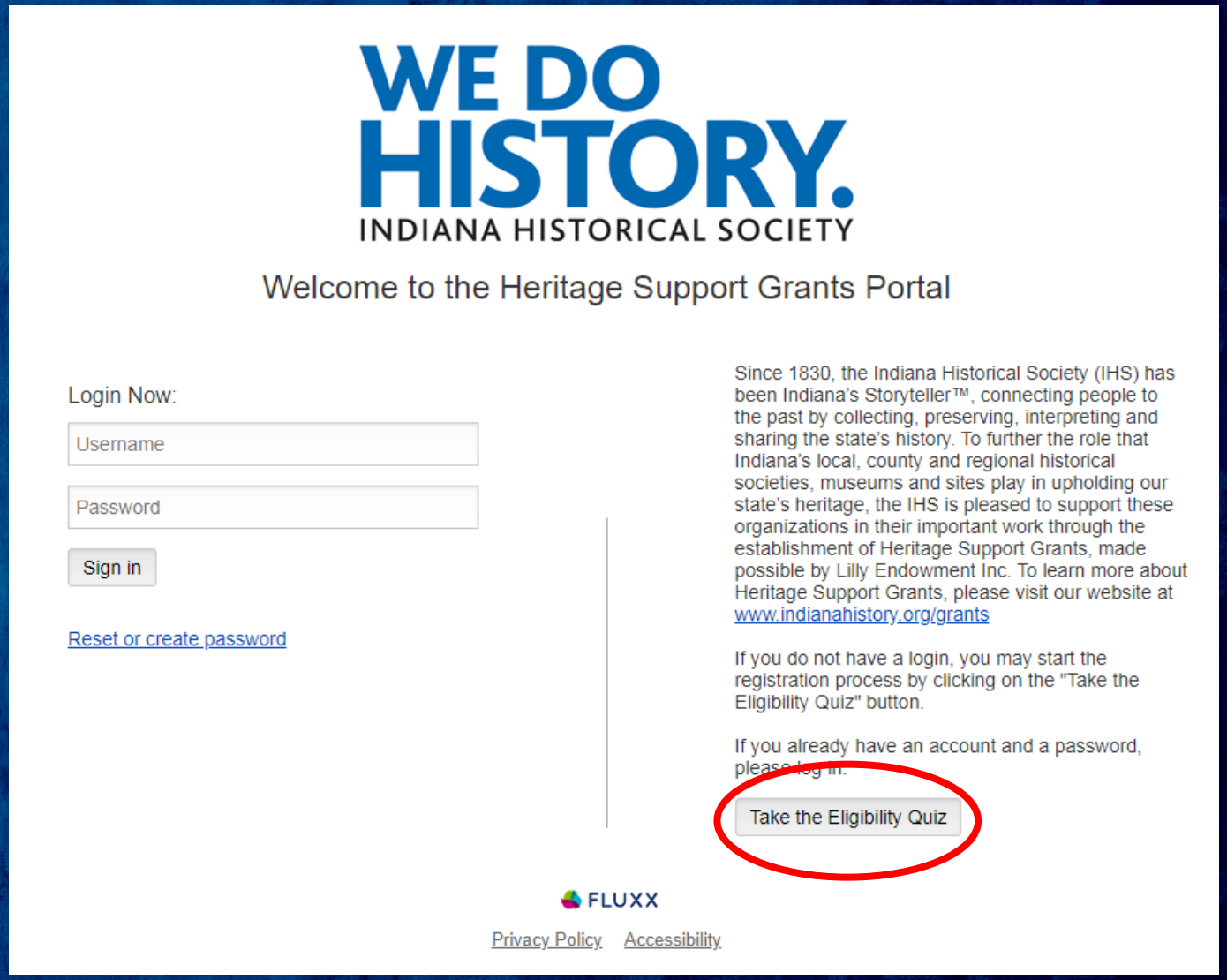

REGISTRATION

- 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

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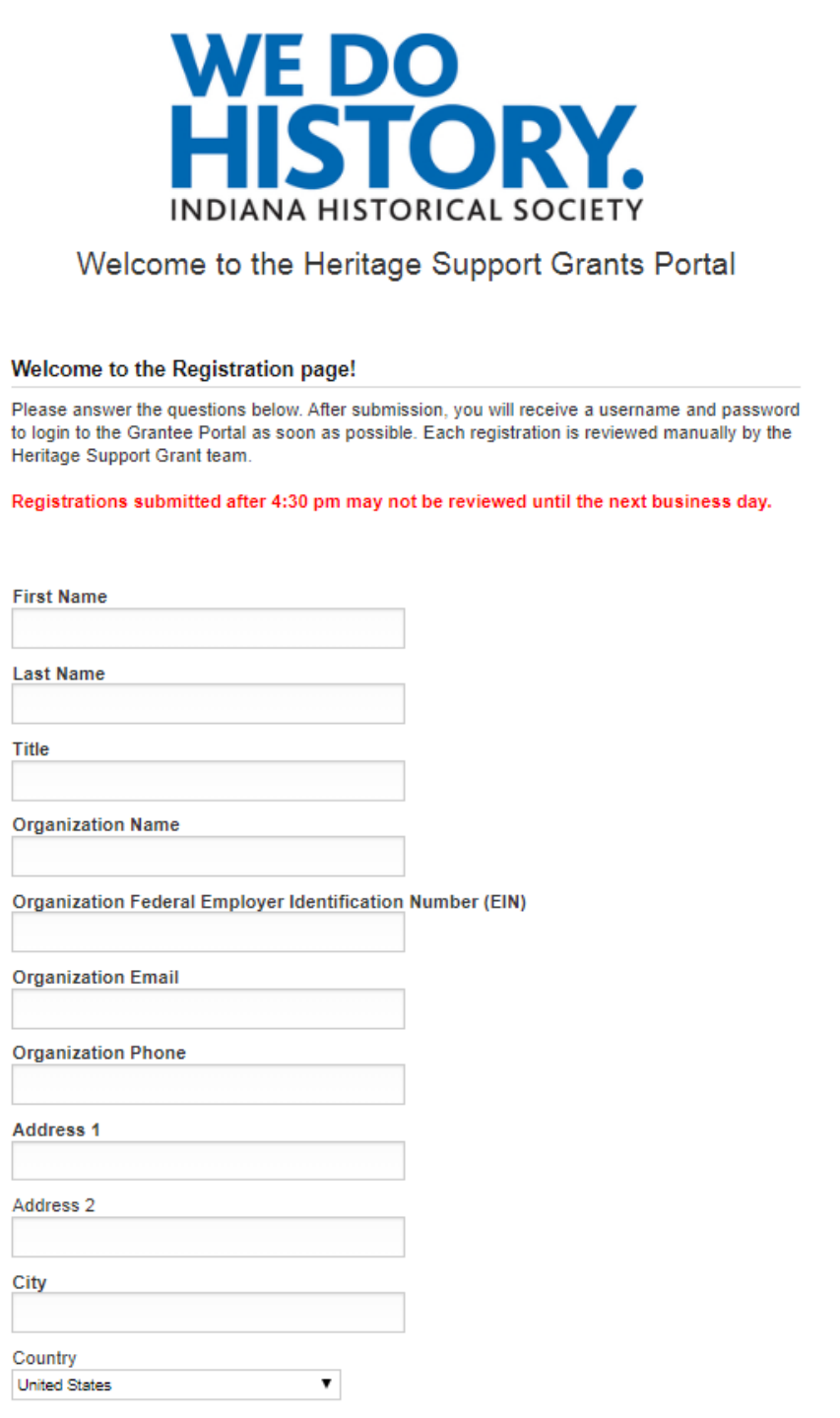

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Welcome to the Heritage Support Grants Portal

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

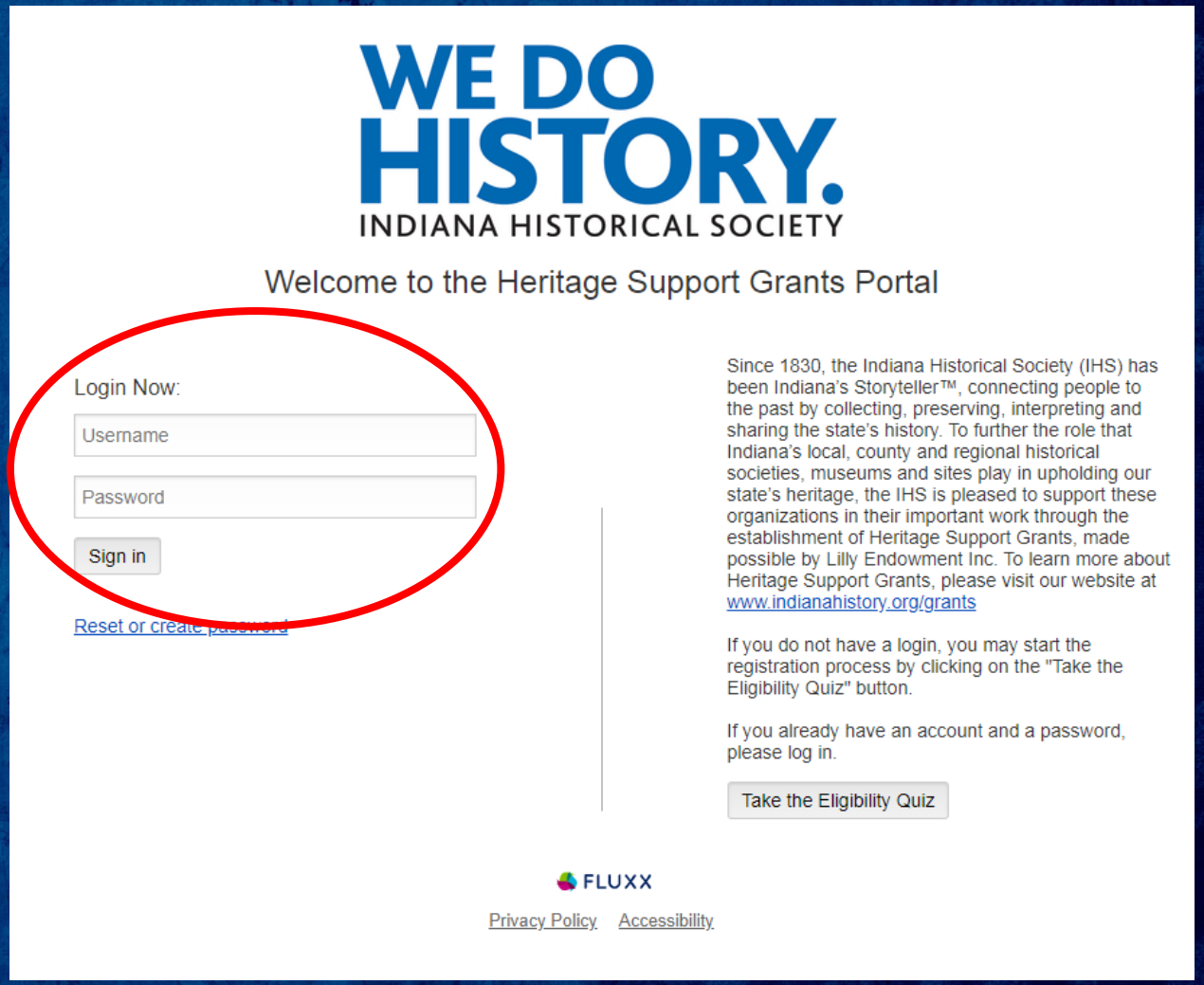
Address 2

City

Country

United States

LOGIN



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GRANT PORTAL

- Start application
- Update information
- Access reports

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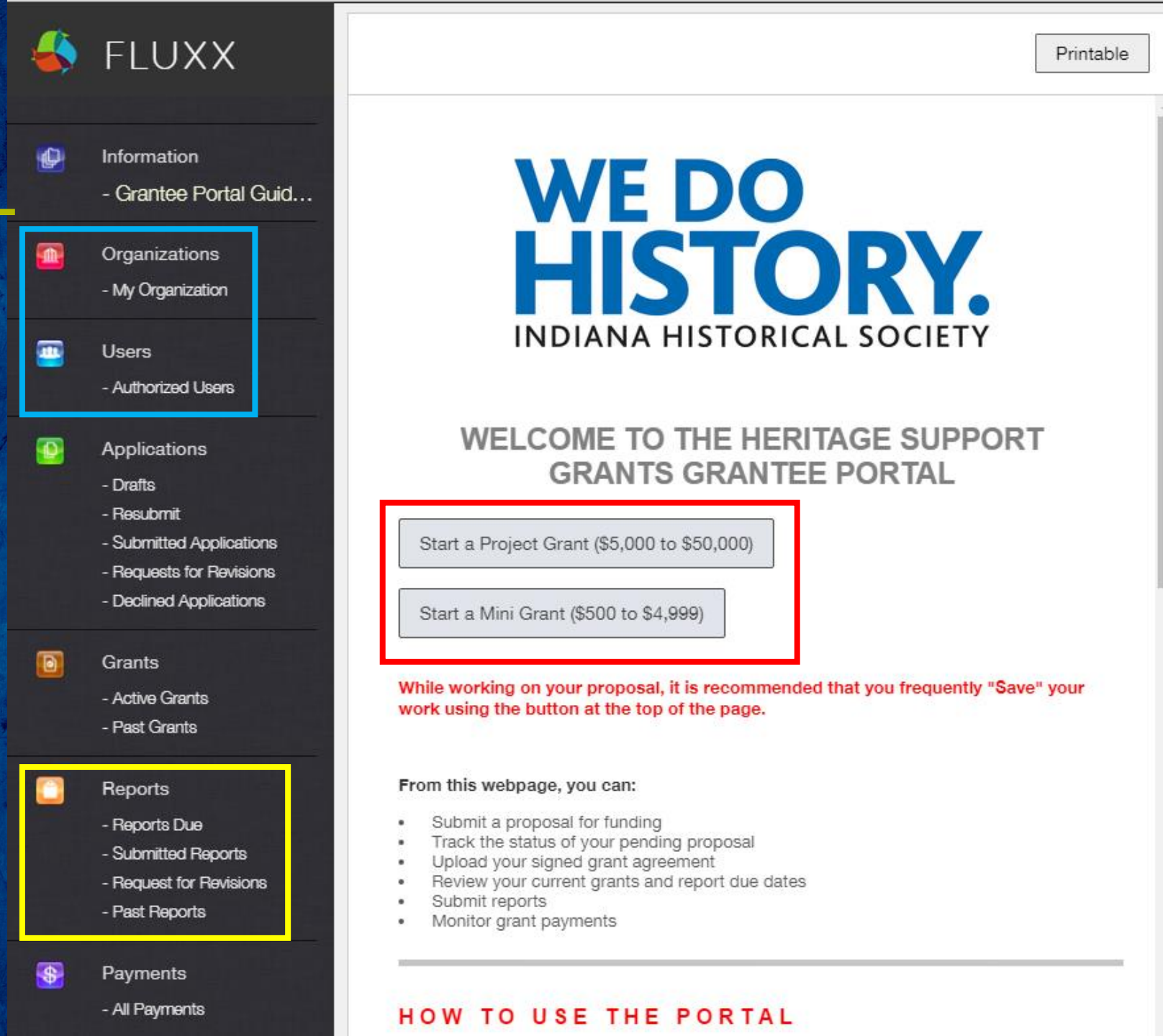

STARTING THE APPLICATION

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

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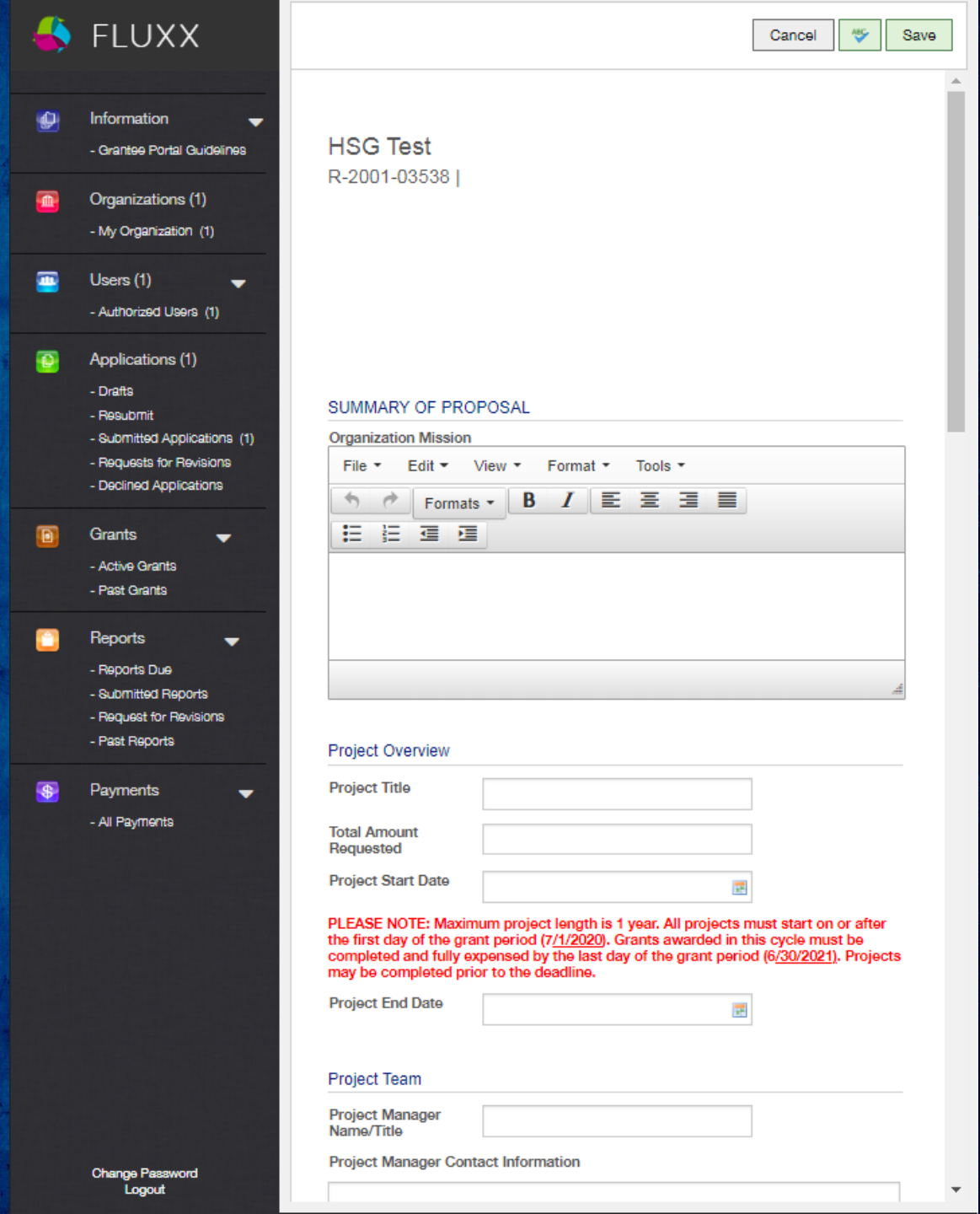
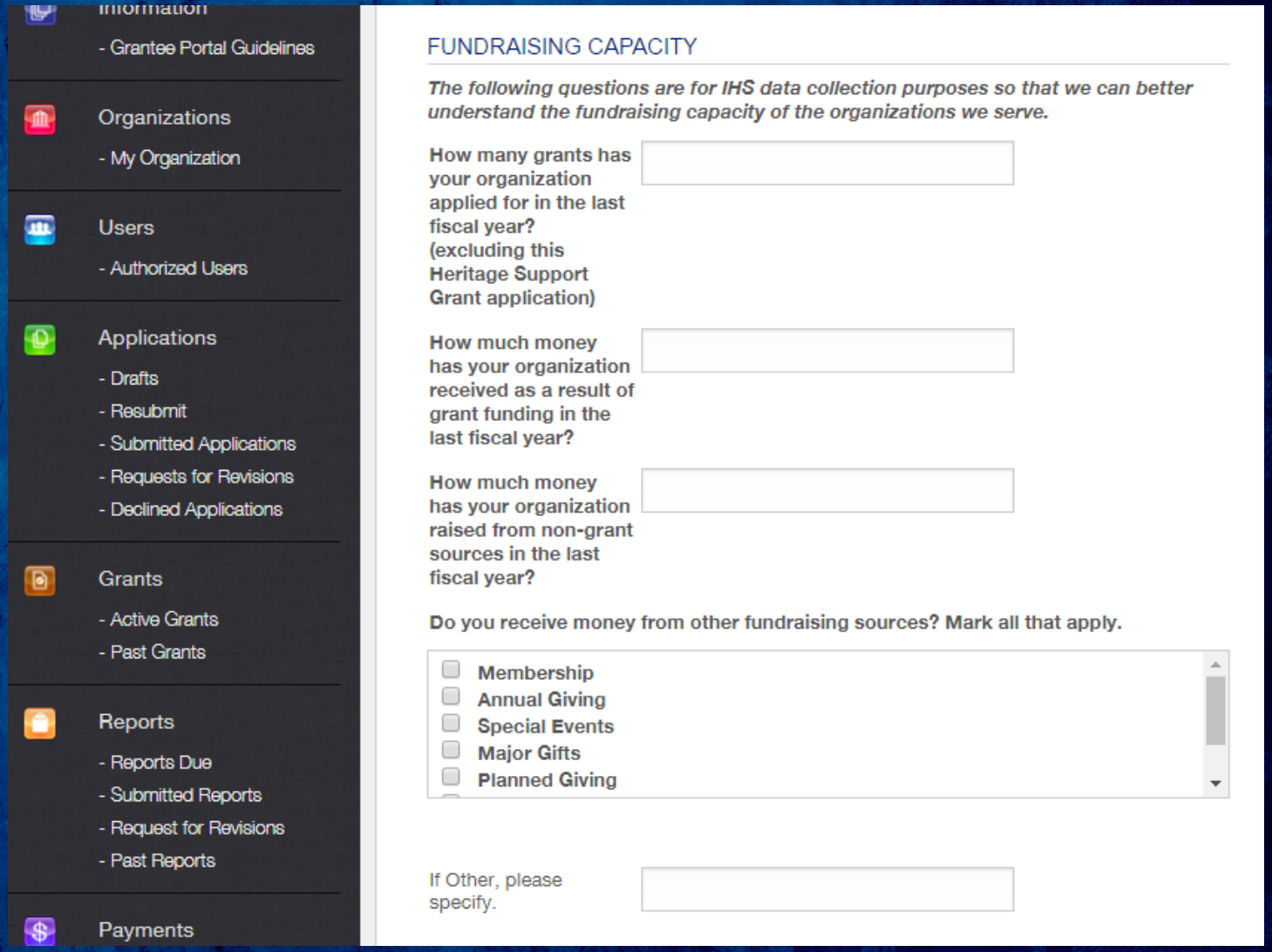


FUNDRAISING QUESTIONS

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



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BUDGET

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

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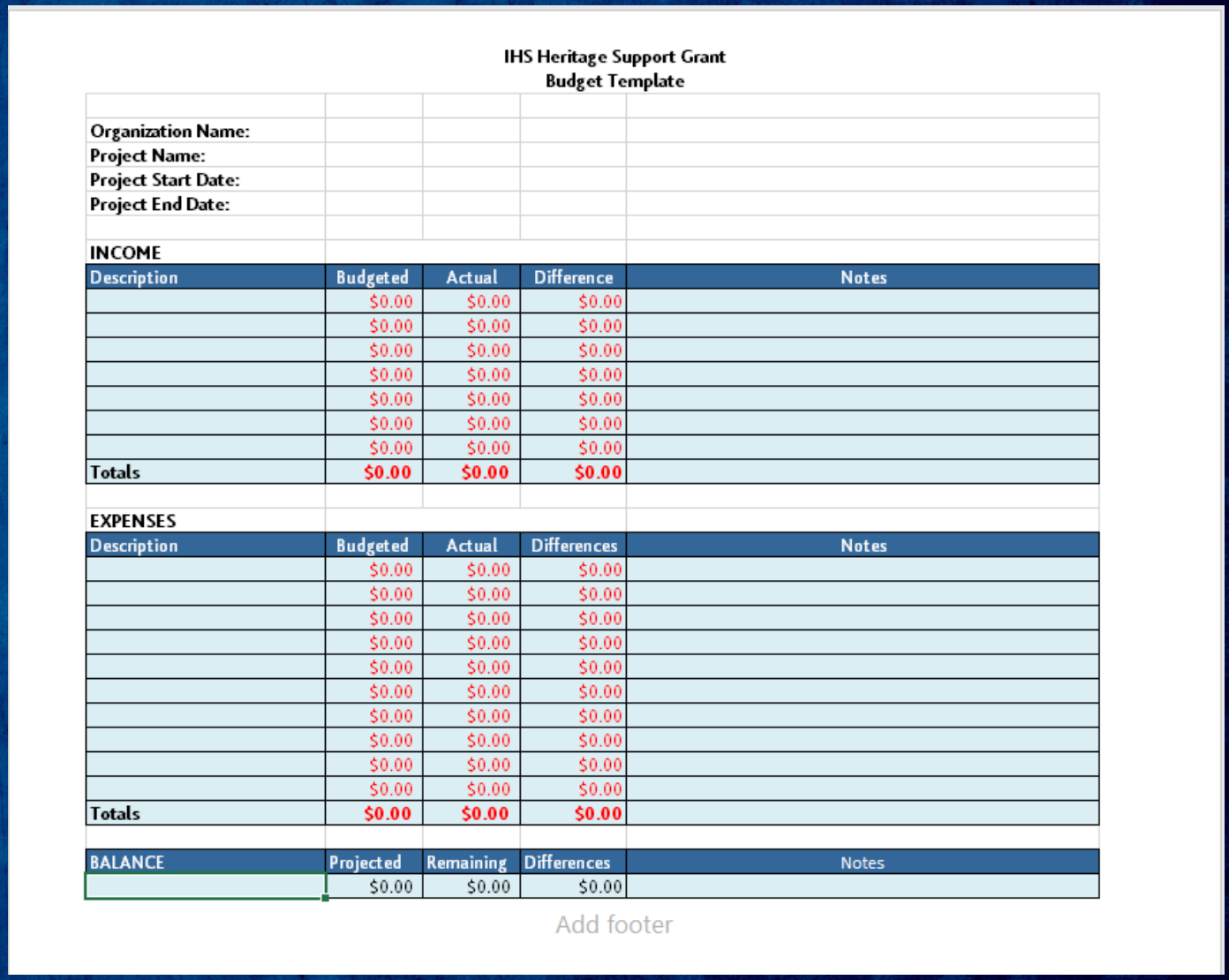


IHS Heritage Support Grant
Budget Template

Organization Name:				
Project Name:				
Project Start Date:				
Project End Date:				

INCOME

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	

EXPENSES

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	

BALANCE	Projected	Remaining	Differences	Notes
	$0.00	$0.00	$0.00	

Add footer

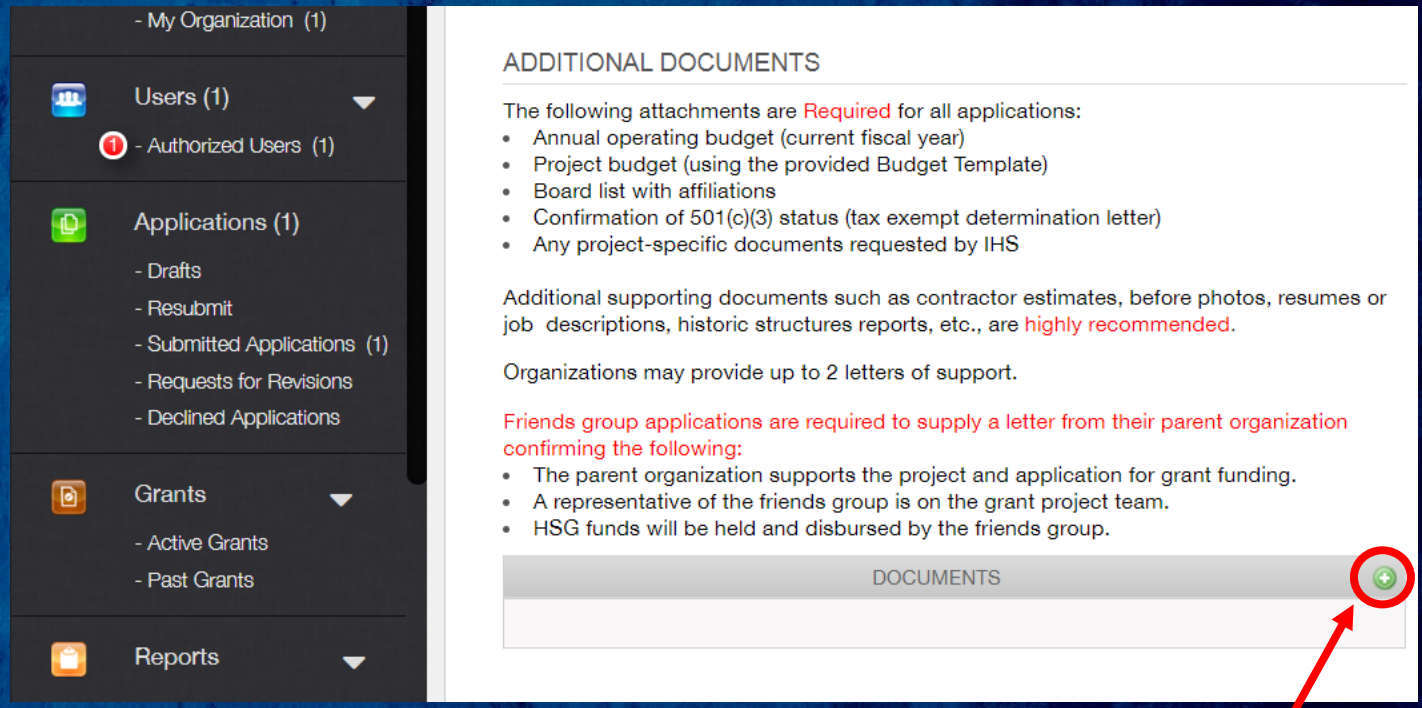
ADDITIONAL DOCUMENTS

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



To add a document, click the green + icon.

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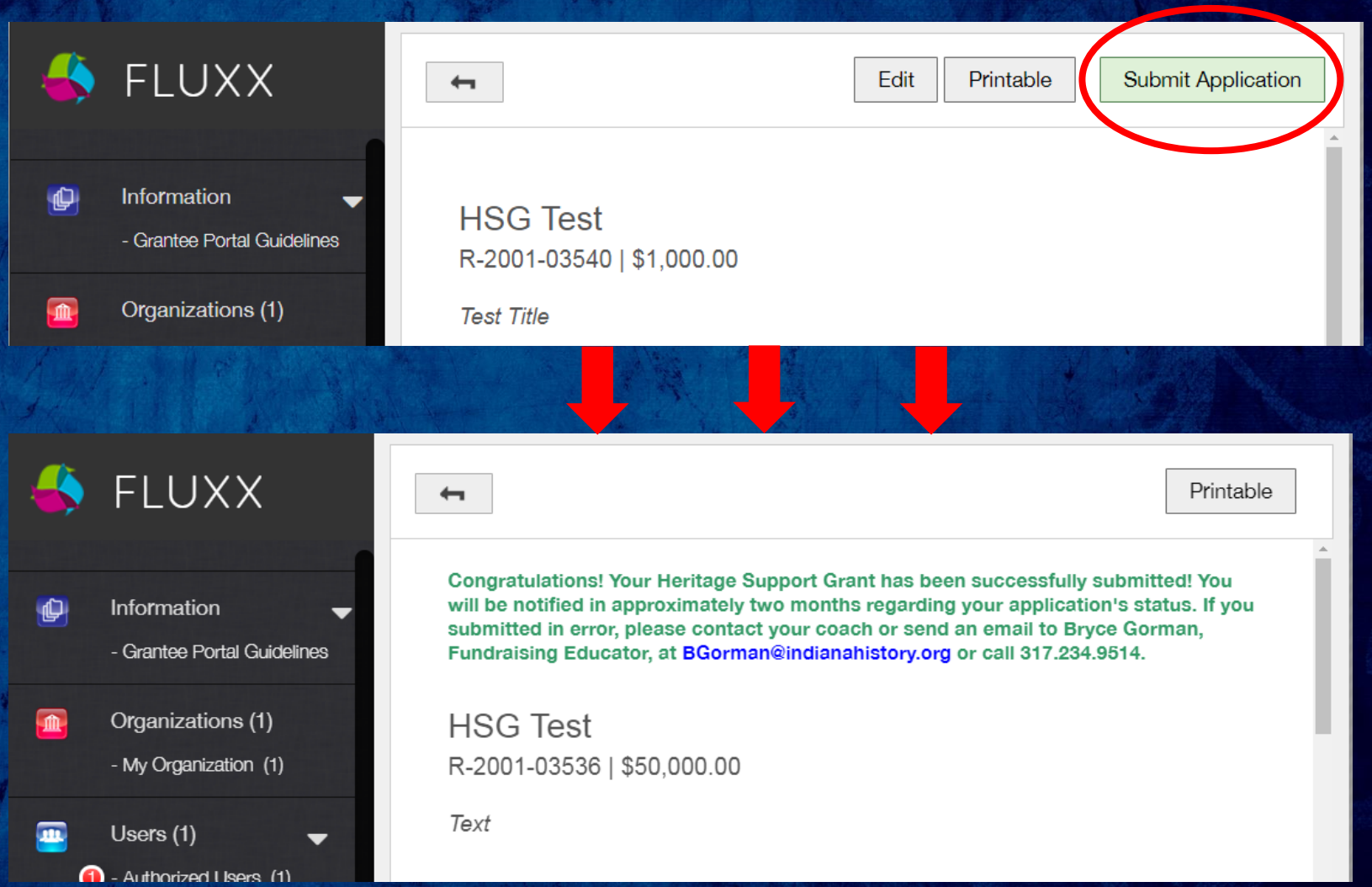
SUBMITTING

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



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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

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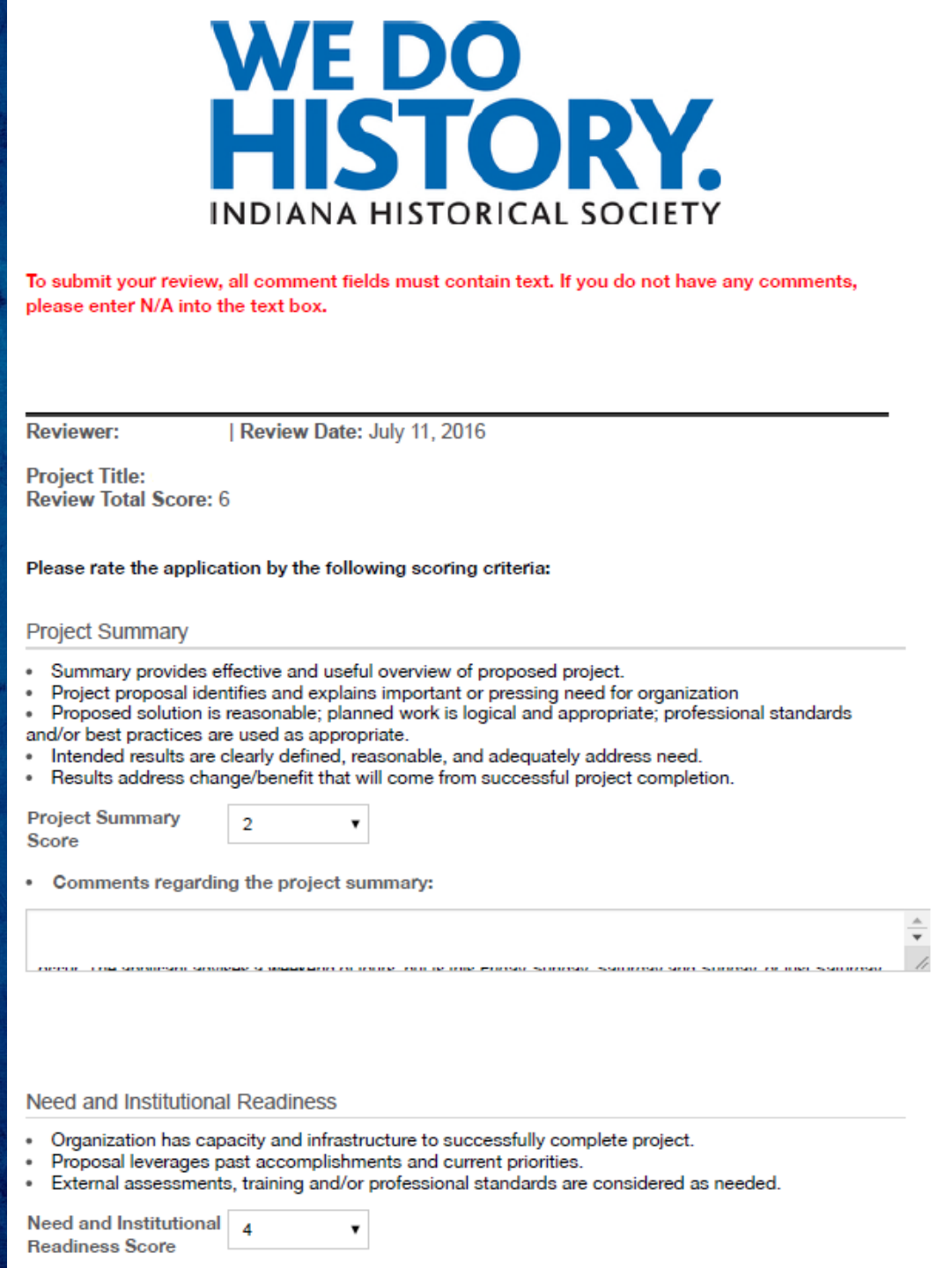

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To submit your review, all comment fields must contain text. If you do not have any comments, please enter N/A into the text box.

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 2

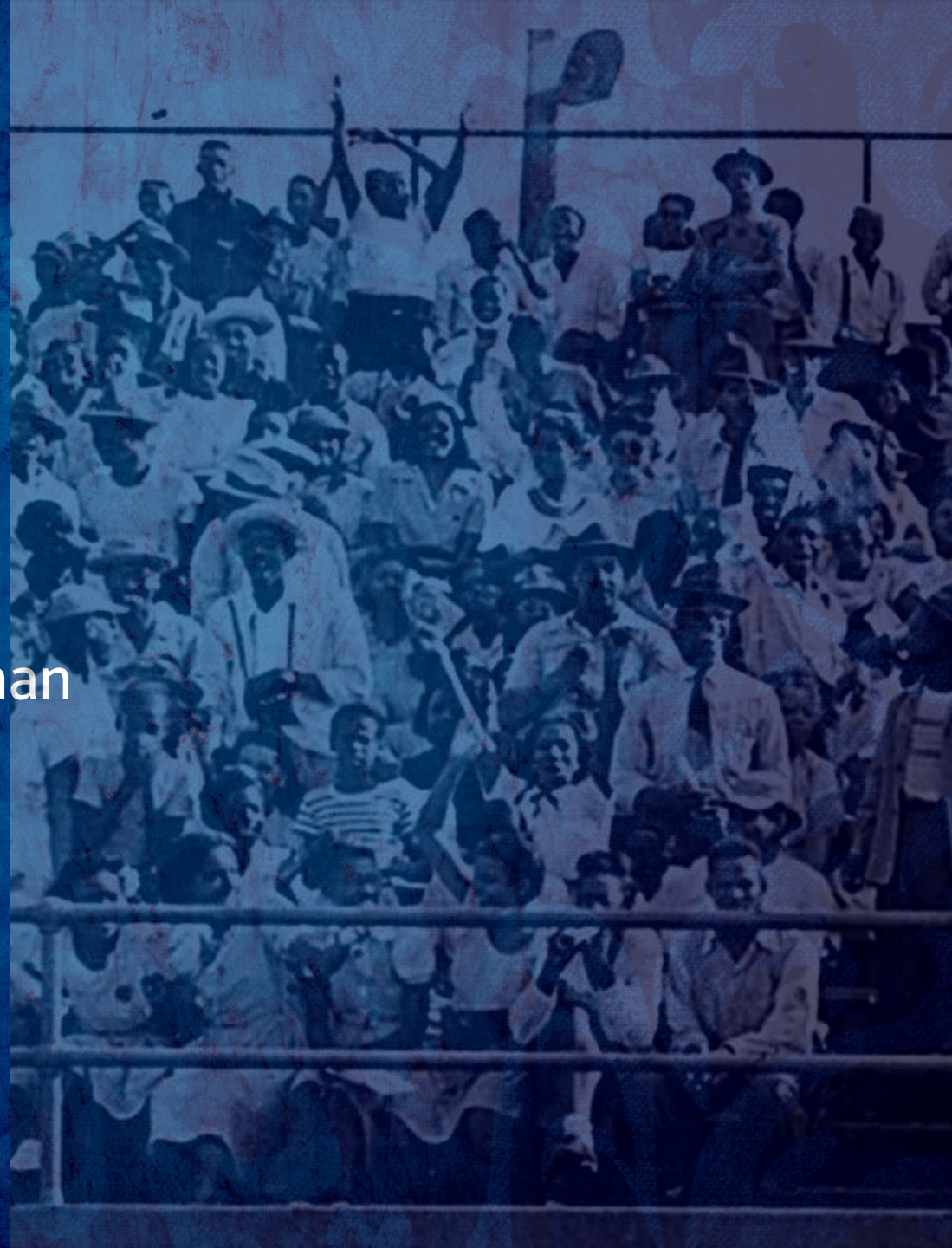
- **Comments regarding the project summary:**

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 4

THANK YOU!

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

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