

Heritage Support Grants Frequently Asked Questions

SECTIONS

- [Grant Types](#)
- [Eligibility](#)
- [Grant Portal](#)
- [Grant Application](#)
- [Budget](#)
- [Coaching](#)
- [Review Process](#)
- [Matching Funds](#)
- [Grantees](#)
- [Resources](#)

GRANT TYPES

What kind of grants does the Indiana Historical Society offer?

IHS offers two types of grants:

- Mini Grants range from \$500 to \$4,999 and the maximum project timeline is 11 months. There is no matching requirement. This is a one-part application process. Awards are made approximately 6 to 8 weeks after the application deadline.
- Project Grants range from \$5,000 to \$50,000. They require a 15% cash match as well as 100% board support. Board support can include financial support or volunteer hours. Project Grants have a 12-month project timeline. There is a two-part process for a Project Grant:
 - First is the Summary of Proposal (SOP), a mandatory part of the Project Grant application process. The SOP is reviewed by an internal committee to ensure the project meets the grant objectives, eligibility and funding priorities.
 - If, after reviewing the Summary of Proposal, the committee feels that a project meets these qualifications, an invitation is sent to submit a Full Proposal.

ELIGIBILITY

What are the eligibility requirements for Heritage Support Grants?

Eligible organizations must:

- Be incorporated in the State of Indiana as a 501(c)3 nonprofit corporation;
- Reflect history as a significant component of their mission and/or propose a project that is clearly history-focused;
- And have an annual budget of less than \$300,000.

Are there special requirements for Friends groups?

In addition to meeting all of the eligibility requirements listed above, Friends groups must, as a part of their Heritage Support Grant application, submit a letter from their parent organization acknowledging that:

- The parent organization supports the project and application;
- A representative of the Friends group will serve on the grant project team (or lead the project);
- And Heritage Support Grant funds will be held and managed by the Friends group.

What will Heritage Support Grants fund?

The Heritage Support Grant program has four funding priorities:

- **Collections stewardship:** Projects address the storage, management, preservation of collections and associated documentation entrusted to the organization's care. This might include historical objects, structures or landscapes as part of collections care.
- **Diversity, Equity, Access and Inclusion (DEAI):** Projects focus on efforts to ensure that diverse individuals fully participate in all aspects of organizational work, broaden organizations beyond public accommodations, and work to achieve genuine inclusion.
- **Sustainability:** These projects focus on identifying and accessing internal and external resources the organization needs to achieve goals for greater capacity and to take important next steps. Sustainability projects meet the needs of the present and help set the organization up for future success.
- **Planning:** Projects which identify organizational objectives and assess organizational capacity.

If I have an open Heritage Support Grant, am I eligible to apply for another grant?

Organizations can only have one open Heritage Support Grant of each type at a time. For example, an organization may have one open Project grant and one open Mini grant. Organizations cannot have two open Project grants or two open Mini grants at once.

ELIGIBILITY, CONT.

Can I use Heritage Support Grant funds to pay for staff?

HSG funds cannot be used to pay for regular staff. They can be used to pay project-related employees, such as independent contractors and/or temporary employees or interns. Please note that independent contractors and temporary employees serve different functions and are classified differently by the IRS. Organizations should always seek the advice of an employment attorney in these matters. Employee classification will affect the project, especially if it proposes funding for personnel. Not only does this classification affect the way your organization must do business (specifically by withholding the proper income tax, social security and Medicare taxes and unemployment tax), but it also affects the bottom line for personnel costs and therefore the grant request total. Please refer to this [IRS article on understanding employee vs. contractor designation](#), and this [IRS article on the Common Law Rule](#).

Can I use a Heritage Support Grant to purchase a collection item?

Yes. However, the application must be able to clearly demonstrate that this collection item is vital to your organization's collection and important to the community, AND that this is the most pressing need of your organization.

Will Heritage Support Grants fund operational expenses?

Heritage Support Grant funding does not cover operational expenses including:

- Rent or mortgage.
- Utilities.
- Insurance
- Retiring organizational debt.

Can I use Heritage Support Grant funds for marketing expenses?

A grant application including marketing would need to demonstrate how the proposed marketing would benefit the project.

GRANT PORTAL

How do I register on the grant portal?

- Returning grant portal users can login to the [Fluxx portal](#) using your existing username and password.
- New applicants should follow the link above and then click on “Take the Eligibility Quiz” at the lower right. If you meet the requirements, you will proceed to registration and will be asked to set up your organization profile. Once you have been verified, your username and password will be emailed to you. Please test your login as soon as possible.

I am having technical issues with the grant portal – who can I contact?

Contact Bryce Gorman at bgorman@indianahistory.org or (317) 234-9514 for help with the grant portal.

GRANT APPLICATION

How do I start an application?

Once an organization takes the Eligibility Quiz, and has received a username and password, they can access the grant portal. After the organization logs into the grant portal, they can choose to start a grant application.

Can I submit my application by mail or email?

No. All applications and accompanying documents must be submitted through the online grant portal.

What is the Summary of Proposal?

The Summary of Proposal serves as the initial inquiry phase of a Project Grant, similar to a Letter of Intent or an Executive Summary. The Summary of Proposal allows organizations the opportunity to provide a brief synopsis of their project's need, solution and expected outcome. It also provides organizational background information and helps the review committee understand whether the organization is ready to take on the project. A Summary of Proposal is required in order to be considered for a Project Grant.

Do Heritage Support Grant proposals require a Letter of Intent?

For the Heritage Support Grant program, the Summary of Proposal is part of the application process and takes the place of a Letter of Intent.

Why are Heritage Support Grant applicants required to watch the Ethics webinar?

501(c)3 nonprofit organizations are legally established for public benefit. For history organizations, this means collections are held in the public trust and must adhere to a field-wide standard of ethics that encompasses accountability, governance and other practices. As such, it is important that we ensure the funds disbursed by Heritage Support Grants, which were entrusted to us by Lilly Endowment Inc., are being used responsibly by organizations who adhere to this standard of ethics.

Do I need to use the logic model in my grant application?

It is not necessary to include the logic model as part of the grant application. It is provided purely as a useful tool to help with outlining the needs, outcomes and impacts of a project. It is a resource to help your organization, not a requirement of the grant application.

GRANT APPLICATION, CONT.

Why does the application ask about our past fundraising?

While review committees may look at this information to determine if your organization has experience managing grants, the primary objective of the fundraising questions is for our own data collection purposes. This information allows us to better understand the extent to which organizations are doing fundraising on their own. Just as the Heritage Support Grant program is providing grants to museums, the Indiana Historical Society is also a recipient of a grant that makes the program possible. In order to discuss the success of the Indiana Historical Society's grant, we must collect data from those applying for the Heritage Support Grant program. We will then use this information to report back to our funder, just as grantees will answer questions to report back to us after the grant period has ended. **NOTE:** Answers to fundraising questions will not prohibit the organization from receiving Heritage Support Grant funding. We only ask that organizations answer these questions to the best of their knowledge.

BUDGET

What documents should I attach to my application?

All grant applications must include:

- The organization's annual budget;
- The project budget on the Heritage Support Grant budget template;
- A list of current board members;
- And a copy of the IRS tax-determination letter. (Please note that the tax determination letter is not a state sales tax exception letter, but the letter an organization receives from the IRS to confirm nonprofit 501(c)3 status.)

Additionally, optional documents can include up to two letters of support, and any additional documents the applicant believes will help strengthen their case. This might include contractor quotes, "before" photos to document the current condition of an item or structure, design plans or drawings or a variety of other materials.

What if I miss the application deadline?

Late grant applications are not accepted. If you miss the deadline, check our website or contact your organization's coach for future grant application deadlines.

COACHING

What is the role of my grant coach?

Grant coaches are here to help organizations navigate the grant application and implementation processes. They can provide further explanation of questions on the Summary of Proposal, application, or reports. Coaches can also read the SOP, Full Proposal or reports before they are submitted and provide feedback.

PLEASE NOTE:

- Coaches will focus on content over writing, meaning they will not proofread a document for misspellings, incorrect grammar or other similar issues. We recommend applicants have another individual read a document for this purpose. The grant coach's primary focus when reading documents is to see them as a reviewer might and offer assistance asking clarifying questions, pointing out places a reviewer might have issues or further questions and to overall help make sure the application is as strong as possible.
- Coaches are unable to predict every question or issue a reviewer might have. Coaches can only rely on their own past experiences with Heritage Support Grant reviewers and other grantors to identify potential places in the application that could come under scrutiny.

Do I have to use my coach?

No, the use of a grant coach is not required. However, those who use their grant coaches often end up with a stronger application which provides an increased potential of being funded. Not using a grant coach does not negatively affect the application.

Does my coach serve on the review panel?

No, grant coaches do not serve as reviewers. Coaches step out of the grant process after applications are submitted and do not step back in until after the reviewers have met and determined who will receive funding. This allows the grant coach to remain impartial and provide a safe space for organizations to ask any question without worrying that it will affect the potential of receiving a grant.

I can't remember who my coach is – how can I find out?

Contact Bryce Gorman at bgorman@indianahistory.org or (317) 234-9514. He keeps an up-to-date list of organizations and their coaches.

THE REVIEW PROCESS

Who is reviewing my application?

Reviewers are history, museum and nonprofit professionals, including representatives from our Local History Partners program. We work to make sure that each review panel includes the perspective of at least one small museum or local history representative. Reviewing grants serves as a fantastic learning opportunity and can help organizations improve their own grant writing skills. Individuals interested in possibly serving as a grant reviewer are welcome to contact a member of the Local History Services department.

How are reviewers evaluating my application?

The [criteria provided to review panels](#) is in-line with the applications. Projects need to fit with HSG funding priorities and present a compelling need for support. Reviewers will:

- Look for evidence of institutional readiness and a well-designed project with a thorough plan for implementation;
- Examine the project budget to see that it is reasonable and complete;
- And will want to know what the intended outcomes are; how they will be tracked and measured, and how they will contribute to the organization's overall stability.

Will I receive feedback on my application?

Reading reviewer feedback is a very important part of the grant process. It can provide guidance on awarded projects as well as improve subsequent grant applications and fundraising asks. Therefore, applicants will receive reviewer feedback whether the project receives funding or not. Organizations are encouraged to contact their coaches with any questions about the feedback.

MATCHING FUNDS

Does the Heritage Support Grant program have a matching requirement?

Project Grants require a 15% cash match of the awarded Heritage Support Grant funds. For example, grant funding of \$20,000 would require a \$3,000 cash match bringing the project total to \$23,000. Fundraising for the match can start up to four months before the Summary of Proposal deadline and must be secured by the end of the grant period. Matching funds must come from new fundraising and cannot come from the organization's general funds, in-kind or cost-share funding.

Grants require 100% board support in the organization. Board support can be financial contributions, volunteer time or a combination of the two. Financial contributions designated for the project can be counted as part of the 15% match.

Grant recipients have a total of 16 months to secure their cash match. Fundraising can start up to four months before the Summary of Proposal deadline and funds must be in hand by the end of the grant cycle.

What qualifies as "Board Support"?

Board support can be financial contributions, volunteer time or a combination of the two. Financial contributions from the board that are designated for the project can be counted as part of the 15% match.

Why does IHS require 100% board support?

During the evaluation of the first Heritage Support Grant phase, it was found that organizations with higher board participation led to long-term growth and success, so it was determined that the requirement of 100% board support would meet the need of higher board participation while offering board members flexibility in whether to invest their time or money.

GRANTEES

Why are we only receiving 90% of our Project Grant?

The Indiana Historical Society determined that disbursing 90% of Project Grant funding with 10% held until the approval of a final report would help ensure prompt response of reporting requirements without hindering the completion of the organization's project.

Why do the project grants require a midpoint report?

The midpoint report is a helpful way for grantees to gauge the progress of their project. The project budget and project timeline will need to be revisited to complete the report and to determine if the project is on track. Reviewing progress at the midpoint gives an organization the opportunity to catch and correct any discrepancies and to contact their coach with concerns or questions.

There has been an issue with our timeline. Can I request a grant extension?

Grant extensions may be requested no later than 3 months prior to the end of the regular grant period. The extension must be requested in writing explaining the reason for the request and how the extension will allow the organization to complete the grant project. Requests for extension will be considered on a case-by-case basis.

Our grant came in under budget. What do we do with the leftover funds?

If the project comes in under the budget that was presented with its application, it may be possible to use the funds for other project-related expenses. Before spending the funds, grantees should contact their coach and discuss how they intend to use the remaining funds.

There has been an unexpected change in our grant project. Can we reallocate funds?

Organizations may reallocate up to 10% of the total grant amount among budget lines. The reallocation will need to be accounted for in the final grant report narrative and budget. If the scope of the project has changed and/or the organization requires a reallocation over 10% of the total grant amount, contact your organization's coach for information on how to proceed with the request. Be sure to contact the coach as soon as it is determined that funds need to be reallocated.

RESOURCES

Does Local History Services offer any resources for new grant writers?

Local History Services has created a [resource page](#) for anyone seeking assistance with grant applications. Resources include grant application samples, the Heritage Support Grant budget template, and glossaries for fundraising and collections care terms.

Local History Services also offers [free fundraising training](#) as it is a vital part of the educational component of the Heritage Support Grant program. Workshops are offered across the state throughout the year. In addition to the workshops, we can also provide individualized training through [site visits](#).