



Sample Final Report & Instructions

Ohio History Fund

For Reference Only

What follows is a sample **History Fund Final Project Report** form and instructions for completing it. We provide these as guides to help you complete your project's final report online.

Mid-Project and Final Project reports are accepted online only through the Ohio History Fund's grant application portal. As with your original grant application, no paper or emailed copies of project reports are accepted.

To find the reports online, go to www.ohiohistory.org/historyfund. Once at the site, click on "**Apply for a grant**," and then click on "**Access the online application**." Log in and look for **Mid-Project, History Fund** or **History Fund Final Project Report** (whichever applies) and click on "**Edit**" to see, complete, and submit the report.

To make completion of the **budget part** of the report go smoothly, have handy a copy of the budget you submitted with your successful grant proposal – or your revised budget if you received a partial grant.

Also refer to the **\$ Budget Form – Final Report Instructions \$**, included in this packet and samples of completed final project budget forms for Bricks & Mortar and Programs & Collections projects found [here](#), under "Grant Reports" on the History Fund's webpage. (The Programs & Collection sample also applies to Organizational Development projects.)

For **narrative part** of the Final Report, have available the following:

- Photographs and images that document the project.
- If a Bricks & Mortar project, the project's completed Maintenance Agreement.
- Materials which prove that you acknowledged History Fund support of your project, such as the required project sign and print notices (in addition to those submitted in your Mid-Project Report).
- ++ Copies of letters to your Ohio House Representative, Ohio Senator, and U.S. Congressional Representative (required if you did not submit with your Mid-Project Report).

Unless you submitted the ++ items in your Mid-Project Report, you are required to upload these items to the final report. See the final report and your grant agreement for details.

NOTE: Remember to copy and paste multiple items into a single document and upload that one document. The report software will not permit you to upload more than one item in an upload space (Item 3 will kick Item 2 out of the upload space, just as Item 2 kicked out Item 1).

The deadline for submission of the final project report is noted in your grant agreement, under "Reports, Forms, & Disbursement of Grant Funds."

The History Fund must accept and approve your final report before it can disburse the remaining balance of the grant. During our review, we may require clarifications of items in the report. Please address inquiries promptly, as it speeds our review, the final disbursement of the grant, and the closing of the History Fund's project file.

Thank you for taking the time to complete this report. Once we make the final disbursement of the grant, you are welcome to apply from another History Fund.

Questions? We are happy to help! Contact:

Andy Verhoff
Ohio History Fund & Outreach Manager
State Historic Preservation Office / Ohio History Connection
800 East 17th Ave., Columbus, OH 43211
614-562-4490 (cell); 614-297-2341 (office); averhoff@ohiohistory.org

History Fund 2021-2022 (FY22)

Ohio History Connection

Project Name & Category

Project Name*

Character Limit: 100

Funding Category*

Select the type of category which best describes your project. Click [here](#) to see descriptions of funding categories in the History Fund Grant Guidelines

Choices

Organizational Development

Programs & Collections

Bricks & Mortar

The Purpose of Your Final Report

Congratulations on the completion of your Ohio History Fund-supported project. The purpose of this final report is to document your project and the use of grant funds and match.

Upon acceptance of this report, the Ohio History Connection will forward to you an invoice for the remainder of your grant award, which you will sign and return to the Ohio History Connection. Upon receipt of the invoice, the Ohio History Connection will issue a check to you for the remainder of your grant. (This is the same procedure you completed to receive your initial grant payment.)

The deadline for submission of your final report is noted in your grant agreement and is no later than 30 days after the end of grant project period.

The Ohio History Connection will use the information in this and the Mid-Project Report to chronicle the progress of the History Fund program and the use of tax check-off donations. The History Fund is supported entirely by donations Ohioans make through their state income tax returns, by purchasing Ohio History "mastodon" license plates, and through designated gifts to the Ohio History Connection. The state's General Assembly and governor enabled a tax check off for the Ohio History Fund in 2011.

The information provided in your report also helps the Ohio History Connection make the case for the History Fund, which is imperative. The Ohio History Connection must raise a minimum of \$50,000 through the tax check-off, or it will be removed from the state income tax return

form and threaten the continuation of the History Fund grant program. The more the History Fund receives in donations, the more it makes in grants.

Your grant report can help sustain the History Fund. You have the power to help other organizations benefit as you have (and can again). We appreciate the time you will take to complete the report. As always, if you have questions, please contact us:

Ohio History Fund
State Historic Preservation Office
Ohio History Connection
averhoff@ohiohistory.org
614-562-4490 (cell); 614-297-2341 (office)
www.ohiohistory.org/historyfund

Date of Report*

Character Limit: 10

Budget Summary

Budget Final Report Form*

Click here to download the "History Fund Budget Final Report Spreadsheet." *Use of this form is required.* The form is available for download is a Microsoft Excel spreadsheet. If you do not have access to Excel or cannot download the Budget Form spreadsheet, contact the History Fund.

[Click here](#) for instructions on how to complete the History Fund Budget Final Report Spreadsheet.

PROGRAMS & COLLECTIONS and ORGANIZATIONAL DEVELOPMENT, example of **completed Final Project Report Budget Form**

<https://www.ohiohistory.org/OHC/media/OHC-Media/Documents/History%20Fund/SAMPLE-HF-BRICKS-MORTAR-Budget-Form-Final-Report-BRICKS-PTHS.xlsx>

BRICKS & MORTAR, example of **completed Final Project Report Budget Form**

File Size Limit: 1 MB

Project Summary

Because the History Fund supports a wide range of projects, the questions allow for a variety of answers based on the type of project you completed. Please make your answers as specific as possible; address the "whos," "whats," "whens," "whys," and "hows" of your project.

#1*

What did your project accomplish?

Character Limit: 1500

#2*

Who benefited from your project? Who will continue to benefit from the project now that it is concluded? Make sure your answer also indicates how many people were affected by the project. Note: "Who" may include audiences for public programs or exhibits, contractors and workers on Bricks & Mortar projects, users of digitized materials, interns who worked on collections care projects, etc.

Character Limit: 1500

#3*

What parts of your project went really well? What parts of the project would you do differently? How would you have done them differently? Note: please explain any budget variances of greater than 20% in this section.

Character Limit: 1500

#4*

If the grant project was part of a larger initiative, did the project enable your organization to take next steps to achieve that greater goal? Why or why not? (Include a brief description of the "larger initiative" or "greater goal" in your answer.)

Character Limit: 1500

#5*

To help the History Fund highlight your project, **please include any significant quotes or descriptions of memorable moments.** Also feel free to share noteworthy revelations or insights garnered from the project. *Note:* There is a place in the section "Project Photographs, Images, and Products" below to upload project photographs.

Character Limit: 1500

#6 Copies of Contracts

If work on your grant project was governed by contracts entered into by your organization, upload a copy of each contract here.

Note: If necessary, cut and paste multiple contracts into one document and then upload that document here (rather than attempting to upload each contract separately. The software is not configured to upload separate documents, just one.)

File Size Limit: 5 MB

Project Photographs, Images, and Products

Before, during, and after photos of projects are worth a thousand words. Upload photos and images of your project. Note: photos are required for Bricks & Mortar projects.

Images can include photographs, maps, or charts. Provide a "photo key" that describes the images. Include in the key:

- 1) Grant project title
- 2) Applicant organization
- 3) Date of photo, and
- 4) Description of each view or image (sample descriptions for Bricks & Mortar projects: "west elevation," "second floor hallway looking north," etc.)

The total size of uploads cannot exceed 10 MB.

Note: Cut and paste all your photos and the photo key into one document and then upload that document here (rather than attempting to upload each photo and the photo key separately. The software is not configured to upload separate documents, just one.)

Shoot and save your photos at high resolution (300 ppi). Upload low resolution (72 ppi) versions of the photos to the report.

Under separate cover, send a disk of the high resolution images to the History Fund at the address above. Identify the disk with the name of your organization and grant project name.

If your project is a documentary, publication, or otherwise would be best submitted using surface mail, send two copies under separate cover to the History Fund at the address above.

The Ohio Historical Society reserves the right to use all submitted images in its reports and publications and will provide photo credit to the submitting organization.

Photo / Image Upload*

File Size Limit: 10 MB

Bricks & Mortar Grants Only: Preservation Agreement

As per your Grant Agreement: Prior to final payment of the grant award, an agreement must be executed between the Ohio History Connection and the Owner of the property on which History Fund funds have been expended, according to which the Owner agrees to assume the cost of continued maintenance and repair of said property so as to preserve the architectural, historical, or archaeological qualities that keep the property eligible for listing on the National Register of Historic Places, or, for non-historic structures, that retains the building for its intended use. The term of the agreement shall be for not less than 5 years.

[Click here](#) for a template for a preservation agreement. Other than the insertion of information required by the form, no alterations to the terms of the agreement are permitted.

Preservation Agreement

Upload a draft of your proposed maintenance agreement. It will be reviewed by the History Fund and, once approved, signed by the grantee and a representative from the Ohio Historical Society

File Size Limit: 1 MB

Acknowledging History Fund Support

Upload Promotional Materials*

Upload materials created since the Mid-Project Report to promote your project. Denote acknowledgements of History Fund and Ohio History Connection support. These materials can include news releases, newsletter articles, web sites, social media postings (e.g. Facebook), and program handouts.

Note: As in the section above, cut and paste acknowledgements into one document and then upload that document here (rather than attempting to upload each item separately. The software is not configured to upload separate documents, just one.)

File Size Limit: 5 MB

Letters to Elected Officials

Upload Letters to Elected Leaders

If not submitted with your Mid-Project Report, upload letters to elected leaders as described in your grant agreement.

Note: Cut and paste letters into one document and then upload that document here

File Size Limit: 1 MB

Final Report Checklist

If you can check off these items, your Final Report is ready to be submitted. Congratulations and thank you!

Choices

Budget Final Report Spreadsheet complete and correct?

Budget Final Spreadsheet uploaded?

Project Summary completed?

Contracts uploaded (if applicable)?
Preservation Agreement uploaded (if Bricks & Mortar grant)? Project Photographs uploaded?
High resolution images or 2 hard copies of products sent to History Fund?
Promotional Materials uploaded?
Letters to Elected Officials uploaded (if not submitted with Mid-Project report)?
Confirmation indicated? Project Director contact information given? - see "Confirmation" below

Confirmation

Confirmation*

By clicking the button below, the Project Director for the grant project confirms that work under this grant has been performed in accordance to the terms and conditions outlined in the grant agreement, including amendments, and that the final grant report is an accurate description of the project's activities and expenditures to the best of project director's knowledge and documentation.

Choices

I hereby confirm the truth of the statement above.

Project Director Name & Daytime Phone Number*

Please enter the name and daytime phone number (M - F) of the Project Director. If we have questions about the report, this is who we will call.

Character Limit: 300

PRESERVATION AGREEMENT

History Fund

Bricks & Mortar Grant

This agreement is made on the _____ day of _____, 20XX, between the Ohio Historical Society dba the Ohio History Connection at 800 East 17th Avenue, Columbus, Ohio 43211, herein referred to as the "Society," and _____, recipient of a History Fund Bricks & Mortar grant and Owner, in fee simple, of said Property, herein referred to as the "Grantee." The purpose of this maintenance agreement is the preservation of the Property known as _____, located at (legal address, city, county), Ohio, which is listed on the National Register of Historic Places.

The Property is comprised essentially of grounds, collateral, appurtenances, and improvements and is known as _____. The Property is more particularly described in Attachment A, to be added by Grantee. [Include county reference, consisting of repository, book, and page number(s).]

In consideration of the cumulative sum of \$_____ received as a grant from the Ohio History Fund of the Society, the Grantee hereby agrees to the following for a period of five (5) years from the date above:

1. The Grantee agrees to assume the cost of continued maintenance and repair of said Property so as to preserve the architectural, historical, or archaeological integrity of the same in order to protect and enhance those qualities that made the Property eligible for listing in the National Register of Historic Places.
2. The Grantee agrees that no visual or structural alteration will be made to the Property without prior written permission from the Society.
3. The Grantee agrees that the Society, its agents, and designees shall have the right to inspect the property at all reasonable times in order to ascertain whether or not the conditions of this agreement are being observed.
4. The Grantee agrees that no person shall be excluded from participation in, denied the benefits of, or otherwise be subjected to discrimination under any program, activity, or service on the basis of race, color, religion, sex, national origin, disability, ancestry, or age.
5. This preservation agreement shall be enforceable in specific performance by a court of competent jurisdiction.
6. It is understood and agreed by the parties hereto that if any part, term, or provision of this agreement is held to be illegal by the courts, the validity of the remaining portions or provisions shall not be affected, and the rights and obligations of the parties shall be construed and enforced as if the contract did not contain the particular part, term, or provision held to be invalid.

Preservation Agreement entered into by:

Ohio Historical Society

date

Grantee/Owner

date

State of Ohio)

ss: County of _____)

On this ____ day of _____, 20XX, before me, a notary public in and for said County, personally appeared _____, the Grantee in the foregoing Historic Preservation Maintenance Agreement, and acknowledged the signing thereof to be a voluntary act and deed.

In Witness Whereof, I have hereunto subscribed my name and affixed my official seal on the day and year last above written.

Notary Public

This instrument prepared by: Ohio History Connection



\$ Budget Spreadsheet Instructions-Final Report \$

Ohio History Fund

The Budget Final Report Form enables you to document the use of your grant to accomplish your project. The form also allows for comparisons between the actual use of the grant and the budget submitted with your original application. Match requirements must be met. They are described below under "Totals" and "% of Total Project Cost"

Acceptance of the final budget report and final grant report narrative by the History Fund is required before the remaining amount of the grant can be disbursed. As reports are reviewed, the History Fund may have questions about specific expenses. It is a good idea to keep handy all project invoices, proofs of payment, and documentation of match, etc. According to your grant agreement, you are required to keep all grant paperwork for a minimum of three years after the conclusion of the project. See the agreement section "Grant Accounting and Auditing" for other requirements.

Your attention to this report will help us document the judicious use of the History Fund to support local history projects in Ohio, as well as develop data regarding the costs of preserving and sharing our state's heritage.

The form consists of three worksheets:

1. **ITEMIZED REPORT OF ACTUAL GRANT EXPENSES**
2. **ITEMIZED REPORT OF ACTUAL CONSTRUCTION EXPENSES** (the report of construction expenses is required for Bricks & Mortar projects only)
3. **SUMMARY OF GRANT EXPENSES, ACTUAL V. BUDGET**

Navigate among the worksheets by clicking on the colored tabs below the worksheets.

Note: for **Programs & Collections** and **Organizational Development** projects, two forms are required: 1) Itemized Report of Actual Grant Expenses and 2) Summary of Grant Expense, Actual v. Budget.

For **Bricks & Mortar** projects, *three forms* are required: 1) Itemized Report of Actual Grant Expenses, 2) Itemized Report of Actual Construction Expenses, and 3) Summary of Grant Expense, Actual v. Budget

1. **ITEMIZED REPORT OF ACTUAL GRANT EXPENSES form**
2. **ITEMIZED REPORT OF ACTUAL CONSTRUCTION EXPENSES form** (the report of construction expenses is required for bricks & Mortar projects only)

The **Itemized Report of Actual Grant Expenses** and **Itemized Report of Actual Construction Expenses** ask you document how you allocated grant money and matching support. Instructions for completing both reports are the same.

Explanations of the column headings of these worksheets are as follows:

- **“Budget Category”** – the type of expense. You do not have to enter any information into this column.
- **“Person / Organization Providing Goods / Services”** – *Who* did you pay grant funds to for goods/services received? From whom did you receive matching support?
- **“Brief Description of Goods/Services Received”** -- *What* did you receive?
 - For ease of use and consistency, feel free to copy “Budget Items” from the budget you submitted in your grant application into either of these columns above, as appropriate.
- **“History Fund Grant Spent”** and/or **“Match Expended (Cash Value)”** - *How much* did you pay or what was the cash value of the matching contribution? As in the budget submitted in your organization’s grant application, expenses may be ascribed to the grant or to the match or to both, as shown in the sample budget report.
- **“Source of Match”** – The origin or source of funding or support for the contribution. For example, was the source of match general operating funds, other grants, donations of goods, volunteer labor, or services, etc.?
 - In addition to telling the us who (or what organization) gave your project matching support (under “Person / Organization Providing Good / Services”) telling us the source of the match helps us to quantify what kinds of matches support History Fund projects.
- **“Total Spent/Expended (G. funds + match)”** – the sum of the columns “History Fund Grant Spent” and/or “Match Expended (Cash Value).” The totals in this column are calculated automatically. The sum total is rounded up to the nearest dollar. (**Note:** “G. funds” is an abbreviation of Grant funds)

3. SUMMARY OF GRANT EXPENSE, ACTUAL V. BUDGET form

The Summary enables comparisons between the budget submitted with your original grant application (or revised version submitted to the History Fund) and your final, actual grant expenses.

You will need to have handy the budget from your original grant application to complete this form. As in the budget submitted in your original grant application, expenses may be ascribed to the grant or match or to both.

Make sure to complete the very top of the form, which asks for Grant Project Title and Applicant Organization

Note: these spreadsheets are designed print on legal-size paper (8.5 x 14 inches) in landscape orientation.

****** Headings with ****** indicate that columns and rows that automatically fill in with information you have already entered – no extra data entry required.

Explanations of the column headings are as follows:

“Expenses Paid from Grant Funds”

- **“Budget Category”** – the type of expense. You do not have to enter any information into this column.
- **“Budgeted Grant Funds (from Grant Application budget or subsequent revised budget)”** – Enter the subtotal amount for each category from the budget of your original grant application. (Category = “Materials & Supplies,” “Equipment,” etc.)
- **** “History Fund Grant Spent (from Itemized Report of Actual Expenses / Construction Expenses)”** – The subtotal amounts from the Itemized Report of Actual Expenses (and Itemized Report of Actual Construction Expenses, if applicable) will automatically fill these columns.

“Expenses Covered by Match”

- **“Budgeted Match (from Grant Application budget or subsequent revised budget)”** – Enter the subtotal amount for each category from the budget of your original grant application. (Category = “Materials & Supplies,” “Equipment,” etc.)
- **** “Actual Match (from Itemized Report of Actual Expenses / Construction Expenses)”** – The subtotal amounts from the Itemized Report of Actual Expenses (and Itemized Report of Actual Construction Expenses, if applicable) will automatically fill these columns.

“Total Budgeted v. Actual Expenses”

- **** “Budgeted Total (G. Funds + Match)”** – the sums of the columns “Budgeted Grant Funds” and “Budgeted Match.” (**Note:** “G. funds” is an abbreviation of Grant funds)

- **** “Actual Total (G. Funds + Match)”** – the sums of the columns “History Fund Grant Spent” and “Actual Match.”
- **** “Amount of Variance (G. Funds + Match)”** – Entries in this column will populate automatically and display the difference, if any, between the “Budgeted Total” and the “Actual Total.” A minus sign (-) in the column indicates that you spent less than the budgeted amount.
 - *Note:* Final disbursements of grant funds will be reduced by any unspent amount. For example: if the remaining amount due your organization is \$3,300, but your final budget report shows that you spent \$3,250, your final grant payment will be reduced by \$50. The remainder will stay in the History Fund for future grants.
- **** % of Variance** – Entries in these columns will populate automatically and represent the Amount of Variance as a percentage of the Budgeted Total.
 - *Note:* If variance is greater than 20% (plus or minus), indicate the reason on the History Fund Final Project Report Form under section “Project Summary,” question #3.

**** “Totals” and “% of Total Project Cost”**

These rows are found at the bottom of the worksheet. **“Totals”** calculates the sum of each column. **“% of Total Project Cost”** is proof that your project has met the History Fund’s match requirements, as follows:

- Bricks & Mortar and Programs & Collection grants: match must equal or exceed **40%** of the total project cost.
- Organization Development grant: match must equal or exceed **20%** of the total project cost.
- *Note:* The “% of Total Project Cost” is calculated automatically after amounts appear in the “Totals” line (which is also calculated automatically).

Have Questions? Need Help?

Contact:

Andy Verhoff
Ohio History Fund & Outreach Manager
State Historic Preservation Office / Ohio History Connection
800 East 17th Ave., Columbus, OH 43211
614-562-4490 (cell); 614-297-2341 (office); averhoff@ohiohistory.org

Construction Budget Form Final Report - History Fund

For Bricks & Mortar Projects only

Itemized Report of Actual Construction Expenses

Budget Category	Person/Organization Providing Goods/Services	Brief Description of Goods/Services Received	History Fund Grant Spent	Match Expended (Cash Value)	Source* of Match	Total Spent/Expended (G. funds + match)
General Conditions						\$0.00
						\$0.00
						\$0.00
						\$0.00
Subtotal			\$0.00	\$0.00		\$0.00
Site Work						\$0.00
						\$0.00
						\$0.00
						\$0.00
						\$0.00
Subtotal			\$0.00	\$0.00		\$0.00
Concrete						\$0.00
						\$0.00
						\$0.00
						\$0.00
						\$0.00
Subtotal			\$0.00	\$0.00		\$0.00
Masonry						\$0.00
						\$0.00
						\$0.00
						\$0.00
						\$0.00
Subtotal			\$0.00	\$0.00		\$0.00
Metals						\$0.00
						\$0.00
						\$0.00
						\$0.00
						\$0.00
Subtotal			\$0.00	\$0.00		\$0.00
Wood & Plastics						\$0.00
						\$0.00
						\$0.00
						\$0.00
						\$0.00
Subtotal			\$0.00	\$0.00		\$0.00
Thermal/Moisture						\$0.00
						\$0.00
						\$0.00
						\$0.00
						\$0.00
Subtotal			\$0.00	\$0.00		\$0.00
Doors & Windows						\$0.00
						\$0.00
						\$0.00
Subtotal			\$0.00	\$0.00		\$0.00

[illegible]

Budget Final Report Form-History Fund									
Grant Project Title:									
Applicant Organization:									
Expenses Paid from Grant Funds				Expenses Covered by Match			Total Budgeted v. Actual Expenses		
Budget Category	Budgeted Grant Funds (from Grant Application or subsequent revised budget)	History Fund Grant Spent (from Itemized Report Actual Expenses)	Budgeted Match (from Grant Application or revised budget)	Actual Match (from Itemized Report Actual Expenses)	Budgeted Total Project Cost (G. Funds + Match)	Actual Total Project Cost (G. Funds + Match)	Amount of Variance (G. Funds + Match)	% of Variance (G. Funds + Match)	
PERSONNEL									
Project director		\$0.00		\$5.00	\$0.00	\$5.00	\$5.00	#DIV/0!	
Project bookkeeper		\$0.00		\$0.00	\$0.00	\$0.00	\$0.00	#DIV/0!	
Other paid staff of applicant organization		\$0.00		\$0.00	\$0.00	\$0.00	\$0.00	#DIV/0!	
Professional services		\$0.00		\$0.00	\$0.00	\$0.00	\$0.00	#DIV/0!	
Volunteers		\$0.00		\$6.00	\$0.00	\$6.00	\$6.00	#DIV/0!	
Subtotal	\$0.00	\$0.00	\$0.00	\$11.00	\$0.00	\$11.00	\$11.00	#DIV/0!	
MATERIALS & SUPPLIES									
EQUIPMENT		\$0.00		\$9.00	\$0.00	\$9.00	\$9.00	#DIV/0!	
MARKETING & PROMOTION		\$0.00		\$3.00	\$0.00	\$3.00	\$3.00	#DIV/0!	
PRINTING & PUBLICATION		\$0.00		\$4.00	\$0.00	\$4.00	\$4.00	#DIV/0!	
PROFESSIONAL DEVELOPMENT		\$0.00		\$0.00	\$0.00	\$0.00	\$0.00	#DIV/0!	
TRAVEL		\$0.00		\$0.00	\$0.00	\$0.00	\$0.00	#DIV/0!	
		\$0.00		\$0.00	\$0.00	\$0.00	\$0.00	#DIV/0!	
Construction Budget Total (from Itemized Constr. Budget Report)									
		\$0.00		\$0.00	\$0.00	\$0.00	\$0.00	#DIV/0!	
Subtotal	\$0.00	\$0.00	\$0.00	\$16.00	\$0.00	\$16.00	\$16.00	#DIV/0!	
Totals		\$0.00		\$27.00	\$0.00	\$27.00	\$27.00	#DIV/0!	
% of Total Project Cost	#DIV/0!	0	#DIV/0!	100%					