



## Sample Ohio History Fund Application For Reference Only

You will find below a sample Ohio History Fund application and Budget Spreadsheets for the current grant cycle. We share the application and spreadsheets so that you can review them prior to logging into the Fund's online grant application system.

If you decide to apply (and we hope you do), you must log into the system and create an account. It's easy to do and free and has been completed by more than 500 applicants since the History Fund began in 2012. For more information about creating an account, see "Guide to Setting up an Account" at the Ohio History Fund's website: [www.ohiohistory.org/historyfund](http://www.ohiohistory.org/historyfund).

**The History Fund only accepts applications submitted through the program's online grant application system. *No paper applications are accepted.***

To create an account and log in, go to [www.ohiohistory.org/historyfund](http://www.ohiohistory.org/historyfund). Click on "Apply for a Grant."

**Questions?** We are happy to help! Contact:

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# History Fund Grant Application (FY27)

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*Ohio History Connection*

## *Introduction*

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**Application deadline: September 8, 2026 by 11:59 pm.** This deadline is firm and will not be extended.

There are eight parts to the History Fund grant application:

1. Project Name & Funding Category
2. Abstract
3. Applicant Information
4. Project Narrative - ***complete the Project Narrative and Budget sections first. It makes it much easier to complete the Grant Project Data section and write the Abstract.***
5. Budget - ***complete the Project Narrative and Budget sections before completing the rest of the application.***
6. Grant Project Data
7. Elected Officials
8. Signatures & IRS Form 990

To make the online application process go smoothly:

- Review the documents below, in ***bold***, by clicking [HERE](#). The link takes you to the "Applying for a Grant" page of the History Fund's website. Click on tab #2, "Grant Application & Forms".
- Read the ***Ohio History Fund Grant Guidelines***. Reviewing the *Guidelines* will that ensure your project meets the program's basic requirements.
- Print the ***Grant Submission Check List*** and review the ***Sample History Fund Grant Application*** before you begin. Refer to both as you complete your online application.
- To help you fill out your budget form, see ***Sample Budget Spreadsheets***, which are examples of completed budget forms.

- If your project includes a purchase of \$6,000 or more, or is a Bricks & Mortar, or digitization project, follow the requirements in this section: "BUDGET / Requests for Proposals (RFPs) & Procurement Requirements."
- To understand how your application will be evaluated, read *Sample Reviewer Forms* by clicking [HERE](#). The link takes you to the "Applying for a Grant" page of the History Fund's website. Click on tab #3, "Application Review".
- Compose your application "offline" then copy and paste your answers into the online application. Save a copy of your application for your files.
- **Uploads:** There are items you will need to electronically attach ("upload") to your online application. You will need to create or scan these items, save them on your computer, and upload them to the application.
- Three forms are a part of the application: **1) Work Schedule, 2) Budget Form, and 3) Signatures of Authorization** form.
  - Find all three by clicking [HERE](#), which takes you to the "Applying for a Grant" page of the History Fund's website. Click on tab #2, "Grant Application & Forms".
  - The **Budget Form** includes tabs for the **Budget Spreadsheet** (required for all applications), a **Construction Budget Spreadsheet** (required Bricks & Mortar projects only), and instructions.
- To use all forms: click on a form, save it to your computer, fill out the form on your computer, and upload the completed form to the application.
- **All uploads must be legible.** Applications with illegible attachments will not be reviewed.
- Create a folder to file all of your History Fund application-related documents for handy retrieval later.
- **Uploading multiple photographs and documents:** where indicated in the application, save into a single Word or PDF attachment all photographs and documents required. Upload that one attachment. **Do not** attempt to upload multiple photographs/documents directly into the grant software. It will allow only the one document. The "workaround" is to save all your photographs/documents into a single attachment (Word or PDF) and upload that one attachment. If the attachment includes photographs, include a "key," or description of the photographs.
- Shoot and save your photos at high resolution (300 ppi). Upload low resolution (72 ppi) versions of the photos to your document. If your proposal is funded, high resolution images will be required later.

- **Regularly save your application as you work on it, especially when you upload a document.**

## 1. Project Name & Funding Category

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### Project Name\*

Character Limit: 100

### Project Location\*

Enter the **name, street address, city, and ZIP code** where the project will take place. The location where the project will occur may or may not be the same as the applicant organization's mailing address. Do not enter a P.O. Box.

Character Limit: 1000

### Funding Category\*

Select the category which describes your project: **Bricks & Mortar, Organizational Development, or Programs & Collections**. For descriptions of each category, see the *Ohio History Fund Grant Guidelines*. [CLICK HERE](#) to find the *Guidelines*.

#### Choices

Bricks & Mortar

Organizational Development

Programs & Collections

## 2. Abstract

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### Abstract\*

The abstract summarizes your project in one paragraph. Write the abstract **after** you have finalized the rest of the application. Limit the abstract to approximately 150 words (900 characters). We use the abstract to introduce your project to grant evaluators and to summarize the range of projects for reporting and publicity requirements.

Answer these questions in your abstract:

- What will your project accomplish?
- How will you complete the project?
- How will the completion of the project benefit your organization and your community?
- **NOTE:** We suggest you start your abstract with the same sentence you may have started your Statement of Need with: "With a \$AMOUNT grant from the History Fund, the XYZ Historical Society will...."

Character Limit: 900

### 3. Applicant Information

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**Reminder:** You provided the contact information for your organization when you registered on the History Fund website.

#### Organization Status\*

Select either: 1) Nonprofit organization incorporated in Ohio, or 2) Public entity (unit of local government, educational institution, public library, etc.).

#### Choices

Nonprofit organization incorporated in Ohio

Public entity (unit of local government, educational institution, public library, etc)

#### Nonprofit Organizations:

- Record your organization's **State of Ohio Nonprofit Entity Number** where indicated below. Your Ohio Nonprofit Entity Number is proof that your organization is registered and in good standing in the State of Ohio. **NOTE:** your organization's Nonprofit Entity Number is **not the same** as your Federal Tax ID number - they are distinct and different numbers.
  - o Only organizations with the status of "**active**" are eligible to apply. See below to find your number and organizational status.
  - o Organizations whose status is listed as "**held**" must contact the Ohio History Fund prior to applying; otherwise the application will not be considered.
  - o Applications from organizations listed as "**cancelled**" or "**dead**" will not be considered.
- Applications from nonprofit organizations that do not include a State of Ohio Nonprofit Entity Number will not be considered.
- Upload your organization's **IRS letter of determination** proving non-profit status. **NOTE:** Applications from nonprofit organizations that do not include an IRS letter of determination will not be considered.
- Upload your latest **Form 990 tax return** at the end of the application, under Section 8, "Signatures & IRS Form 990." **NOTE:** Applications from nonprofit organizations that do not include a Form 990 will not be considered.

#### Public Entities:

- Federal Tax ID number (also known as EIN)

### State of Ohio Nonprofit Entity Number - Nonprofit Organizations

Enter your State of Ohio Nonprofit Entity Number. [CLICK HERE](#) and enter your organization's "Business Name" to find your Nonprofit Entity Number.

*Character Limit: 20*

### IRS Letter of Determination - Nonprofit Organizations

Attach your organization's IRS letter of determination proving nonprofit status (required).

*File Size Limit: 1 MB*

### IRS Form 990 - Nonprofit Organizations

Upload your latest Form 990 at the end of the application, in **Section 8. Signatures & IRS Form 990**. The 990 is a snapshot of your organization's financial condition. Depending on your organization's gross assets and receipts, you may file Form 990, Form 990-EZ, or Form 990-N. **NOTE:** Applications from nonprofit organizations that do not include a Form 990 will not be considered.

### Federal Tax Identification Number (also known as EIN) - Public Entities & Nonprofits

Indicate your tax ID number (required). To find a lost or misplaced EIN [CLICK HERE](#).

*Character Limit: 20*

### Project Director

The Project Director leads the project. They serve as the contact between the applicant organization and the History Fund. The Project Director is also responsible for certifying compliance with History Fund regulations and for submitting required Mid-Project and Final Project reports. *The Project Director may serve as the Authorizing Official for a project. The Project Director may **not** serve as the Project Bookkeeper.*

### First Name of Project Director\*

*Character Limit: 100*

### Last Name of Project Director\*

*Character Limit: 100*

### Position or role in applicant organization\*

*Character Limit: 100*

**Same phone number as applicant organization?\***

**Choices**

Yes

No

**If no, indicate project director's phone number**

*Character Limit: 12*

**Same email address as applicant organization?\***

**Choices**

Yes

No

**If no, indicate project director's email address**

*Character Limit: 100*

### **Project Bookkeeper**

The Project Bookkeeper is responsible for receiving, disbursing, and accounting for all grant and matching funds for the project. The bookkeeper should have experience in standard accounting procedures. *The Project Bookkeeper shall **not** also serve as the Project Director or Authorizing Official. Family members, spouses, or the partners of the Project Director or Authorizing Official shall **not** serve as the Project Bookkeeper.*

**First Name of Project Bookkeeper\***

*Character Limit: 100*

**Last Name of Project Bookkeeper\***

*Character Limit: 100*

**Position or role in applicant organization\***

*Character Limit: 100*

**Same phone number as applicant organization?\***

**Choices**

Yes

No

**If no, indicate project bookkeeper's phone number**

*Character Limit: 12*

**Same email address as applicant organization?\***

**Choices**

Yes

No

**If no, indicate project bookkeeper's email address***Character Limit: 100***Authorizing Official**

The Authorizing Official has the authority to obligate the organization to the proposed grant project and, if funded, accepts overall responsibility for its completion. *The Project Director may also serve as the Authorizing Official for a project. The Authorizing Official may **not** serve as the Project Bookkeeper*

**First Name of Authorizing Official\****Character Limit: 100***Last Name of Authorizing Official\****Character Limit: 100***Position or role in applicant organization\****Character Limit: 100***Same phone number as applicant organization?\*****Choices**

Yes

No

**If no, indicate authorizing official's phone number***Character Limit: 12***Same email as applicant organization?\*****Choices**

Yes

No

**If no, indicate authorizing official's email address***Character Limit: 100*

## 4. Project Narrative

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**Our review panel will base its funding decisions primarily on your Project Narrative and Budget. Put your best foot forward!**

The Project Narrative consists of four sections: 1) Applicant Organization Profile, 2) Statement of Need, 3) Description of Impact, and 4) Project Design & Resources, which includes your project's budget.

Answer the questions in the fields below to demonstrate how your project meets the goals of the History Fund, as outlined in the *Ohio History Fund Grant Guidelines* found [HERE](#).

Assume that the experts evaluating your application know little about your organization. Our review panel members are experts in their fields, but they are not expected to know details about your particular organization, other than what you provide in your application.

Use the text of your narrative to convince grant reviewers of the value of your project, rather than linking to external websites. Some reviewers print and evaluate applications in paper form, so may not have access to Web links while reviewing.

To keep applications concise and manageable, **applicants are limited approximately 2,000 words (12,000 characters) for the four sections combined.**

### 1) Applicant Organization Profile\*

Briefly describe your organization. Grant reviewers want to know:

- What is your organization's mission?
- How long has your organization existed?
- Describe three or four of your organization's recent achievements.

*Character Limit: 1500*

### National Register of Historic Place Reference Number

**NOTE: Bricks & Mortar applications to rehabilitate historic buildings:** record where indicated the National Register reference number for the structure. This number is proof of listing in the Register and is required.

To find a reference number, [CLICK HERE](#). The link will take you to the National Register of Historic Places National Register Database and Research page.

- If you need help finding a reference number for a structure, contact the State Historic Preservation Office: [shpo@ohiohistory.org](mailto:shpo@ohiohistory.org) or 614-298-2000. Include the address and city of the structure in your inquiry.

If the building is a Contributing Structure to a National Register Historic District and is not listed individually, write "Contributing Structure" after the reference number. Have proof of Contributing Structure status handy if needed during the grant review period.

**NOTE:** A building that is the subject of the grant must be listed in the National Register of Historic Places or according to the terms of a local historic preservation ordinance *prior to* the grant application deadline.

*Character Limit: 100*

## 2) Statement of Need\*

Grant reviewers need to know:

- What do you plan to do?
- How is your project a *history* project and why is this project important?
- Why do you need to take on *this* project at *this* time? In other words, why is your project timely?
- **NOTE:** The beginning sentences in the Statement of Need should concisely describe what you plan to do. Example: "With a grant of \$3,000 from the History Fund, the XYZ Historical Society will digitize five historic county atlases and publish them on the Society's website..."

*Character Limit: 3000*

## 3) Description of Impact\*

Grant reviewers need to know:

- Who will be served by this project? Why this audience(s)?
- How will you demonstrate to the public that this project is a success? Explain how you will show that your project was a success.
- How will the project improve your organization?
- How will this project make your community better than it already is?
- To describe how you will measure the success of your project, be specific and address questions like "how many," "when," "where," "what," "who." See **Examples of Impact** below.
  - If awarded a grant, you and the History Fund will use these measures to evaluate the impact of your project.
  - Applications that answer these questions well are more competitive than those that don't.

*Character Limit: 2500*

### **Examples of Impact:**

*Collections care projects:* indicate the number of artifacts and/or archival items the project will address. Also state clearly state that your organization owns the artifacts and/or archival materials.

*Historic building rehabilitation projects:* explain what parts of the structure will be preserved and why it's necessary for its overall good of the building, its contents, and your community at large. For example, if one of the impacts is energy savings, report how much your organization will save.

*Digitization projects:* state how many items will be digitized and how you will preserve and enable access to the digitized data. Also indicate that one of following three conditions apply:

- 1) Materials to be digitized must no longer be restricted by copyright,
- 2) You, the applicant organization, holds copyright to the items, or
- 3) Copyright has been turned over to you or ceded to the public domain.

If the project involves the use or creation of a website or social media, indicate how you will track usage of the site / social media.

*Public programs and exhibits:* estimate how many attendees you expect to attract and describe how you will assess whether program was meaningful to them.

#### 4) Project Design & Resources\*

- Reviewers are looking for convincing explanations of how you will complete your project. Describe how you will competently execute the project step-by-step. In the Work Schedule, list those steps in chronological order and assign dates for the start and completion of each step. Each step should logically follow from the previous one. In your Work Schedule show that have allowed enough time to complete each step.
- Identify the professional standards and best practices relevant to this project. **Explain how your project will meet those standards.** For standards and best practices that govern the varieties of history projects the Fund supports, [CLICK HERE](#) to see the *Ohio History Fund Grant Guidelines*, "Apply Professional Standards and Best Practices."
  - o **NOTE:** The most competitive proposals explain how professional standards/best practices apply to project activities.
- Who will do the work? Explain that qualified people have been secured or will be hired to complete the project. Explain why they are qualified. Upload below statements of qualifications and/or resumes of project personnel. If your project plans to hire staff, upload their job description(s).
- Compile a budget using the Budget Form included in this application. Refer to the Budget section for instructions.
  - o **NOTE:** Use of the History Fund's Budget Form is required.

*Character Limit: 5000*

#### Work Schedule Instructions

The Work Schedule is your project's timeline. The Work Schedule and the narrative in the Project Design & Resources section should work together. Explain in Project Design & Resources

how you will competently execute the project step-by-step. In the Work Schedule, list those steps in chronological order and assign a start date and a completion date for each step.

Maximum duration of History Fund grant projects:

- Bricks & Mortar projects: *up to 24 months*
- Organizational Development projects: *up to 12 months*
- Programs & Collections projects: *up to 24 months*

The Work Schedule should list **each significant step** in order and the outcome that will result, **how many days** each step will take, and the **dates** each step will start and end. **Reminder.** use your Work Schedule to show that you have allowed enough time to complete each step of your project.

The Work Schedule must include the Start and End Dates. **All projects should assume a start date after May 1.** Do not enter a start date for your project that falls before May 1. Projects with a start date before May 1 will not be considered. Grant awards are announced in February. Between February and May 1, we send and must receive back from you grant agreements and paperwork.

If your project requires a Request for Proposal (RFP), include dates for drafting and submitting the RFP for review, and dates for soliciting and reviewing bids in your Work Schedule. **Allow 30 days in your schedule for the History Fund to review draft RFPs.** Bricks & Mortar projects and others requiring RFPs may not begin until the History Fund has reviewed and approved the RFP.

Although optional, consider adding dates for a Mid-Project and Final Project Reports to complete your Work Schedule. If your project is funded, Mid- and Final Projects reports and deadlines for the submission of each will be required. Mid-Project Reports are due approximately halfway through a project and Final Project Report are due within 30 days of the project End Date.

### Work Schedule Tips

- Think of “Outcomes” as smaller objectives along the way to completing your larger History Fund-funded project. These objectives, with “work days” and start and completion dates, will constitute your project’s Work Schedule.
- “Work days” are the number of days spent on an activity, *not* the days of the week (Monday – Sunday) that you will work on the project.
- Work Schedule items can occur simultaneously, or one can begin before another ends. If steps overlap, be clear about why.
- History Fund staff may, at its discretion, request draft products for review during the grant period.

## Work Schedule UPLOAD\*

See instructions above before completing the Work Schedule.

[CLICK HERE](#) to find and download a blank Work Schedule. The link takes you to the "Applying for a Grant" page. Click on tab #2 "Grant Application & Forms" to find the Work Schedule. Fill out the schedule and upload your completed form.

The Work Schedule form is a Microsoft Excel spreadsheet. If you do not have access to Excel or cannot download the Work Schedule form, contact the History Fund.

*The form will not be attached to the application until you click **Save Application** below.*

*File Size Limit: 1 MB*

## Image Instructions - *Tips for Persuasive Pictures*

*Photographs and images are worth a thousand words and can be a **deciding factor** in whether an application is funded. The review panel should see the need for your project in the photographs you submit.*

For Bricks & Mortar projects, photographs are **required and essential**. Reviewers cannot visit your site in person and so rely on photos. Images **must** include:

- **One or more photographs of exterior of the building**
- **All exterior elevations and interior views, as applicable to the project**
- **Close-up views of affected areas**
- **Floor plans of affected areas, as applicable**

Provide a "photo key" that describes the images and that tells grant reviewers what they are looking at. Include in the key the

1. Grant project title,
2. Applicant organization,
3. Property name and address,
4. Photo date, and
5. A description of each view (sample descriptions: "west elevation," "second floor hallway looking north,"). The total size of uploads must not exceed 5 MB.

You are required to upload at least one photograph or image of your project. If you receive a grant, this image will be used to illustrate your project in announcements of History Fund grant recipients.

## Images UPLOAD\*

**Uploading images:** save into one Word or PDF document all images that you want to submit in your application. Upload that one document. **Do not** attempt to upload multiple images directly into the grant software. It will only allow the one image at a time. The “workaround” is to save all your photographs into one document (Word or PDF) and upload that one document, which is to contain many images as well as the “photo key” (the description of the images).

See "Image Instructions - aka Tips for Persuasive Pictures" above before uploading images.

*File Size Limit: 7 MB*

## Project Personnel Instructions

Grant reviewers need to know that the people assigned to your project are qualified to complete it. Upload statements of qualifications or resumes of project personnel, including the Project Director, Project Bookkeeper, and any others responsible for the success of the project.

If you intend to hire staff or interns for the project, include a job description for the position(s) in your statement of qualifications/resumes document.

If there are external partners, explain their role in the project.

If you need to hire an outside firm to complete project work, you may be required to submit a Request for Proposal (RFP) for the History Fund’s review and approval. RFPs are NOT due at the time of application. RFPs are only required if you receive a grant. **See BUDGET / "Requests for Proposals & Procurement Requirements" below for more about RFPs.**

## Project Personnel UPLOAD\*

**Uploading Project Personnel Information:** Copy and paste into one Word or PDF document all the statements of qualifications/resumes and job descriptions that you want to submit with your application. Upload that one document where indicated below. Do not attempt to upload multiple documents directly into the grant software. It will only allow the one document.

*The form will not be attached to the application until you click **Save Application** below.*

See instructions above before uploading Project Personnel materials.

*File Size Limit: 3 MB*

## Letters of Commitment - *Do we need them?*

Letters of commitment are required if the applicant is a “Friends” group whose project is in support of its parent site. For example, a “Friends of the Library” group must include a letter from the library director or president of the library’s board stating that the parent site approves of and will support the completion of the project.

**If the project's success depends on partnerships with other organizations, the director or president of a partner must write a letter indicating that it will fulfill its role as described in the application.**

Letters of *commitment* are *not the same* as letters of *support*. A letter of commitment is an official promise to help complete the project if funded. Letters of support state that the project is worthy of a grant in the writer's opinion, but does not commit the writer's organization to a role in the project. Letters of commitment are more persuasive than letters of support to the History Fund.

### Letters of Commitment UPLOAD

**Uploading Letters of Commitment:** do not attempt to upload multiple such letters directly into the grant software. It will allow only one a time. Instead, copy and paste all letters of commitment into a single Word or PDF document and upload that one document.

See "Do We Need Letters of Commitment?" above.

*File Size Limit: 1 MB*

### Site Management Agreement - Ohio History Connection sites

For **Ohio History Connection Site Management Organizations ONLY**. Upload the latest, up-to-date version of your site management agreement with the Ohio History Connection. The agreement is **required** for your application to be considered for a grant. Functions and fiscal responsibilities assigned to the Ohio History Connection under site management agreements are ineligible for grants from the History Fund.

*The agreement will not be attached to the application until you click **Save Application** below*

*File Size Limit: 1 MB*

## 5. Budget

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### Budget Preparation - Overall Guidance

Grant Amount Minimums & Maximums:

- **Bricks & Mortar** and **Programs & Collections** funding categories: You may request no less than \$2,000 and no more that \$20,000.
- **Organizational Development** category: the minimum request is \$1,000 and maximum is \$4,000.

History Fund grants are **matching grants**. Your organization has to help cover the costs of its project. See **Match Instructions** below.

Budget estimates should be realistic and based upon fair and open competition among suppliers of services, materials, and equipment. See **Requests for Proposals & Procurement Requirements** below.

All project costs must relate directly to the accomplishment of the project described in the narrative. Indirect costs will not be allowable charges against a grant award unless you specifically include them as a line item your project budget. (Indirect costs defined: "the expenses of doing business that are not readily identified with a particular grant, contract, project function or activity, but are necessary for the general operation of the organization and the conduct of activities it performs.")

All grant funds and match amounts are to be used during the grant period. No grant funds or match may be spent before that start or after the end of the grant period.

The Budget Form consists two spreadsheets: **1) Budget Spreadsheet, 2) Construction Budget Spreadsheet**. The Form also includes definitions and explanations of terms used in the spreadsheets. Navigate among them by clicking the colored tabs at the bottom left side of the Form.

A completed Budget Spreadsheet is **required for ALL** applications. For Bricks & Mortar projects, a Construction Budget Spreadsheet is **also required**.

- Fill out the following columns in the Budget Spreadsheet: "**Budget Item,**" "**Units,**" "**Rate/Unit,**" "**Total Cost,**" "**History Fund Grant Request,**" "**Match,**" and especially the "**Source of Match,**" "**Kind of Match,**" and "**Match Pending (P) or Confirmed (C)**" columns. *All are required.*
- Itemize budget expenses in the column titled "Budget Item." Also use the Budget Item column to show calculations of time and materials, etc. Do not itemize items or show calculations in the "Budget Category" column (the form will not let you).
- **Do not use symbols (\$) or commas when you enter figures into columns requiring numbers - just enter numbers.** The spreadsheets will do the math for you and auto-fill totals (but you should still double-check it).
- Find examples of completed budgets by reviewing *Sample Budget Spreadsheet* [HERE](#).

**Your budget must include the time and rate for a Project Director and a Project Bookkeeper - even if they are volunteers.** Applications whose budgets that do not include a Project Director or Bookkeeper will not be considered. See Match Instructions below for details.

Include in your budget the cost of outdoor signage to acknowledge History Fund support. This cost applies to Bricks & Mortar or highly visible Programs & Collection projects. These projects usually require large outdoor signs or banners. The cost of signage may be charged to the grant.

Label and classify every expense; no expense labeled “miscellaneous” is allowed. Use Budget Narrative field to elaborate on budget items that require explanation.

Round cents to the nearest dollar.

### Match Instructions

"Match" is your organization's share of the cost for your project. Match can take many forms, including cash, donated goods and services, the monetary value of volunteer and paid staff time, and other grants specifically and solely for the project.

Match amounts must equal or exceed the percentages listed below. *Applications that do not meet Match minimums will not be considered.*

- **Bricks & Mortar** projects and **Programs & Collections** projects: minimum 40% Match of Total Project Cost is required. Match *can* exceed 40%, but *cannot* fall below 40%
- **Organizational Development** projects: minimum of 20% Match of Total Project Cost is required. Match *can* exceed 20%, but *cannot* fall below 20%.

History Fund grants pay up to 60% of the Total Project Cost for **Bricks & Mortar** and **Programs & Collections** projects, and up to 80% for **Organizational Development** projects.

**NOTE:** Secure most of your matching support prior to submitting the application. Applications that show most matching support as “confirmed” compete better against applications that show matches “pending.” In the narrative section of “Project Design and Resources” above, indicate how you plan to complete the project if sources of match labeled “pending” do not materialize.

### *Calculating Volunteer Time for Match*

The time unpaid volunteers devote to a project can be an important source of match. Volunteer time is to be calculated at no less than **\$15.00 per hour**.

Exceptions: If a volunteer is doing work for which they are or were paid, you are welcome to charge their paid rate. Examples: a retired CPA serving as project bookkeeper, former educator serving as the project director of a school program, a librarian volunteering as project director for an archives project.

- **NOTE:** If you need to cite a rate higher than the \$15.00 per hour, **contact the Ohio History Fund for prior approval**. State that the History Fund gave approval in the Budget Narrative.

### *Using Paid Staff Time for Match*

Charge your paid employee(s) regular hourly rate(s). **Do not** include calculations of fringe

benefits in the hourly rate or the overall budget. It is disallowed.

You may charge all of an employee's time for the project to Match or divide the cost between Match and your grant request.

After the History Fund approves the RFP, you will award the contract to a responsive bidder based on written selection criteria in your approved RFP.

To ensure that small businesses, minority-owned firms, and women's business enterprises (WBE) are used to the fullest extent practicable, recipient agrees to visit the Ohio Department of Administrative Services Minority Business Enterprise (MBE) Program website to search for certified MBE and WBE businesses and to document inclusion of such businesses in their procurement process.

[For more about RFPs, CLICK HERE](#). The link takes you to the "Grant Administration" page of the History Fund's website. Find information about RFPs under "History Fund Resources."

### Cost Estimate Instructions

Attach cost estimates for major work items if relevant to your project. The History Fund strongly recommends that you obtain estimates of major cost items to use in preparing your budget. Written estimates show grant reviewers where you got your numbers.

**Uploading Cost Estimates:** do not attempt to upload multiple cost estimates directly into the grant application software. It will allow only one document at a time. Instead, copy and paste all cost estimates into a single Word or PDF document and upload that one document.

*The upload will not be attached to the application until you click **Save Application** below*

*File Size Limit: 3 MB*

### Requests for Proposals (RFPs) & Procurement Requirements

History Fund procurement policies and procedures are designed to encourage competition among vendors to ensure the highest quality products and services at the lowest price. Should your project receive a History Fund grant, you must comply with the following regarding purchases listed in the project budget.

#### Purchases Under \$5,999

Except for Bricks & Mortar, Digitization, or other projects for which they are deemed necessary, you are encouraged to solicit competitive proposals for purchases of good and services *under* \$5,999. Three competitive proposals are suggested. Documentation of purchase costs may include notes of verbal price quotes and written proposals, including the name of person contacted, date of proposal, and quoted amount.

**Purchases Over \$6,000 - Request for Proposal (RFP) Required**

For purchases of goods and services over \$6,000, for Bricks & Mortar, digitization projects, or for any project the History Fund deems it necessary, you must solicit competitive bids with a Request for Proposal (RFP).

Requests for Proposal are **not** required at the time of application.

Projects requiring RFPs may not begin until the History Fund has reviewed and approved the RFP in writing.

*Do not* purchase goods or hire services for your project until a grant award is made, and your project starts. You will not know if you can complete the purchase before you receive the grant! The History Fund must approve the RFP you use to purchase/hire. The History Fund cannot review an RFP prior to the award of the grant.

If you name in your application a firm or consultant you want to hire, you will still be required to seek bids using an RFP approved by the History Fund. The firm/consultant you name is welcome to bid. **To avoid a conflict of interest, however, any firm/consultant involved in preparing the RFP cannot be hired to carry out the work.**

If circumstances require that you hire a firm or consultant prior to a grant award, contact the History Fund as soon as possible during the application process and well before the application deadline. You must demonstrate that you used a fair and open selection process and may be required to provide the RFP and other documents used to solicit bids.

RFPs for Bricks & Mortar projects must comply with the *Secretary of the Interior's Standards for the Treatment of Historic Properties*, found [HERE](#). For a collections storage facility, see applicable standards for collections care under "Collections" in *Ohio History Fund Guidelines*, found [HERE](#).

RFPs for other projects will meet standards and best practices for the type of project in question. For standards/best practices for various types of projects, see *Ohio History Fund Guidelines*, found [HERE](#).

Proposals must be solicited from an adequate number of qualified sources to permit reasonable competition consistent with the nature and requirements of the procurement.

**Downloadable Budget Form and UPLOADS:\***

The Budget Form is available for download is a Microsoft Excel spreadsheet. If you do not have access to Excel or cannot download the Budget Form, contact the History Fund.

Use of the History Fund's Budget Form is required. Please do not substitute another type of

form or spreadsheet.

See **Budget Preparation - Overall Guidance** above for instructions on how to complete the Budget Spreadsheet.

Find the Budget Form by clicking [HERE](#), which takes you to "Applying for a Grant" on the History Fund website. Click on tab #2, "Grant Application & Forms." The page also includes examples of budget spreadsheets to guide you - see "Sample Budget Spreadsheets")

*The spreadsheet will not be attached to the application until you click **Save Application** below.*

*File Size Limit: 2 MB*

### Budget Narrative

Use the Budget Narrative field if needed to elaborate on any budget items that require additional explanation. Explanations are limited to approximately 500 words (3,000 characters)

*Character Limit: 3000*

## 6. Grant Project Data

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To complete the Grant Project Data section, simply copy the **sums** from the Budget Spreadsheet and the **dates** from your Work Schedule into the appropriate fields below- that's it! The few minutes it takes you to do this enables us to quickly and efficiently compile reports our reviewers use to evaluate proposals.

- **NOTE:** If the dates and/or sums recorded in this section do not match those in the Work Schedule and/or Budget Spreadsheet, the History Fund will use the dates/sums in the Work Schedule/Budget Spreadsheet attachments.

### Grant Request Amount\*

Record the dollar amount of your grant request here **after** you finalize your budget. The amount here must be identical to the total at the bottom of the "History Fund Grant Request" column on your Budget Spreadsheet.

*Character Limit: 10*

### Match Amount\*

Record the total amount of your match here **after** you finalize your project's budget. The amount here must be identical to the total at the bottom of the "Match" column on your Budget Spreadsheet.

*Character Limit: 10*

### Total Project Cost Amount\*

Total Project Cost = Grant request + Match. Fill in the total project cost here **after** you finalize your budget. The amount here must be identical to the total at the bottom of the "Total" line in your Budget Spreadsheet.

*Character Limit: 10*

### Percent Match is to Total Project Cost\*

Match is \_\_\_\_% of the total project cost. Match requirements are described in the Budget section.

- To calculate the Match percentage, **divide amount of the Match by the Total Project Cost**. Example: \$5,272 (Match) / \$9,500 (Total Project Cost) = .5549 or 55%.
- **Reminders:** for Bricks & Mortar and Programs & Collections projects a minimum 40% Match of the Total Project Cost is required. Match *can* exceed 40% but *cannot* fall below 40%. For Organizational Development projects a minimum of 20% Match of Total Project Cost is required. Match *can* exceed 20% but *cannot* fall below 20%. (History Fund grants pay up to 60% of the Total Project Cost for Bricks & Mortar and Programs & Collections projects, and up to 80% for Organizational Development projects.)

*Character Limit: 3*

### Project Dates

Enter in the boxes below your project's Start and End Dates. Dates for the submission of Mid- and Final Reports are optional but will be required if your proposal is funded.

Record project dates in this section **after** you finalize your project Work Schedule. The project dates here must match those in your Work Schedule.

The History Fund recognizes that dates in this section may change, because of circumstances between grant application deadline in September and the start of the project in May of the following year.

### Project Start Date\*

Enter the start date of your project from your Work Schedule. **Reminder:** Projects must start **after** May 1. *Do not* enter a start date for your project prior to May 1.

*Character Limit: 10*

### Request for Proposal (RFP) Review Date

If your project requires a Request for Proposal (RFP), enter the date you will submit your draft for review to the Ohio History Fund. Reviews take approximately 30 days for our staff to

complete. For more about RFPs and whether they are required for your project, see [BUDGET / Requests for Proposals \(RFPs\) & Procurement Requirements](#).

*Character Limit: 10*

### Mid-Project Report Submission Date

A Mid-Project Support Submission Date is optional, but preferred. If your project is funded, the History Fund will work with you to determine a due date for your report. A grant recipient is required to submit Mid-Project Report.

If you have a date for your Mid-Project Report in your Work Schedule, enter it here. The date when you submit the report should be at the approximate midpoint of your project.

To see a sample Mid-Project Report, as well as Final Project Report, [CLICK HERE](#). The link is to the Grant Administration page on the History Fund's website.

*Character Limit: 10*

### Project End Date\*

From your Work Schedule, enter the End Date of your project. **Reminder:** Bricks & Mortar and Programs & Collections projects can be up to 24 months in duration, but cannot exceed that limit. Organizational Development projects are limited to 12 months.

*Character Limit: 10*

### Final Project Report Submission Date

A Final Project Submission Date is optional, but preferred. A grant recipient is required to submit a Final Project Report.

If you have a date for your Final Project Report in your Work Schedule, enter it here. If your project is funded, the due date of your Final Project Report is to be later than 30 days after the Project End Date.

To see a sample Final Project Report (as well as Mid-Project Report) [CLICK HERE](#). The link is to the "Grant Administration" page on the History Fund's website. Find the sample reports under "History Fund Resources".

*Character Limit: 10*

## 7. Elected Officials

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Indicate the name and district numbers of your organization's Ohio House, Ohio Senate, and U.S. House of Representatives member at the time of the application.

**NOTE:** Enter the names of elected representatives associated with the address of your organization's headquarters. (Some organizations, such as county historical societies or libraries, serve constituents in more than one legislative district.)

If your application is funded, the History Fund requires that you inform your Ohio House, Ohio Senate, and U.S. Congressional representatives of your award.

### Ohio House District Number and Representative Name

To find your district number and representative, click on <https://www.legislature.ohio.gov/members/district-maps>. Use the address of your organization's headquarters if your service area extends over district boundaries.

### Ohio House District Number\*

*Character Limit: 10*

### State Representative Name\*

*Character Limit: 100*

### Ohio Senate District Number and Senator Name

To find your senate district number and senator, click on <https://www.legislature.ohio.gov/members/district-maps>. Use the address of your organization's headquarters if your service area extends over district boundaries.

### Ohio Senate District Number\*

*Character Limit: 100*

### State Senator Name\*

*Character Limit: 100*

### U.S. House of Representatives District Number and Name of Member of U.S. House of Representatives

To find your district number and representative, click on <https://www.govtrack.us/congress/members/OH#representatives>. Use the address of your organization's headquarters if your service area extends over district boundaries.

### U.S. House of Representatives District Number\*

*Character Limit: 100*

### Name of Your Member of U.S. House of Representatives\*

*Character Limit: 100*

## 8. Signatures & IRS Form 990

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### Signatures of Authorization\*

[CLICK HERE](#) to find the Signatures of Authorization Form. Complete the agreement, have the appropriate parties sign it, and upload here. Scan or photograph the form and upload the document to the application.

**Reminder:** The project bookkeeper shall **not** also serve as the project director or authorizing official. Family members, spouses, or the partners of the project director or authorizing official shall **not** serve as the project bookkeeper.

*The form will not be attached to the application until you click **Save Application** below.*

*File Size Limit: 1 MB*

### Form 990 - Nonprofit Organizations

Attach your latest Form 990 tax return. **Reminder:** Applications from nonprofit organizations that do not include a Form 990 will not be considered. For more information, see **Section 3. Applicant Information.**

*The form will not be attached to the application until you click **Save Application** below.*

*File Size Limit: 7 MB*

# Work Schedule Spreadsheet

## Sample Ohio History Fund Application

### For Reference Only

The Ohio History Fund shares these worksheets so that you can review them prior to logging into the Fund's online grant application system.

The online Work Schedule form is an Excel Spreadsheet. Find it at:  
[www.ohiohistory.org/historyfund](http://www.ohiohistory.org/historyfund) > "Apply for a Grant"

**Reminder:** the History Fund only accepts applications submitted through the program's online grant application system. *No paper applications or Work Schedules are accepted.*

**Work Schedule Form - History Fund**

**Grant Project Title:**

**Applicant Organization:**

**NOTE:** Items marked with an asterisk (\*) are **required**. In addition to sketching out the timeline of your project, your Work Schedule must include **Start** and **End Dates** for the overall project. **When finalized, enter the dates in the Project Dates fields in "Grant Project Data" section of application.**

**Dates for Request for Proposal :** If your project will require a Request for Proposal (RFP), include dates for the submission and review of a draft of the RFP. Allow a minimum of 30 days for us to review your RFP. See the Application for details.

Although optional, consider adding dates for a **Mid-Project** and **Final Project Report** to complete your Work Schedule. If your project is funded, Mid- and Final Projects reports and deadlines for the submission of each will be required. A Mid-Project Report is due approximately halfway through a project and a Final Project Report is due within 30 days of the end of the project.

<b>Work to be accomplished / Outcome*</b>	<b>Work Days*</b> (refers to the number of days it will take to complete task, not the names of the days of the week)	<b>Start Date*</b> (mm/dd/yyyy)	<b>Completion Date*</b> (mm/dd/yyyy)



# Budget Form

## Sample Ohio History Fund Application For Reference Only

The Ohio History Fund shares these worksheets so that you can review them prior to logging into the Fund's online grant application system.

The Budget Form consists of:

- 1) **Budget Spreadsheet** - completed spreadsheet required of ALL applicants
- 2) **Construction Budget Spreadsheet** - required only for Bricks & Mortar applicants, in addition to a completed Budget Spreadsheet.
- 3) **Budget Spreadsheet Terms Defined**
- 4) **Budget Category Descriptions**

The online Budget Form is an Excel Spreadsheet. Find it at: [www.ohiohistory.org/historyfund](http://www.ohiohistory.org/historyfund) > "Apply for a Grant"

Click on the tabs at the bottom of the Budget Spreadsheet to navigate among individual worksheets and see definitions and descriptions of terms used.

**Reminder:** the History Fund only accepts applications submitted through the program's online grant application system. *No paper applications or Budget Spreadsheets are accepted.*

**Budget Spreadsheet - History Fund**

**Grant Project Title:**

**Applicant Organization:**

**NOTE:** Items marked with an **asterisk (\*)** are required. Your budget must include the time and cost or match for a **Project Director** and a **Project Bookkeeper** - even if they are volunteers. Applications whose budgets that do not include a Project Director or Bookkeeper will not be considered.

The **Construction Budget Spreadsheet** (the second tab) is required only for projects in the Brick & Mortar category.

Click on the tabs below, **Budget Terms Defined** and **Budget Categories Described**, for the meanings of terms used in this spreadsheet.

Budget Category	Budget Item (specify)* (text)	Units* (number)	Rate / Unit* (number)	Total Cost*	History Fund Grant Request* How much of the Total Cost line item do you want the grant to pay for?	Match* How much of the Total Cost of line item will you match?	Source of Match*	Kind of Match*	Match Pending (P) or Confirmed (C)?*
<b>PERSONNEL</b>									
Project director*				\$ -	\$ -	\$ -			
Project bookkeeper*				\$ -	\$ -	\$ -			
Other paid staff of applicant organization				\$ -	\$ -	\$ -			
				\$ -	\$ -	\$ -			
				\$ -	\$ -	\$ -			
				\$ -	\$ -	\$ -			
Volunteers				\$ -	\$ -	\$ -			
				\$ -	\$ -	\$ -			
				\$ -	\$ -	\$ -			
				\$ -	\$ -	\$ -			
Professional Services				\$ -	\$ -	\$ -			
				\$ -	\$ -	\$ -			
				\$ -	\$ -	\$ -			
				\$ -	\$ -	\$ -			
subtotal			\$ -	\$ -	\$ -				
<b>MATERIALS &amp; SUPPLIES</b> Note: for Bricks & Mortar Projects, complete the Construction Budget Form. Do not itemize material and supplies for Bricks & Mortar projects in this section									
				\$ -	\$ -	\$ -			
				\$ -	\$ -	\$ -			
				\$ -	\$ -	\$ -			
				\$ -	\$ -	\$ -			
				\$ -	\$ -	\$ -			
				\$ -	\$ -	\$ -			
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				\$ -	\$ -	\$ -			
				\$ -	\$ -	\$ -			
				\$ -	\$ -	\$ -			
				\$ -	\$ -	\$ -			
subtotal				\$ -	\$ -	\$ -			
<b>EQUIPMENT</b>									
				\$ -	\$ -	\$ -			
				\$ -	\$ -	\$ -			
				\$ -	\$ -	\$ -			
				\$ -	\$ -	\$ -			
				\$ -	\$ -	\$ -			
subtotal				\$ -	\$ -	\$ -			

MARKETING & PROMOTION				\$ -	\$ -	\$ -			
				\$ -	\$ -	\$ -			
				\$ -	\$ -	\$ -			
				\$ -	\$ -	\$ -			
				\$ -	\$ -	\$ -			
<i>subtotal</i>				\$ -	\$ -	\$ -			
PRINTING & PUBLICATION				\$ -	\$ -	\$ -			
				\$ -	\$ -	\$ -			
				\$ -	\$ -	\$ -			
				\$ -	\$ -	\$ -			
				\$ -	\$ -	\$ -			
<i>subtotal</i>				\$ -	\$ -	\$ -			
PROFESSIONAL DEVELOPMENT				\$ -	\$ -	\$ -			
				\$ -	\$ -	\$ -			
				\$ -	\$ -	\$ -			
				\$ -	\$ -	\$ -			
				\$ -	\$ -	\$ -			
<i>subtotal</i>				\$ -	\$ -	\$ -			
TRAVEL				\$ -	\$ -	\$ -			
				\$ -	\$ -	\$ -			
				\$ -	\$ -	\$ -			
				\$ -	\$ -	\$ -			
				\$ -	\$ -	\$ -			
<i>subtotal</i>				\$ -	\$ -	\$ -			
Construction Budget subtotal (for Bricks & Mortar category only)				\$ -	\$ -	\$ -			
<b>Total Project Cost</b>				\$ -	\$ -	\$ -			

When finalized, enter **Total Cost** total above in **Total Project Cost** field in "Grant Project Data" section of application.

When finalized, enter **History Fund Grant Request** total above in **Grant Request** field in "Grant Project Data" section of application.

When finalized, enter **Match** total above in **Match** field in "Grant Project Data" section of grant

**Construction Budget Spreadsheet - History Fund**

**Grant Project Title:**

**Applicant Organization:**

<b>Construction Budget Categories</b>	<b>Total*</b>	<b>History Fund Grant Request*</b> How much of the Total Cost line item do you want the grant to pay for?	<b>Match*</b> How much of the Total Cost of line item will you match?	<b>Source of Match*</b>	<b>*Kind of Match</b>	<b>Match Pending (P) or Confirmed (C)?*</b>
<b>General Conditions</b> (includes start-up costs, scaffolding, project sign)	\$ -	\$ -	\$ -			
<b>Site Work</b> (subsurface investigation, demolition, drainage, underpinning)	\$ -	\$ -	\$ -			
<b>Concrete</b> (poured in place concrete, precast concrete, concrete restoration and cleaning)	\$ -	\$ -	\$ -			
<b>Masonry</b> (mortar, unit masonry, stone, masonry restoration and cleaning)	\$ -	\$ -	\$ -			
<b>Metals</b> (structural metal framing, metal finishes and restoration)	\$ -	\$ -	\$ -			
<b>Wood &amp; Plastics</b> (rough carpentry, finish carpentry, architectural woodwork, millwork)	\$ -	\$ -	\$ -			
<b>Thermal/Moisture</b> (waterproofing, damp proofing, insulation, roofing, flashings)	\$ -	\$ -	\$ -			
<b>Doors &amp; Windows</b> (doors and frames, entrances and storefronts, window repair and restoration, window replacement, hardware)	\$ -	\$ -	\$ -			
<b>Finishes</b> (lath and plaster, gypsum wallboard, ceramic tile, wood, brick, and stone flooring, painting)	\$ -	\$ -	\$ -			
<b>Specialities</b> (fire extinguishers and cabinets)	\$ -	\$ -	\$ -			
<b>Special Construction</b> (solar and wind energy systems)	\$ -	\$ -	\$ -			
<b>Conveying Systems</b> (elevators)	\$ -	\$ -	\$ -			
<b>Mechanical/Electrical</b> (plumbing, fire protection, heating, cooling, air distribution); electrical service and distribution; lighting)	\$ -	\$ -	\$ -			
<b>Other</b> , please specify:	\$ -	\$ -	\$ -			
<b>Construction Subtotal</b>	\$ -	\$ -	\$ -			

## BUDGET SPREADSHEET TERMS DEFINED

See examples in "Sample Budget Spreadsheet" at [www.ohiohistory.org/historyfund](http://www.ohiohistory.org/historyfund) > "Apply for a Grant" > "Application Related Resources"

**Budget Category:** the History Fund's classification of grant expenses. No information needed from you in this column. For a description of each category, see "Budget Categories Described" tab.

**Budget Item:** the people and "things" you need to complete the project you described in your grant narrative.

**Units:** the number of "things" you need to accomplish the project. Examples: hours it will take the project director to manage a project, quantities of materials required, number of miles to be travelled.

**Rate / unit:** how much does each Unit cost? Examples: for personnel, the cost is the person's hourly wage or daily or weekly rate. For materials, it's the cost per item. For travel, it's the cost per mile.

**Total Cost:** number of Units X Rate / unit

**History Fund Grant Request:** of the Total Cost, how much do you want your History Fund grant to pay for?

**Match:** how much of the Total Cost will you, as the applicant, pay for – either from cash, donated materials/equipment, and/or services?

**NOTE:** For each line item in the budget, the sum of the History Fund Grant Request + Match must = Total Cost.

### Match Requirements:

- **Bricks & Mortar** projects and **Programs & Collections** projects: minimum 40% Match of Total Project Cost is required. Match *can* exceed 40%, but *cannot* be below 40%.
- **Organizational Development** projects: minimum of 20% Match of Total Project Cost is required. Match *can* exceed 20%, but *cannot* be below 20%.
- *Applications that do not meet Match minimums will not be considered.*

**Source of Match:** who is contributing the match? Examples: the applicant in the form of staff and/or volunteer time, a local business (name?), another grant maker?

**Kind of Match:** briefly describe the match. Examples: is the match is paid staff time, time donated by volunteers, donated goods and service, other grants?

**Match Pending (P) or Confirmed (C)?:** does your organization have the match in hand as of the time of the application deadline or not? If you have the match in hand, it's confirmed. If you don't, it's pending. If a match amount is pending, explain in your grant narrative what you'll do if the pending match does not materialize.

**NOTE:** Secure most of the matching support for your project prior to submitting the application (if not all). Applications that show most matching support "confirmed" compete better against applications that show matches "pending."

## BUDGET CATEGORY DESCRIPTIONS

There are seven overarching budget categories on the Budget Spreadsheet:

1. PERSONNEL
2. MATERIALS & SUPPLIES
3. EQUIPMENT
4. MARKETING & PROMOTION
5. PRINTING & PUBLICATION
6. PROFESSIONAL DEVELOPMENT
7. TRAVEL

Not all budget categories will apply to all grants.

Certain costs are ineligible under History Fund rules. For a list of ineligible costs, see *the Ohio History Fund Guidelines*, section titled "What kinds of costs are ineligible for History Fund grant assistance?"

### PERSONNEL

List by name and title the paid staff and volunteers whose time will be charged to the project. Calculate the cost of their time, (hourly rate), distribute the costs between the History Fund and Match share columns.

#### **Project Director – Project Bookkeeper – Other Paid Staff of Applicant Organization**

Budgets must include the time and cost of a project director and project bookkeeper, *even if they are volunteers*. ***Applications which do not account for these two necessary positions will not be considered.*** The History Fund needs to know that a grant project will have a director – someone responsible for the successful completion of the project – and someone who will keep the project's financial records – a Project Bookkeeper.

The costs of a Project Director and Bookkeeper may be accounted for as match (and usually are), may be paid from grant funds, or may be a combination of match and grant funds if the staff member in question is paid by the organization and not a volunteer.

#### **Volunteers**

The time volunteers devote to a project is an important source of matching funds. You must record the monetary value volunteer time in the Match column of the budget spreadsheet. Volunteer time is to be calculated at no less than the minimum wage of the Ohio History Connection, which is **\$15.00 per hour**.

Exceptions: If a volunteer is doing work for which they are or were paid, you are welcome to charge their paid rate. Examples: a retired CPA serving as project bookkeeper, former educator serving as the project director of a school program, a librarian volunteering as project director for an archives project.

If you want to cite a rate higher than the \$15.00 per hour wage above, contact the Ohio History Fund for prior approval. Indicate History Fund approval in the Budget Narrative.

#### **Professional Services**

Grant projects may hire the services of outside consultants or contractors. List each service

provider in Professional Services on the Budget Spreadsheet. Include a computation for consultant costs and distribute them between the History Fund and the matching share columns as appropriate.

**NOTE:** Cost-plus contracts (for example: “\$500 / day plus per diem”) must include a not-to-exceed amount.

Examples of professional services a project may require:

- Collections management
- Architectural history
- Digitization
- History
- Archaeology
- Exhibit design
- Research
- Marketing and promotion
- Special event planning and oversight

Bricks & Mortar projects may require construction services, subdivided into areas such as:

- Architectural services
- Construction
- Engineering

### **MATERIALS & SUPPLIES**

Materials & Supplies refers to the “stuff,” that will be used up to complete the project. Donated services and materials are allowable as match when they directly benefit the project and are specifically identified.

Materials & Supplies can be subdivided into these categories:

- Audio-visual supplies
- Collection supplies
- Educational materials & supplies (used for programs)
- Exhibit supplies
- Hardware supplies
- Office supplies
- Other supplies. This is a catch-all category for items that do not fit into any of the other categories above. Explain in the budget narrative field the supplies listed in this category.
- Postage

It is not necessary to account for every screw, sticky note, or computer flash drive in your project’s budget. It is necessary to show that you have thought through what you need to accomplish the project and that you have budgeted for it.

### **EQUIPMENT**

Equipment includes the tools you will use to accomplish the project. Under equipment, list items that you will purchase with grant funds and use during the project’s duration, and which will remain with your organization to sustain the project after the grant ends. Examples include digital audio recorders for an oral history project, computers for a collections management project, or archival shelving for a collections storage project. Make sure the project narrative includes clear, compelling explanations for any equipment

purchases in the budget.

Equipment can be subdivided into these categories:

- Audio-visual equipment
- Computer hardware
- Computer software
- Storage and display furniture
- Other equipment. This is a catch-all category for items that do not fit into any of the other categories above. Explain in the Budget Narrative field the equipment listed in this category

**NOTE:** You must document materials & supplies and equipment that are donated to your project, if any, just as you must document volunteer time.

### **MARKETING & PROMOTION**

Telling your community and stakeholders about your project is important. If the success of your project relies on public participation, documenting the monetary value of marketing and promotion efforts is essential.

Categories include but are not limited to:

- Broadcast advertising – radio, television
- Internet advertising – Facebook ads, Google Ads, Web advertisements
- Print advertising – newspapers, newsletter, magazines
- Printed materials – postcards, flyers, posters, invitations

**NOTE:** History Fund grant recipients are required to acknowledge the History Fund in writing and include the logo of the Ohio History Connection on all project signage, news releases, and program materials. The History Fund and the Ohio History Connection must be acknowledged verbally at all grant-related events. Recommended wording will be provided. **The cost of signage to acknowledge History Fund support may be counted as Match in the project's budget.**

### **PRINTING & PUBLICATIONS**

Examples of expenses for Printing & Publications include photocopying handouts for grant supported activities, printing booklets or publication of books, and the design of these items. It also includes web-based design and publication expenses.

Categories include (but are not limited to):

- Design and layout
- Photocopying
- Printing
- Photography

### **PROFESSIONAL DEVELOPMENT**

Professional Development includes conference and workshop fees, the cost of training done “in house” by an outside expert, membership dues, or other fees. This category will apply to many Organizational Development projects.

### **TRAVEL**

Travel encompasses mileage and accommodations for grant project personnel. If travel is to be paid with either in whole or in part with grant funds, the *Travel Policy and Procedures* of

the Ohio History Connection will apply:

- Travel by car is reimbursed at \$0.585 per mile.
- Lodging may be booked if the traveler is more than 45 miles from office or and is to be made at a business class hotel (for example, Hampton Inn, Marriott Courtyard, or Holiday Inn Express).
- Meals will be reimbursed only in conjunction with overnight stays.
- The per diem rate is \$35 per day, including gratuity and taxes.
- Airfare will be reimbursed at coach rates.

If travel costs will be paid with Match, the applicant organization's travel policy will apply.

Contact the History Fund for more information if travel expenses are a part of your grant.

# Signatures of Authorization Form

## Sample History Fund Application

### For Reference Only

The History Fund shares these worksheets so that you can review them prior to logging into the Fund's online grant application system.

The online Signatures of Authorization Form is an MS Word document. Find it at:  
[www.ohiohistory.org/historyfund](http://www.ohiohistory.org/historyfund) > "Apply for a Grant"

***Reminder:*** the History Fund only accepts applications submitted through the program's online grant application system. *No paper applications or Signatures of Authorization Forms are accepted.*

# SIGNATURES OF AUTHORIZATION

## Ohio History Fund Grant Application

Ohio History Connection

**Grant Project Title:** \_\_\_\_\_

**Applicant Organization:** \_\_\_\_\_

As the grant project's Authorizing Official, Project Director, and Project Bookkeeper, we certify the following:

- All information in the application is accurate to the best of our knowledge and we can, if requested, provide proof of same.
- We and our subordinates will execute the project and expend all project funds as described in the application, or in modifications to subsequent agreements, describing the project and can, if requested, demonstrate same.
  - Furthermore, if awarded a grant, we will return to the Ohio History Connection a signed grant agreement and associated forms no later than 30 days following receipt of the grant agreement and forms. Noncompliance will result in forfeiture of the grant.
- The project adheres to all requirements for the History Fund as described in the *History Fund Grant Guidelines*

\_\_\_\_\_  
**Signature of applicant organization's  
Authorizing Official**

\_\_\_\_\_  
**Printed Name**

\_\_\_\_\_  
**Date**

\_\_\_\_\_  
**Signature of Project Director**

\_\_\_\_\_  
**Printed Name**

\_\_\_\_\_  
**Date**

\_\_\_\_\_  
**Signature of Project Bookkeeper**

\_\_\_\_\_  
**Printed Name**

\_\_\_\_\_  
**Date**

Upload and attach this form, with signatures, to your online History Fund grant application in the section titled "Signatures."