



# History Fund Grant Guidelines

## *Ohio Historical Society*

These guidelines describe the History Fund grant program, explain what it will fund, and outline the grant review process. The application and instructions for completing the application can be found at: [www.ohiohistory.org/historyfund](http://www.ohiohistory.org/historyfund).

The Ohio Historical Society (OHS) wishes to thank our colleagues from these organizations, who serve on the Society's History Fund Advisory Committee:

- Heritage Ohio
- Preservation Ohio
- Ohio Archeological Council
- Ohio Arts Council
- Ohio Genealogical Society
- Ohio Historical Records Advisory Board
- Ohio Humanities Council
- Ohio Local History Alliance
  - Bremen Area Historical Society
  - Summit County Historical Society
  - Wood County Historical Center & Museum
- Society of Ohio Archivists

### ***What is the History Fund?***

The History Fund (Fund) was created to support the preservation and sharing of Ohio's heritage by funding local, regional, and statewide projects, programs, and events related to the broad sweep of the state's history and pre-history.

The History Fund is made possible by the voluntary contributions of individual Ohioans, who donate a portion of their Ohio income tax refund or donate directly to OHS. The number and size of grants will vary according to the amount donated.

OHS will issue an annual report, accounting for how all History Funds were applied. The report will include a list of grant recipients, descriptions of their projects, and grant amounts.

### ***What is the Ohio Historical Society?***

The Ohio Historical Society developed and administers the History Fund. *Our mission is to spark discovery of Ohio's history. Help people connect with Ohio's past in order to understand the present and create a better future.* As a private nonprofit organization headquartered in Columbus, we preserve, care for, interpret, and present Ohio's cultural heritage. OHS operates

the state's history museum in Columbus, the state historic preservation office, the state archives, and an extensive system of historic sites around Ohio. We also provide extensive support for local history initiatives, statewide collections digitization, K-12 social studies education, and other history efforts of our partners and constituents.

## ***What are the goals of the History Fund?***

The History Fund seeks projects that will achieve the following:

### **Be Objective and Fair**

Grants will support projects that enrich our understanding of the context in which people, places, things, or events functioned historically. Projects using grant funds will not advocate a partisan political, social, or cultural agenda. The portrayal of the past must be based on thorough research based in credible sources. No grants will fund any project that discriminates against persons or groups.

### **Strengthen Ohio History**

Projects must include illumination, conservation, or perpetuation of Ohio's history, including historical persons, places, things, or events.

### **Demonstrate Community Support**

Community support is demonstrated through cash and in-kind support for the project. All History Fund grants must be matched. See each grant category's specific guidelines in this document for match requirements. Projects that include a higher cash match or exceed the minimum required match will be given preference in the review process. Note that work or expenditures begun before the grant period commences are not eligible match activities or grant expenditures.

### **Public Benefit**

Applications must explain how History Fund projects will benefit their communities, including advanced understanding/appreciation for Ohio's history and community or economic development. All History Fund projects must be undertaken without regard to race, creed, sex, national origin, age, or disability.

### **Demonstrate a Measureable Impact**

History Fund projects will have an effect on their organizations or communities that can be measured and, thus, demonstrated. Demonstration of effect can be measured qualitatively, quantitatively, and visually. Applications must include a clear explanation of how the effectiveness of the project will be measured in the project's final report. Using these measures, a final report will explain the extent to which a project was effective.

### **Foster Sustainability**

History Fund grants will support projects that recipients can sustain after the grant ends or that advance an organization's sustainability. For example, if the purchase of museum collection management software is contemplated, what are the applicant's plans to train people to use the software and maintain the collections management system after the grant ends? For a public program of limited duration, how will hosting the program help the organization reach its long-term goals? For a building rehabilitation project, what resources will the organization dedicate to operate the building and to uphold a maintenance agreement?

## Meet Applicable Professional Standards

It is expected that the applicant organization will have or will obtain the requisite professional expertise to carry out the proposed project. Projects will adhere to or help the organization to meet accepted professional standards. Currently, standards govern the practice of history in these areas:

- **Archaeology:**
  - Secretary of the Interior's Standards and Guidelines for Archeology and Historic Preservation; [http://www.cr.nps.gov/local-law/arch\\_stnds\\_0.htm](http://www.cr.nps.gov/local-law/arch_stnds_0.htm)
  - Society for American Archaeology's Principles of Archaeological Ethics; <http://www.saa.org/AbouttheSociety/PrinciplesofArchaeologicalEthics/tabid/203/Default.aspx>
- **Archives:** Society of American Archivists; <http://www2.archivists.org/standards>
- **Collections:**
  - American Institute for Conservation of Historic and Artistic Works – “Codes of Ethics and Guidelines for Practice;” <http://www.conservation-us.org/index.cfm?fuseaction=page.viewPage&pageID=858&nodeID=1>
  - “Caring for Your Treasures;” <http://www.conservation-us.org/index.cfm?fuseaction=Page.ViewPage&PageID=497>
  - National Park Service “NPS Museum Handbook, Part I: Museum Collections;” <http://www.nps.gov/history/museum/publications/MHI/mushbkI.html>
- **Digitization:** IMLS/NISO Framework for Building Good Digital Collections; <http://framework.niso.org>
- **Genealogy:** Board Certification for Genealogists and the BCG Genealogical Standards Manual; <http://www.bcgcertification.org/resources/standard.html>
- **Historical Societies and Museums:** Standards and Excellence Program (StEPs) of the American Association for State and Local History; <http://www.aaslh.org/steps.htm>
- **Historic Preservation:** Secretary of the Interior's Standards and Guidelines for Archeology and Historic Preservation; [http://www.cr.nps.gov/local-law/arch\\_stnds\\_0.htm](http://www.cr.nps.gov/local-law/arch_stnds_0.htm)
- **History Scholarship:** American Historical Association's Statement on Standards of Professional Conduct; <http://www.historians.org/pubs/Free/ProfessionalStandards.cfm>
- **Museums:** American Association of Museums, Characteristics of Excellence for U.S. Museums; <http://www.aam-us.org/aboutmuseums/standards/upload/Characteristics-of-Excellence-reg-and-pe.pdf>
- **Oral History:** Oral History Association, Principals and Best Practices; <http://www.oralhistory.org/do-oral-history/principles-and-practices/>

## ***Who is eligible to apply?***

- Ohio-based, nonprofit organizations in good standing
- Public entities in Ohio, such as units of local government, public libraries, and educational institutions
- Organizations operating Ohio Historical Society sites under “site management agreements” are eligible to apply under their own names. Functions and fiscal responsibilities assigned to OHS under site management agreements are not eligible for grants from the History Fund.
- Ineligible applicants include for-profit businesses and entities, private individuals, and the Ohio Historical Society.
  - Ineligible applicants may serve as contractors to grant awardees but are not eligible to apply for History Fund grants directly.
- Examples of eligible applicants include, but are not limited to local historical societies, public libraries, genealogical societies, university archives and special collections, historic preservation groups, archeological societies, county records management offices, and incorporated “friends” groups of any of the above.

## ***What activities are eligible for funding?***

History Fund grants will support projects in three categories: Organizational Development, Programs & Collections, and Bricks & Mortar. The examples given below are not all inclusive, but illustrate the types of projects eligible in each category.

### **Organizational Development**

Organizational Development grants focus on building capacity: providing the training and materials to help historical societies and like organizations help themselves. Grants in this category can include, but are not limited to, training for board and staff, professional assistance with organizational issues, improving governance structures, volunteer or membership program development, and assessments or strategic plans (including paid facilitators/consultants). Applications must explain the issue(s) faced by the organization and how the grant will address the issue(s). Solutions must align to the issues identified.

#### *Requirements:*

- Grant Minimum: \$1,000
- Grant Maximum: \$4,000
- Project Length: 1 year
- Match Requirement: 80/20. The grant will pay 80% of the total cost of a project and the applicant will be responsible for a 20% match. Example: for a \$1,000 project, the History Fund grant would provide up to \$800 and applicant’s match would be \$200.

- Funds Distribution: 50% of the grant amount at the beginning of the project. Remainder paid upon completion of the project, pending approval of the final report.

## **Programs & Collections**

Programs & Collections encompasses a variety of projects that further the study, recordation, interpretation, publication and dissemination of historical information, engagement of communities in history, or conservation of historical collections and archives.

Projects that can be funded under this category could include, but are not limited to, public programs, exhibits, care and management of archival materials and artifacts, digitization of collections, oral history, archeological/architectural/historical surveys, archaeological field work, nominations of historic buildings and sites to the National Register of Historic Places, preparation of historic preservation plans or feasibility studies, mobile or online applications, walking tours, and events.

### *Requirements:*

- Grant Minimum: \$2,000
- Grant Maximum: \$20,000
- Project Length: 2 years
- Match Requirement: 60/40. The grant will pay 60% of the total cost of a project and the applicant will be responsible for a 40% match. Example: for a \$10,000 project, the History Fund would provide \$6,000. The applicant's match would be \$4,000.
- Funds Distribution: 50% of the grant amount at the beginning of the project. Remainder paid upon completion of the project, pending approval of the final report.

## **Bricks & Mortar**

Bricks and mortar projects can involve the following:

- Rehabilitation, restoration, protection, or acquisition of historic properties and archaeological sites listed on the National Register of Historic Places or designated by local ordinance.
- Building work related to the preservation of historical or archival collections regardless of the building's historic status.
- New construction dedicated to the preservation of historical or archival collections.

### *Requirements:*

- Grant Minimum: \$2,000
- Grant Maximum: \$20,000
- Project Length: up to 2 years
- Match Requirement: 60/40. The grant will pay 60% of the total cost of a project and the applicant will be responsible for a 40% match. Example: for a \$10,000 project, the History Fund would provide \$6,000. The applicant's match would be \$4,000.

- Funds Distribution: 20% of grant paid at the beginning of the project. Remainder paid over life the grant on a reimbursement basis only.
- Bricks and Mortar projects will require a maintenance agreement under which the property owner agrees to maintain the historic features of the property (for historic properties), or retain the building for its intended use (for non-historic) for a period of five years.

## ***What kinds of costs are ineligible for History Fund grant assistance?***

- Acquisition of historical materials for an institution's collection.
- Buildings – moving or reconstructing: Cost of moving historic buildings, generally. (Contact the Ohio Historical Society if you are contemplating such a project.) Cost of reconstructing historic buildings.
- Buildings – remodeling: Projects to remodel or modernize building interiors unrelated to the guidelines above. For example, general maintenance and redecorating are not eligible.
- Copyright: Projects that would convert to a digital format materials that the applicant intuition does not hold the copyright to. Materials must no longer be restricted by copyright, the applicant must hold copyright, or the applicant must document that copyright has been turned over to the organization or ceded to the public domain.
- Costs of operation, such as utilities, security system maintenance fees, grounds keeping hosting services for website, digital image storage, etc.
- Public works of art, including monuments, sculptures, and murals, that do not address Ohio history and the goals of the History Fund (see above section).
- Equipment: Purchase of equipment not related to accomplishing a specific project goal.
- Historical markers: Grants to erect or repair Ohio Historical Markers. For grants for markers, see [www.remarkableohio.org](http://www.remarkableohio.org).
- *Honoraria when the primary intent is to confer distinction.*
- Insurance costs, unless shown as match for an event or program.
- Interest and debt payments.
- Direct lobbying or fundraising.
- Mitigation costs (under Section 106 of the National Historic Preservation Act).
- Oral history that does not focus on a particular subject or theme.)
- Other activities: the list above is not comprehensive. Contact the Ohio Historical Society if you have a question about whether an activity is eligible for funding.

## ***How are grant applications and project reports reviewed?***

- Applications will be reviewed by and recommendations for funding made by a panel of professionals who represent the grant program's constituencies (local historians, historic preservationists, museum professionals, archeologists, archivists, genealogists, etc). No member of the committee will be a member of the staff of the Ohio Historical Society. OHS staff will review applications for eligibility for the program and prepare applications for review by the panel.
- Panel members will be appointed annually by the Ohio Historical Society's executive director and will be publically announced.
- Review meetings will be open to the public.
- Projects will be scored according to rubric based on the criteria outlined above in "What are the Goals of the History Fund" and "What Activities are Eligible for Funding." The highest scoring projects will be recommended to OHS's director for funding. Projects may receive full or partial funding.
- Final funding decisions will be made by the executive director of the Ohio Historical Society.
- After the project is complete, a grant recipient will submit a final report. The final report will describe how the project accomplished its goals and explain how the applicant expended grant funds. Acceptance of the report is at the discretion of program staff and is required for the final payout of the grant.