



# Ohio History Fund Grant Guidelines

These guidelines describe the Ohio History Fund grant program, explain what it will fund, and outline the grant review process. Find the grant application, application submission deadline, and related information at: [www.ohiohistory.org/historyfund](http://www.ohiohistory.org/historyfund).

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

The Ohio History Connection created the Ohio History Fund competitive matching grant program to address a tremendous need for funding for local, regional, and statewide projects, programs, and events that preserve and share our state's history. Since the History Fund began in 2012, it has received nearly 500 applications totaling over \$5 million in grant requests.

The Ohio History Fund is made possible mainly by the voluntary contributions of individual Ohioans, who donate portions of their Ohio income tax refunds, purchase Ohio History "mastodon" license plates, and give directly to the Ohio History Connection. The number and size of grants varies annually according to amounts donated during the previous year.

## ***What is the Ohio History Connection?***

The Ohio History Connection, a private, nonprofit corporation, operates the state's history museum in Columbus, the State Historic Preservation Office, the state archives, and an extensive system of sites around Ohio. We also provide support for local history initiatives, digitization of historical materials, K-12 social studies education, and the efforts of our partners and stakeholders to save and share Ohio's history.

Our mission is to **spark discovery of Ohio's stories. Embrace the present, share the past and transform the future.** We strive to manifest the following **core values** and **strategic priorities**:

### **Core Values:**

1. **Relevance** - Addressing and communicating the significance of history with Ohio's diverse people
2. **Authenticity** - Valuing artifacts and true stories of history
3. **Inclusivity** - Appealing to all Ohioans, especially underserved audiences
4. **Stewardship** - Protecting the evidence of Ohio history
5. **Working Together** - Pursuing teamwork and sharing authority and responsibility

### **Strategic Priorities:**

1. **Sustainability** – The Ohio History Connection is moving towards a diversified funding model and becoming a more environmentally sustainable.

2. **Equity** – The Ohio History Connection strives to tell a more robust and representational history of Ohio, to ensure our impact crosses demographic lines and supports the learning, vision, and imagination of all stakeholders.
3. **Relationship Building** – The Ohio History Connection is building meaningful partnerships to allow us to accomplish work we could not achieve on our own. Direct funding through the Ohio History Fund helps us build relationships with recipients to achieve our shared missions of behalf of all who call Ohio home.

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

The History Fund seeks projects that will help the Ohio History Connection realize its core values and accomplish the following:

### **Strengthen Ohio History**

Projects must achieve the mission of the applicant organization as well as that of the Ohio History Connection. This includes supporting projects that preserve and share histories of all peoples, past and present, who lived in what we now call Ohio. It also means recognizing that some communities have been excluded from, misinterpreted, or underrepresented in the historical record. We strive for equity in understanding and sharing the past accurately and fairly. Strengthening Ohio History means *all* histories of Ohio, from the local level on up.

### **Public Benefit & Relationship Building**

Applicants must explain how History Fund projects will benefit their communities and result in projects that strengthen relationships within and among groups. How will your project make your part of the world a better place? History Fund-supported programs must be open to all, without regard to race, creed, sex, national origin, age, or disability. No grant will support a project that discriminates against persons or groups or that advocates a partisan agenda.

### **Matching Support**

A History Fund grant is the Ohio History Connection's investment in your project and organization. We need you to show you investing in your project, too. Matching support is demonstrated through cash and in-kind support. All History Fund grants must be matched. See each grant category's guidelines below for match requirements. Work or expenditures initiated before your project's start date are not eligible as match for a grant.

### **Measureable Impact**

History Fund-supported projects must demonstrate that they achieved their goals and made a measurable impact on their communities. Demonstration of impacts can be measured qualitatively and quantitatively. A grant applicant must explain how they will measure the impact of their project. Using these measures, the grant project's final report will describe the project's impact (so far as it is known at the end of the project period).

### **Sustainability**

In line with the Strategic Initiatives above, History Fund grants can help applicants diversify their revenue streams and support environmentally sustainable projects. The History Fund also

strives to support projects that recipients can sustain after the grant ends. For example, if a local history museum wants a grant to purchase collection management software, what is the plan to train people to use the software and maintain the 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 continue to preserve the building?

### **Apply Professional Standards & Best Practices**

The History Fund expects that the applicant organization will have or will obtain the requisite professional expertise to carry out the project. Applicants will adhere to and apply accepted professional standards and best practices below to their projects.

Projects related to **American Indian** cultures: Ohio History Connection’s *Guidelines on American Indian Relations*, at <https://www.ohiohistory.org/research/american-indian-research-resources/>.

- If you are planning a project related to American Indian cultures in Ohio, contact the History Fund **as early as possible** to discuss your project as you will need time to secure support for the proposal from the History Fund and the Ohio History Connection’s Division of American Indian Relations prior to submission of the application.

#### **Archaeology:**

- Society for American Archaeology’s Principles of Archaeological Ethics: <http://www.saa.org/AbouttheSociety/PrinciplesofArchaeologicalEthics/tabid/203/Default.aspx>
- Ohio Archaeological Council – Code of Ethics: <https://ohioarchaeology.org/what-we-do/organizational-policies-procedures/code-of-ethics.html>
- *Archeology Guidelines* of the State Historic Preservation Office, at <https://www.ohiohistory.org/preserving-ohio/survey-inventory/archaeology-survey>.
- Permits and written permission are required to conduct archaeological investigations on land not owned by the grant applicant. For details, go to <https://www.ohiohistory.org/preserving-ohio/survey-inventory/archaeology-survey>.

**Archives:** Society of American Archivists: <http://www2.archivists.org/standards>

#### **Collections:**

- American Institute for Conservation of Historic and Artistic Works, <https://www.culturalheritage.org/>. Specifically:
  - “AIC Wiki...Preventative Care” at [https://www.conservation-wiki.com/wiki/Preventive\\_Care](https://www.conservation-wiki.com/wiki/Preventive_Care)

- “Caring for Your Treasures”: <https://www.culturalheritage.org/about-conservation/caring-for-your-treasures>
- National Park Service “NPS Museum Handbook, Part I: Museum Collections;” <http://www.nps.gov/museum/publications/MHI/mushbkl.html>

#### **Digitization:**

- Federal Agencies Digital Guidelines Initiative (FADGI): <http://www.digitizationguidelines.gov/guidelines/>
- NISO Framework for Building Good Digital Collections: <https://www.niso.org/publications/framework-guidance-building-good-digital-collections>.
  - FADGI standards are more recent and are preferred, but the older NISO Framework standards are also acceptable

**Genealogy:** Board Certification for Genealogists (BCG): Ethics & Standards: <https://bcgcertification.org/ethics-standards/> and *Genealogy Standards*, second edition revised (2021): <https://bcgcertification.org/product/genealogy-standards-2d-edition/>

**Historical Societies and Museums:** Standards and Excellence Program (StEPs) of the American Association for State and Local History: <https://aaslh.org/programs/steps/> (to access directly, must enroll in the fee-based StEPs program)

**Historic Preservation:** depending on the project, different standards, best practices, and guidelines apply and are listed below. If standards for your type of preservation project are not listed, contact the Ohio History Fund.

- ***Architectural / Historical Surveys:*** *Guidelines for Conducting History/Architecture Surveys in Ohio*, at <https://www.ohiohistory.org/preserving-ohio/survey-inventory/ohio-historic-inventory/>
- ***Bricks & Mortar projects:*** Secretary of the Interior’s Standards for Rehabilitation: <https://www.nps.gov/articles/000/treatment-standards-rehabilitation.htm> (depending on the project, however, the Standards for Restoration or others may apply instead. See: <https://www.nps.gov/orgs/1739/secretary-standards-treatment-historic-properties.htm>.)
- ***Historic Structures Reports:*** *Preservation Brief 43, The Preparation and Use of Historic Structure Reports:* <https://www.nps.gov/orgs/1739/upload/preservation-brief-43-historic-structure-reports.pdf>
- ***National Register of Historic Places*** nomination projects: Prior to applying for a History Fund grant, applicants must complete and receive a response to a *National Register Preliminary Questionnaire*, to determine whether a property or district is likely to qualify for nomination. For details, visit: <https://www.ohiohistory.org/preserve/state-historic-preservation-office/nationalregister/nrfirststeps>

- Guideline for the **Ohio Landscape Inventory** are at:  
<https://www.ohiohistory.org/preserving-ohio/survey-inventory/ohio-landscape-inventory/>
- Guidelines for the **Ohio Shipwreck Inventory** are at:  
<https://www.ohiohistory.org/preserving-ohio/survey-inventory/ohio-shipwreck-inventory/>

The National Park Service's **Preservation Briefs** series spells out best practices for a variety of projects, including painting, roof, masonry, window repairs, and HVAC for historic buildings. Consult appropriate Briefs as you plan your project:

<https://www.nps.gov/orgs/1739/preservation-briefs.htm>

**Historical Scholarship:** American Historical Association's Statement on Standards of Professional Conduct: <http://www.historians.org/pubs/Free/ProfessionalStandards.cfm>

**Museums:** American Association of Museums, Ethics, Standards, and Professional Practices: <https://www.aam-us.org/programs/ethics-standards-and-professional-practices/core-standards-for-museums/>

#### **Nonprofit Organizations**

- Ohio Association of Nonprofit Organizations, An Ethics and Accountability Code for the Nonprofit Sector: <https://www.oano.org/standards-for-excellence/complete-standards/>
- Ohio Attorney General, Resources for Charities: [Avoiding Theft / Protecting the Integrity of Your Nonprofit](#) and [Guide for Charity Board Members](#)

**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, as defined by the Ohio Secretary of State's Office.
- Public entities in Ohio, such as units of local government, public libraries, and educational institutions.
- Nonprofit organizations operating Ohio History Connection sites under "site management agreements" are eligible to apply under their own names. Functions and fiscal responsibilities assigned to the Ohio History Connection under site management agreements are not eligible for History Fund grants. An applicant operating under a site management agreement must upload its up-to-date agreement to their application.
- Examples of eligible applicants include, but are not limited to local historical societies, historic preservation groups, public libraries, genealogical societies, university archives and special collections, archeological societies, county records management offices, and incorporated "friends" groups of any of the above.

- **Ineligible applicants** include for-profit businesses and entities, private individuals, current History Fund grant recipients with projects underway, and the Ohio History Connection.
  - Ineligible applicants may serve as paid contractors to grant awardees but are not eligible to apply for History Fund grants directly.
  - Ohio History Connection staff or programs shall not serve as contractors for a History Fund projects. The Ohio History Connection staff shall not endorse projects for funding.
  - One grant per organization at a time. Otherwise eligible grantees that have an open project with the History Fund are not eligible to apply again until the first grant has closed (i.e. the application was not funded or, if funded, the History Fund has accepted the grantee's final report).

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

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

### **Bricks & Mortar**

Bricks & Mortar projects can involve:

- Rehabilitation, restoration, protection, or acquisition of historic properties and archaeological sites listed in the National Register of Historic Places or designated by a local historic preservation ordinances (usually as a [Certified Local Government](#)).
- Building work or construction directly related to the preservation of historical or archival collections regardless of the building's historic status. If an extant building is in the National Register, any addition "shall not destroy historic materials that characterize the property" (for details regarding additions to NR-listed properties see the [Standards for Rehabilitation, #9 and #10](#).)

#### *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.
  - To meet the Grant Minimum amount and Match Requirement, the total cost of your project (grant request + match amount) must exceed approximately \$3,350 ( $\$3,350 \times 60\% = \$2,010$ ).
- Properties under consideration for rehabilitation, restoration, or preservation must be owned by the applicant.

- Bricks & Mortar projects will require a preservation 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.

## **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 \$3,000 project, the History Fund grant would provide up to \$2,400 and applicant's match would be \$600.
  - To meet the Organizational Development Grant Minimum amount and Match Requirement, the total cost of your project (grant request + match amount) must exceed \$1,250 ( $\$1,250 \times 80\% = \$1,000$ ).

## **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 preservation of historical collections and archives.

Projects funded under this broad category can 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.
  - To meet the Grant Minimum amount and Match Requirement, the total cost of your project (grant request + match amount) must exceed approximately \$3,350 ( $\$3,350 \times 60\% = \$2,010$ ).

## ***When do we receive our grant money?***

History Fund awards are now **reimbursement grants**. Your grant award will be paid in full upon submission and approval of your final project report. Please plan accordingly.

Recognizing that some grant recipients may require funds sooner, you also have the option of requesting up to 40% of your grant award as partial reimbursement while your project is underway.

Requests for partial reimbursement must meet the following conditions:

- You must complete and return all paperwork required to initiate your project, including your signed grant agreement. (Depending on your project, an approved Request for Proposal and revised budget and/or project schedule may also be required.) Required paperwork is listed in the grant agreement.
- You must document that the project is progressing towards its eventual completion. This can include demonstrating that you have accomplished initial objectives described in your application's narrative, showing that you have completed items in your Work Schedule, or submitting a required mid-project report that documents substantive progress (grant reporting requirements described in the application)
  - The History Fund supports a variety of different history projects, so proof of progress will vary by project.
- You may request only one advance payment over the life of your project.
- A recipient who does not complete their project by the time allotted (including any extensions) is required to return the advance. The returned funds will be added to the following year's pool of grant funds.

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

- Acquisition of historical materials for an institution's collection.
- Buildings: cost of moving or reconstructing. Costs for remodeling buildings unrelated to what is described in "Bricks & Mortar" above are also ineligible. For example, general maintenance and redecorating are not eligible.
- Copyright: Projects that would convert to a digital format material to which the applicant intuition does not hold the copyright. 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.

- Ongoing costs of operation, such as utilities, security system maintenance fees, grounds keeping, hosting services for websites, digital image storage, etc.
- Creation of new public works of art, including monuments, sculptures, and murals that do *not* address Ohio history and the goals of the History Fund. History Fund grants could support the preservation of historic public works of art.
- 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, go to [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.

Contact the Ohio History Fund at the Ohio History Connection if you have a question about whether an activity is eligible for funding.

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

- Recommendations for funding are made by a panel of professionals who represent the grant program's constituencies (local historians, historic preservation and museum professionals, archaeologists, archivists, genealogists, etc.). Ohio History Connection staff members review applications for completeness and eligibility for the program and prepare applications for review by the panel. Panel members are appointed annually by the Ohio History Connection's executive director.
- Projects are scored according to a rubric based on the criteria outlined above. [Click here](#) to read *Sample Reviewer Forms* (the link takes you to the History Fund's "Apply for a Grant" page; scroll down to "Application Related Resources" for the review forms). The highest scoring projects are recommended to the Ohio History Connection's director for funding. Projects may receive full or partial funding.
- Final funding decisions will be made by the executive director of the Ohio History Connection.
- 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 disbursement of the grant.

## ***Questions?***

Contact:

**Andy Verhoff**  
**Ohio History Fund & Outreach Manager**  
**State Historic Preservation Office / Ohio History Connection**  
**800 East 17<sup>th</sup> Avenue / Columbus, OH 43211**  
**614-562-4490 (cell) / 614-297-2341 (office)**  
**[averhoff@ohiohistory.org](mailto:averhoff@ohiohistory.org)**