



# Sample Final Report & Instructions

## Ohio History Fund

### For Reference Only

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

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

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

- You can also find project reporting materials on History Fund's website by clicking on "Grant Administration," but you still have to log in to complete the reports.

To make completion of the **budget** part of the report go smoothly:

- Follow the instructions embedded in the Final Report Budget Form
- Have handy a copy of the budget you submitted with your successful grant proposal, or a later version that you submitted because you received a partial grant or because of changes to the budget as the project unfolded.

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

- Photographs and images that document the project.
- If a Bricks & Mortar project, the project's completed Maintenance Agreement.
- Materials which prove that you acknowledged History Fund support of your project, such as the required project sign and print notices (these are in addition to those submitted in your Mid-Project Report).
- Copies of letters to your Ohio House Representative, Ohio Senator, and U.S. House of Representatives Member, and both of our state's U.S. Senators – unless you submitted them in your Mid-Project Report (five letters total).

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

The deadline for submission of the final project report is noted in your grant agreement.

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

Thank you for taking the time to complete this report. Once we make the final disbursement of the grant, you are welcome to apply as a part of our next grant round.

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

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

# History Fund 2024-2025 (FY25)

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## *Ohio History Connection*

### *The Purpose of Your Final Report*

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

Upon acceptance of this report, the Ohio History Connection will forward to you an invoice for your grant award, which you will sign and return. Upon receipt of the invoice, the Ohio History Connection will issue a check to your organization for the grant amount.

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

The Ohio History Connection will use the information in this and your Mid-Project Report to chronicle the progress of the History Fund program and its use of funds. The Ohio History Connection's History Fund is supported primarily by donations Ohioans make through their state income tax returns, by purchasing Ohio History "mastodon" license plates, and through designated gifts to the Ohio History Connection.

The information provided in your report also helps the Ohio History Connection make the case for the History Fund, which is imperative. The Ohio History Connection must raise a minimum of \$50,000 annually through the tax check-off, or it will be removed from the state income tax return form. This unhappy occasion would threaten the continuation of the History Fund grant program. Conversely (and better!) the more the History Fund receives in donations, the more it makes in grants.

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

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

### **Date of Report\***

*Character Limit: 10*

## *Project Name & Category*

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### **Project Name\***

*Character Limit: 100*

### **Funding Category\***

Select the type of category which best describes your project.

#### **Choices**

Organizational Development

Programs & Collections

Bricks & Mortar

## *Budget Summary*

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### **Budget Final Report Form\***

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

Navigate among the spreadsheet's worksheets by clicking on the colored tabs at the bottom of the spreadsheet.

[PROGRAMS & COLLECTIONS and ORGANIZATIONAL DEVELOPMENT, example of completed Final Project Report Budget Form](#)

[BRICKS & MORTAR, example of completed Final Project Report Budget Form](#)

[Click here](#) to also find these same spreadsheets at the History Fund's web pages "Grant Administration / History Fund Resources"

*File Size Limit: 1 MB*

## *Project Summary*

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

### **#1\***

**What did your project accomplish?**

*Character Limit: 3000*



**#2\***

Who benefited from your project? Who will continue to benefit from the project now that it is concluded? Make sure your answer also indicates how many people were affected by the project.

- **NOTE:** “Who” may include audiences for public programs or exhibits, contractors and workers on Bricks & Mortar projects, users of digitized materials, interns who worked on collections care projects, etc.

*Character Limit: 3000*

**#3\***

What parts of your project went really well? What parts of the project would you do differently? How would you have done them differently?

- **NOTE:** explain any budget variances of greater than 20% in this section.

*Character Limit: 3000*

**#4\***

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

*Character Limit: 3000*

**#5\***

To help the History Fund highlight your project, please include any significant quotes or descriptions of memorable moments. Also feel free to share noteworthy revelations or insights garnered from the project.

*Character Limit: 3000*

**#6 Copies of Contracts**

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

- **REMINDER:** If necessary, cut and paste multiple contracts into one document and then upload that document here, instead of attempting to upload each contract separately. The software is not configured to upload separate documents, just one.

*File Size Limit: 5 MB*

## *Project Photographs, Images, and Products*

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Before, during, and after photos of projects are worth a thousand words. Upload photos and images of your project.

- **NOTE:** photos are required for Bricks & Mortar projects.

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

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

The total size of uploads cannot exceed 10 MB.

**REMINDER:** Cut and paste all your photos and the photo key into one document and then upload that document here, instead of attempting to upload each photo and the photo key separately. The software is not configured to upload separate documents, just one.

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

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

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

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

### Photo / Image Upload\*

*File Size Limit: 10 MB*

### *Bricks & Mortar Grants Only: Preservation Agreement*

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

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

You can also [click here](#) to find a template of the Preservation Agreement on the History Fund's web pages "Grant Administration / History Fund Resources."

### Preservation Agreement

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

*File Size Limit: 1 MB*

## *Acknowledging History Fund Support*

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### Upload Promotional Materials\*

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

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

*File Size Limit: 5 MB*

## *Letters to Elected Officials*

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### Upload Letters to Elected Leaders

If not submitted with your Mid-Project Report, upload letters to elected leaders as described in your grant agreement, including your 1) state representative, 2) state senator, 3) U.S. House of Representative member, and 4) both of Ohio's U.S. Senators (a total of five letters).

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

*File Size Limit: 1 MB*

## *Final Report Checklist*

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

## Choices

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

## Confirmation

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### Confirmation\*

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

### Choices

Confirmed

### Project Director Name & Daytime Phone Number\*

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

*Character Limit: 300*



# Overview of Final Report Budget Form

The Final Report Budget Form enables you to make a final accounting of expenses for your Ohio History Fund-supported project.

- To complete the Final Report Budget Form you will need a copy of the budget you submitted at the *start* your project. That budget may either be the one you submitted with your grant application or a later version, revised because you received a partial grant or because of changes to the budget as your project unfolded.

This final budget form consists of three separate spreadsheets, which you can find by clicking the tabs at the bottom of the form:

1. **Budget Spreadsheet – Final**
2. **Construction Budget – Final**
3. **Comparison – Final v. Budgeted**

The form also includes these two tabs, for your information:

- **Budget Terms Defined**
- Budget Categories Described

For **Organizational Development** and **Programs & Collections** projects, **two** of the three spreadsheets are required: the Budget Spreadsheet and the Comparison – Final v. Budgeted. For **Bricks & Mortar** projects, all **three** are required.

See specific spreadsheets for further instructions. See the Sample Final Report Budget Forms for examples of completed final budgets.

Once you complete this form, upload it where indicated to your Final Project Report form. We will review the entire report and reply with any questions. Once your Final Project Report is accepted and you sign the invoice form we send, we will disburse your grant payment.

If you have any questions, contact the Ohio History Fund using the information below.

## ***Have Questions? Need Help?***

Contact:

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



<i>subtotal</i>		\$	-	\$	-	\$	-	\$	-
<b>EQUIPMENT</b>		\$	-	\$	-	\$	-	\$	-
		\$	-	\$	-	\$	-	\$	-
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<b>MARKETING &amp; PROMOTION</b>		\$	-	\$	-	\$	-	\$	-
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<i>subtotal</i>		\$	-	\$	-	\$	-	\$	-
<b>PROFESSIONAL DEVELOPMENT</b>		\$	-	\$	-	\$	-	\$	-
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<i>subtotal</i>		\$	-	\$	-	\$	-	\$	-
<b>TRAVEL</b>		\$	-	\$	-	\$	-	\$	-
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<i>subtotal</i>		\$	-	\$	-	\$	-	\$	-
<b>TOTAL</b>		\$	-	\$	-	\$	-	\$	-
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		\$	-	\$	-	\$	-	\$	-
		\$	-	\$	-	\$	-	\$	-
<i>subtotal</i>		\$	-	\$	-	\$	-	\$	-

## Final Report Budget Form - History Fund

Construction Budget Spreadsheet - Final

Grant Project Title:

Applicant Organization:

The **Construction Budget - Final Spreadsheet** is required only for projects in the **Brick & Mortar** category. **NOTE: Items marked with an asterisk (\*) are required.**

**Note on budget math:** amounts in the **Total** column = amounts in **History Fund Grant Request** column + amounts in **Match** column.

Construction Budget Categories	Total*	Paid from History Fund Grant funds* How much of the Total Cost line item did the grant to pay for?	Covered by Match* How much of the Total Cost of line item did you match?	Source of Match*	Kind of Match*
<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 BUDGET TOTAL</b>	\$ -	\$ -	\$ -		



## Final Report Budget Form - History Fund

### Comparison of Final Grant Expenses v. Budgeted Grant Expenses

**Grant Project Title:**

**Applicant Organization:**

**Instructions:** This spreadsheet compares the budget at the beginning of your project ("Budgeted Grant Expenses") and your budget at the end of the project ("Final Grant Expenses"). We use this comparison to understand how projects can change over their life cycle, if they do.

The numbers you enter into the "Budget Spreadsheet - Final" will automatically appear in "Final Grant Expenses" column below. For the "Budget Grant Expense" column, manually enter the numbers from the budget you developed at the start your project. That budget may be the one you submitted with your grant application or a later version, submitted because you received a partial grant or changes to the budget as the project unfolded.

The spreadsheet will calculate the difference ("variance") between the Final and Budgeted Project Amounts, if any. If the percentage is greater than 20%, describe why in the space provided. If the variance is 19% or less, no explanation is required. See Sample Final Report Budget Forms for examples.

**NOTE:** to protect calculation formulas, numbers cannot be directly entered into the following columns: Final Grant Expenses, Amount of Variance and % of Variance. Numbers and information can be directly entered into these columns: Budgeted Total Cost and Describe reason for variance.

Budget Category	Final Grant Expenses (from Budget Spreadsheet-Final)	Budgeted Grant Expenses (from budget submitted w/ grant application or later revisions)	Difference between Final and Budgeted Project Amounts (Variance)		
			Amount of Variance	% of Variance	Describe reason for variance, if final expense over/under 20% or more of budgeted expense
<b>PERSONNEL</b>					
Project director*	\$ -	\$ -	\$0.00	#DIV/0!	
Project bookkeeper*	\$ -	\$ -	\$0.00	#DIV/0!	
Other paid staff of applicant organization	\$ -	\$ -	\$0.00	#DIV/0!	
	\$ -	\$ -	\$0.00	#DIV/0!	
	\$ -	\$ -	\$0.00	#DIV/0!	
	\$ -	\$ -	\$0.00	#DIV/0!	
Professional services	\$ -	\$ -	\$0.00	#DIV/0!	
	\$ -	\$ -	\$0.00	#DIV/0!	
	\$ -	\$ -	\$0.00	#DIV/0!	
	\$ -	\$ -	\$0.00	#DIV/0!	
Volunteers	\$ -	\$ -	\$0.00	#DIV/0!	



	\$ -	\$ -	\$0.00	#DIV/0!	
	\$ -	\$ -	\$0.00	#DIV/0!	
	\$ -	\$ -	\$0.00	#DIV/0!	
<b>Personal Subtotal</b>	\$ -	\$ -	\$0.00	#DIV/0!	
<b>MATERIALS &amp; SUPPLIES</b>	\$ -	\$ -	\$0.00	#DIV/0!	
<b>EQUIPMENT</b>	\$ -	\$ -	\$0.00	#DIV/0!	
<b>MARKETING &amp; PROMOTION</b>	\$ -	\$ -	\$0.00	#DIV/0!	
<b>PRINTING &amp; PUBLICATION</b>	\$ -	\$ -	\$0.00	#DIV/0!	
<b>PROFESSIONAL DEVELOPMENT</b>	\$ -	\$ -	\$0.00	#DIV/0!	
<b>TRAVEL</b>	\$ -	\$ -	\$0.00	#DIV/0!	
<b>Non-Personnel Subtotal</b>	\$ -	\$ -	\$0.00	#DIV/0!	
<b>BUDGET SPREADSHEET TOTAL</b>	\$ -	\$ -			
<b>Construction Budget Categories</b>					
General Conditions	\$ -	\$ -	\$0.00	#DIV/0!	
Site Work	\$ -	\$ -	\$0.00	#DIV/0!	
Concrete	\$ -	\$ -	\$0.00	#DIV/0!	
Masonry	\$ -	\$ -	\$0.00	#DIV/0!	
Metals	\$ -	\$ -	\$0.00	#DIV/0!	
Wood & Plastics	\$ -	\$ -	\$0.00	#DIV/0!	
Thermal/Moisture	\$ -	\$ -	\$0.00	#DIV/0!	
Doors & Windows	\$ -	\$ -	\$0.00	#DIV/0!	
Finishes	\$ -	\$ -	\$0.00	#DIV/0!	
Specialities	\$ -	\$ -	\$0.00	#DIV/0!	
Special Construction	\$ -	\$ -	\$0.00	#DIV/0!	
Conveying Systems	\$ -	\$ -	\$0.00	#DIV/0!	
Mechanical/Electrical	\$ -	\$ -	\$0.00	#DIV/0!	
Other, please specify:	\$ -	\$ -	\$0.00	#DIV/0!	
<b>CONSTRUCTION BUDGET TOTAL</b> (from Constr. Budget Final)	\$ -	\$ -	\$0.00	#DIV/0!	
<b>GRAND TOTAL</b>	\$ -	\$ -	\$0.00	#DIV/0!	



## BUDGET FORM TERMS DEFINED

See samples of completed Final Budget Forms at [www.ohiohistory.org/historyfund](http://www.ohiohistory.org/historyfund) > "Grant Administration"

**NOTE:** Items in the spreadsheets marked with an asterisk (\*) are required.

**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.

**Person/Organization providing Goods/Services\*:** whether an individual or a company, who provided the good or service? If naming an individual, also give their title (example: Jane Jones, Curator). In the Volunteer section, it is not necessary to list each volunteer by name. You may copy items from your original budget (or subsequently revised one) if applicable.

**Total Cost\*:** the amount paid by the History Fund grant + the monetary value of the Match for each line item. The History Fund number and the Match number must equal the Total Cost for each line item.

**Paid from History Fund Grant funds\*:** the part of the Total Cost for each line item paid by the History Fund grant.

**Covered by Match\*:** the part of the Total Cost for each line item covered by your Match. Match can take the form of donated goods and services, volunteer labor, and staff time, among other sources.

**Source of Match\*:** if not otherwise clear, who contributed the match? Examples: the applicant in the form of staff and/or volunteer time, a local business (name?), another grant maker?

**Kind of Match\*:** if not otherwise clear, briefly describe the match. Examples: is the match is paid staff time, time donated by volunteers, donated goods and service, other grants?

## 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



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.

**PRESERVATION AGREEMENT**  
**Ohio History Fund**  
**Bricks & Mortar Grant**

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

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

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

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



provision held to be invalid.

Preservation Agreement entered into by:

\_\_\_\_\_  
Ohio Historical Society date

\_\_\_\_\_  
Grantee/Owner date

\*\*\*\*\*

State of Ohio )

ss: County of \_\_\_\_\_)

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

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

Notary Public

This instrument prepared by: Ohio History Connection