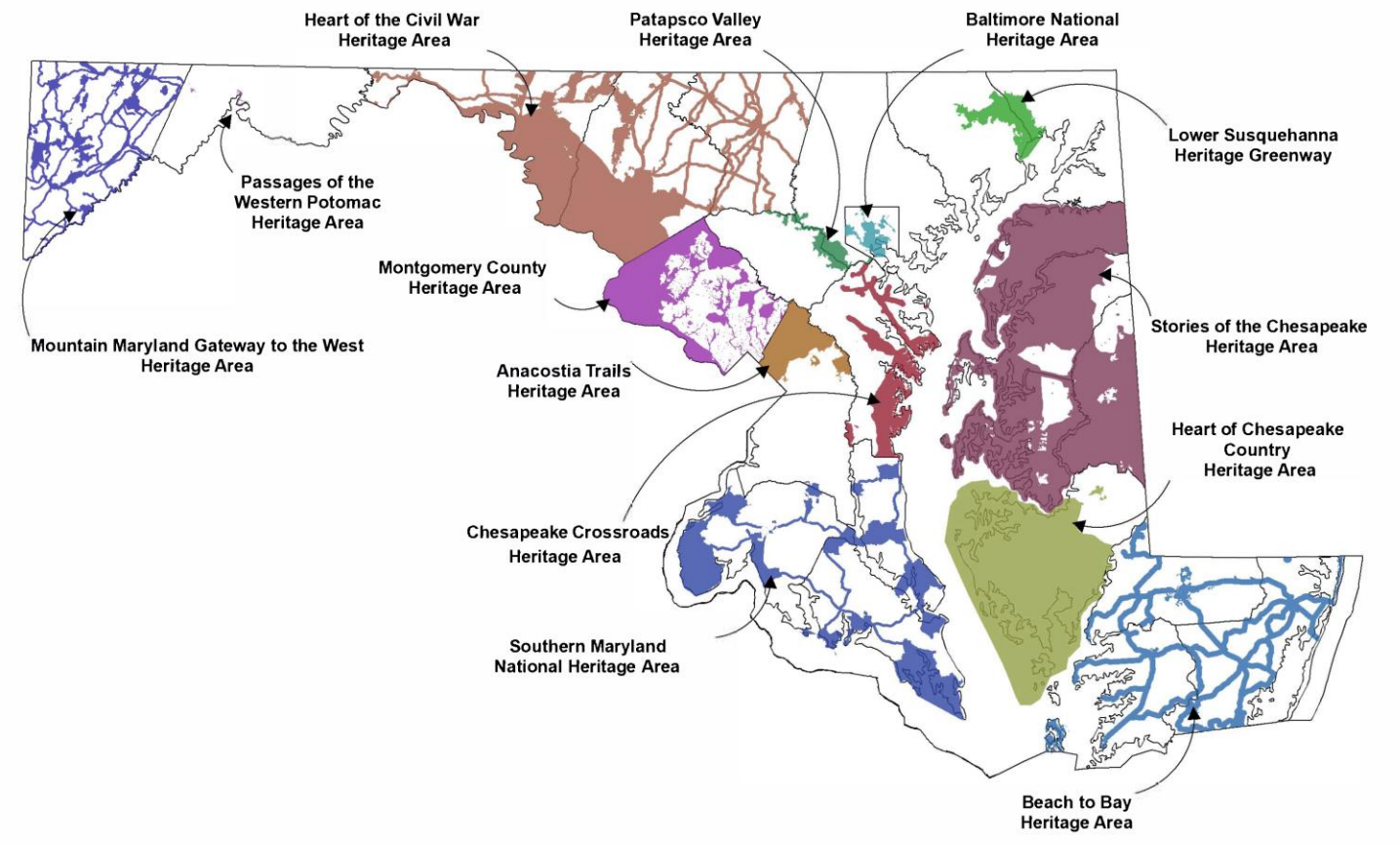




# FY 2025 Orientation for Grantees



DEPARTMENT OF PLANNING  
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# INTRODUCTIONS

## MHAA Staff

One will be your Project Monitor:

**Ariane Hofstedt, Administrator**

**Andrew Arvizu, Assist. Administrator**

**Martha Waldron, Assist. Administrator**

## MHT Staff

Assist with Processing Grant Agreements and  
Grant Payments:

**Sabrina Roundtree, Assistant Grants Manager**

**Caitlin Swaim, Assistant Grants Manager**



# CONGRATULATIONS!



## Let's Get Started!



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# WHY ARE WE HERE?

To Ensure Good Stewardship  
of State Funds



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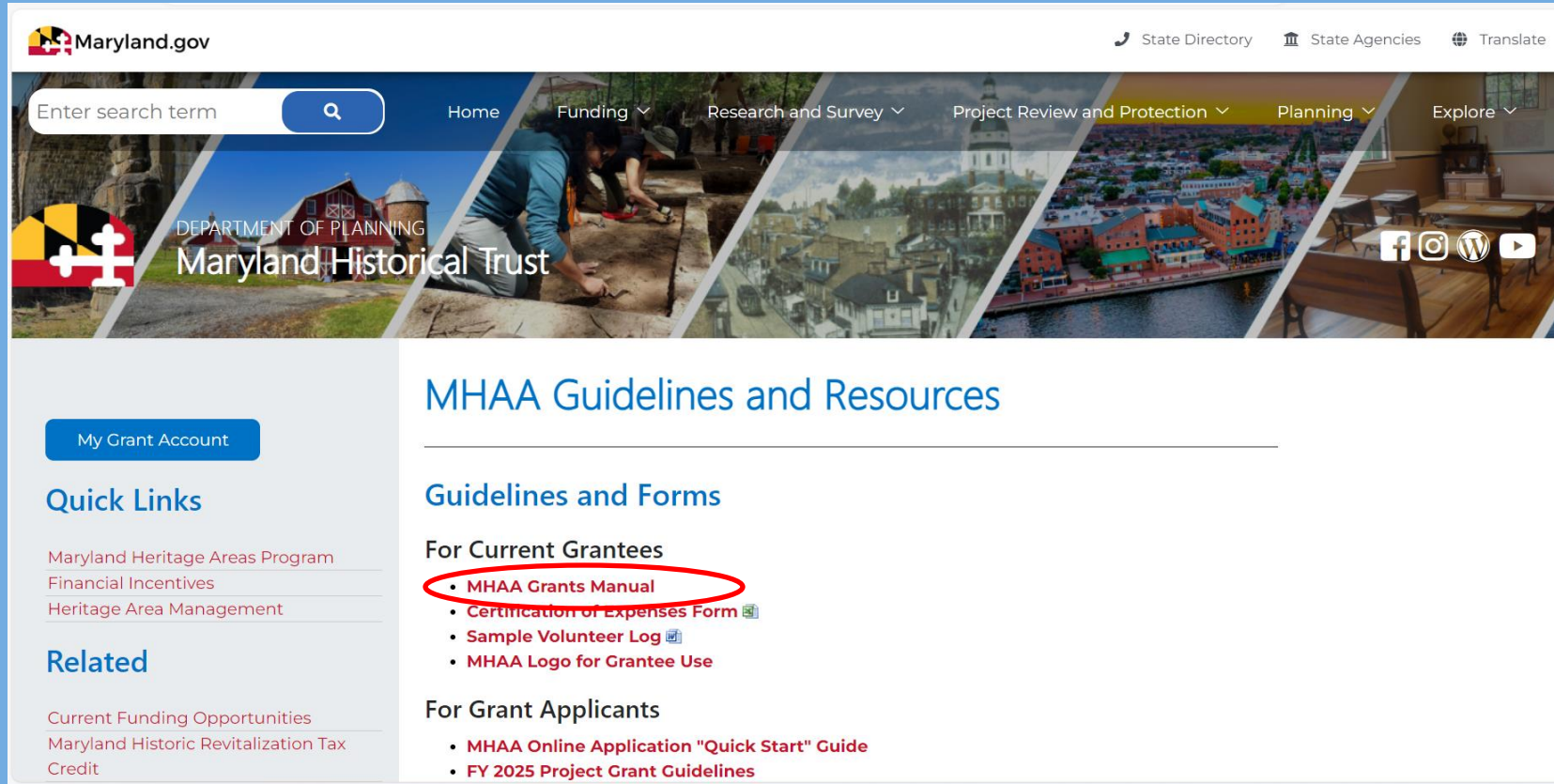


# TODAY'S AGENDA

1. Grant Manual
2. Grant Agreements and Payments
3. Project Summary Sheets
4. Legal Requirements/SDAT/Signatories
5. Navigating Your Grant Agreement
6. \*NEW\* Acknowledgment of MHAA Funding
7. Grantee Responsibilities
8. Amendments
9. Items Not Covered by Grant
10. Types of Match Allowed
11. Volunteers
12. Procurement
13. Submitting Reports Online
14. Schedule of Payments/Direct Deposit
15. Request for Payment Form
16. Financial Documentation/Record Retention
17. Financial Spot Check Policy
18. Compliance and Easement Review
19. Quiz
20. Contact Info for Questions



# MHAA GRANTS MANUAL



The screenshot shows the Maryland Historical Trust website. At the top, there is a navigation bar with the Maryland.gov logo, a search bar, and menu items for Home, Funding, Research and Survey, Project Review and Protection, Planning, and Explore. Below the navigation bar is a banner image with the text "DEPARTMENT OF PLANNING Maryland Historical Trust" and social media icons for Facebook, Instagram, and YouTube. The main content area is titled "MHAA Guidelines and Resources" and contains a section for "Guidelines and Forms". Under this section, there are two sub-sections: "For Current Grantees" and "For Grant Applicants". The "For Current Grantees" section lists four items: "MHAA Grants Manual" (circled in red), "Certification of Expenses Form", "Sample Volunteer Log", and "MHAA Logo for Grantee Use". The "For Grant Applicants" section lists two items: "MHAA Online Application 'Quick Start' Guide" and "FY 2025 Project Grant Guidelines". On the left side of the page, there is a sidebar with a "My Grant Account" button, "Quick Links" (Maryland Heritage Areas Program, Financial Incentives, Heritage Area Management), and "Related" (Current Funding Opportunities, Maryland Historic Revitalization Tax Credit).

## MHAA FY25 Grants Manual

All information contained in this orientation can also be found in the MHAA FY25 Grants Manual



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# THE GRANT AGREEMENT/PAYMENT TIMELINE

## Getting you paid in 4 steps!

- STEP 1: Award notification (July '24 via email sent from MHAA Grants Staff)
- STEP 2: Verify project details (form due from grantees August 31, 2024 via online Project Summary Sheet)
- STEP 3: Grant agreements generated, emailed to grantees for signature, and executed (Sept. '24 – Jan.'25 via Adobe Sign). Please return promptly!
- STEP 4: Payments generated from MD Comptrollers Office – 50% of your award - 30-60 days after executed grant agreement (as soon as Oct. '24 thru Feb.'25, highly recommend sign up for electronic payment)





# PROJECT SUMMARY SHEET: HELPFUL TIPS

- Access via your online account in the MHT/MHAA Grants Portal
- Certify that you have completed this orientation and short quiz via check box
- Confirms name of grantee organization and project contact, and your project monitor
- Tell us if any changes to project timetable, budget, and/or scope of work (be realistic about how long it will take to complete the project)
- Confirms grant and match award amounts and project start and end dates
- Communicates easement and preservation requirements/special conditions
- MUST provide name, title and email of authorized person signing grant agreement
- For capital project, indicate if your org. owns the property or upload property consent letter from owner

YOU MUST REVIEW AND SUBMIT, EVEN IF THERE ARE NO CHANGES!

- The sooner you return the project summary sheet, the sooner your grant agreement will be generated and you will get your first payment!





# LEGAL REQUIREMENTS

- The Grant Agreement is a contract – by signing this contract, you are agreeing the terms
- Read this document in its entirety and refer to it regularly
- Ensure that others in your organization also read it and are familiar with its terms
- The agreement must be signed by someone LEGALLY AUTHORIZED to enter into contracts on behalf of your organization
- Will be sent to you via “Adobe Sign” – requesting digital signatures

MHT is no longer requiring a Corporate Resolution to verify signatories



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# AUTHORIZED SIGNATORIES

- The Grant Agreement must be signed by someone who is legally authorized to enter into contracts for your organization.
- For nonprofits, this will most likely be the director/president of the Grantee's board, an elected officer of the Grantee's board, or the executive director, president, or equivalent position that has been appointed and authorized by the Grantee's bylaws.
- For local, state, and federal agencies and/or jurisdictions, authorized individuals may include, but are not limited to, city managers, mayors, city administrators, commissioner presidents, agency heads, and town administrators.

*If you are not sure who is legally authorized, check your organizational bylaws. If it is not clear that the representative has the legal authority to sign this Agreement on behalf of Grantee, additional documentation will be required.*



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# STATE DEPT. OF ASSESSMENTS AND TAXATION (SDAT)

- Your organization must be in Good Standing with SDAT - can't execute grant agreement or issue payments if not
- Good idea to check every time you submit a Request for Payment – if not, risk having funds recaptured
- Usually an easy fix – but you need to fix it, we can't
- You may even be able to fix the problem online!

Check your status online at: <https://egov.maryland.gov/businessexpress/entitysearch>



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# NAVIGATING YOUR GRANT AGREEMENT

Main agreement is only 7 pages long, key sections include:

- **Grant and Project Terms**
- **Project Budget**
- **Terms of the Agreement (timelines and report due dates)**
- **Easement and Preservation Requirements**
- **Acknowledgement of MHAA Support**
- **Notices (project monitor and grantee contact)**
- **Execution in Counterparts/Electronic Signatures and Authority to Sign**



# NAVIGATING YOUR GRANT AGREEMENT

## Grant and Project Terms

(Grant Amount, Scope of Work, and Property Address, if applicable)

### SAMPLE Scope of Work:

The Project involved designing and installing exhibit panels. The Grant and the Match may support the costs of the design, editing, fabrication, and installation of interpretive exhibit panels. The Match may also include staff time and volunteer time.

Please review the list of items in your Scope of Work carefully. Any expenses in your original application that were deemed ineligible during the review process will not be included and this may require you to revise your project.



# NAVIGATING YOUR GRANT AGREEMENT

## Project Budget

(MHAA Grant, Match, Total MHAA Project Budget)

PROJECT BUDGET SAMPLE (does not include Other Project Costs)

MHAA GRANT	\$50,000
MATCH	\$50,000
TOTAL MHAA PROJECT BUDGET	\$100,000

Encourage you to devise your own consistent method (i.e. Excel spreadsheet) for tracking expenses of approved budget items and other project costs - will need to be reported when requesting a payment.

Please note you have the flexibility to spend any amount on any approved line item listed in your Scope of Work as long as you do not exceed approved grant and match amounts.



# NAVIGATING YOUR GRANT AGREEMENT

## Terms of the Agreement

- Start Date
- Mid-Project Report Due Date
- Project End Date
- Final Report Due Date

7/11/24	“PROJECT START DATE”: Grant funds may be used for approved Project expenses incurred on or after this date.
7/30/25	“MID-PROJECT REPORT DUE DATE”: Grantee must submit online a Mid-Project Report, including any financial documentation required with a completed Request for Payment.
7/30/26	“PROJECT END DATE”: All work items detailed in the Scope of Work must be completed. All eligible Project expenses to be reimbursed by Grant funds must be incurred.
9/30/26	“FINAL REPORT DUE DATE”: Grantee must submit to Project Monitor a Final Report, including any and all Project deliverables and all requested financial documentation, with a completed final Request for Payment.





# NAVIGATING YOUR GRANT AGREEMENT

**Easement and Preservation Requirements  
(formerly known as Special Conditions)**

**NO EASEMENT REQUIRED**

**HISTORIC PROPERTY, EASEMENT WAIVED**

**HISTORIC PROPERTY, EASEMENT REQUIRED**

**EXISTING EASEMENT SATISFACTORY**

**EXISTING EASEMENT MUST BE MODIFIED**



# GRANTEE RESPONSIBILITIES

- Successfully complete your project and deliverables
- Spend funds on all of the items in your Scope of Work
- Do not spend grant or match on funds outside the approved Scope of Work
- Fulfill your one-to-one match requirement
- Don't spend grant funds on match-only items
- Do not exceed your approved grant amount
- Adhere to your timetable, or request and amendment if more time is needed
- Acknowledge MHAA and local Heritage Area



# ACKNOWLEDGEMENT OF MHAA SUPPORT \*NEW\* LANGUAGE

## Acknowledgement of MHAA Support

Grantee must acknowledge MHAA's support of the Project in any public pronouncements or materials about the Project - details including exact language provided in Exhibit A under the Terms & Conditions section

*This project has been financed in part with State funds from the Maryland Heritage Areas Authority but does not necessarily reflect its views or policies.*



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# ACKNOWLEDGEMENT OF MHAA SUPPORT

Grantee and any consultant hired by grantee must acknowledge MHAA at:

- Public events (interviews, ground-breaking ceremonies, dedications, media events)
- Materials (press releases, brochures, video productions, installation of exhibits, signage, web pages, etc.)
- Also acknowledge local heritage area by name and logo

**Grantee must get MHAA's review and approval of the materials listed above which are funded by the Grant prior to production of such materials (two weeks in advance)**



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# ACKNOWLEDGEMENT OF MHAA SUPPORT

## ACKNOWLEDGMENTS

### Kent Narrows Development Foundation

**Executive Director**  
Gigi Windley

**Commissioner Liaison**  
Phil Dumenil

### 2021 & 2022 Board Members

Jody Schulz  
*Chair*

Joe Pomerantz  
*Vice Chair*

Victoria Hoffman  
*Treasurer*

Pat Worns  
*Secretary*

Jerry Dammeyer

Mike Foster

Justin Kiernan

Sheryl Jaros

Kelly Phipps

Jeff Smith

Jason Ruth

Walt Thompson

Jason Tuel

Judy Wink

### Queen Anne's County Parks and Recreation Division

Steve Chandlee  
*Director*

James Wood  
*Manager Public Landings*

Nancy Scozzari  
*Chief of Parks Resource Planning*

### Queen Anne's County Public Works

Shane Moore  
*Chief Roads Engineer*



*This project has been financed in part with State Funds from the Maryland Heritage Areas Authority, an instrument of the State of Maryland. However, the contents and opinions do not necessarily reflect the views or policies of the Maryland Heritage Areas Authority.*



KENT NARROWS | WAYFINDING SIGNAGE PROGRAM | CONCEPT DESIGN & ROW BUDGET PACKAGE v2.1 | 06.23.2022

01 | 3



*Texas Western's all Black starting line up wins NCAA Championship game held at the University of Maryland, 1966*

*This project is funded by the National Park Service and the Maryland Historical Trust and managed by Anacostia Trails Heritage Area/Maryland Milestones with support from the Maryland-National Capital Park and Planning Commission's Black History Program and the Prince George's County History Consortium. Research and writing by Meagan Baco, Alexander Brooks, Nathan Dennies, and Leigh Walters. Special thanks to Civil War Trails, Doswell E. Brooks Elementary School, Frederick Douglass High School Alumni Association, The Griffin Estate, Hyattsville CDC, Laurel Historical Society, Laurel History Boys, openbox9, Prince George's County Historical Society, Prince George's County Memorial Library System, St. Mark's Methodist Episcopal Church, and the Town of Upper Marlboro Historic Committee.*



[WWW.PGCCIVILRIGHTS.ORG](http://WWW.PGCCIVILRIGHTS.ORG)

KENT NARROWS + Gable +



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# AMENDMENTS

If you need to add or remove items from the Scope of Work, you may do so by reaching out to your Project Monitor, as listed in your Project Summary Sheet

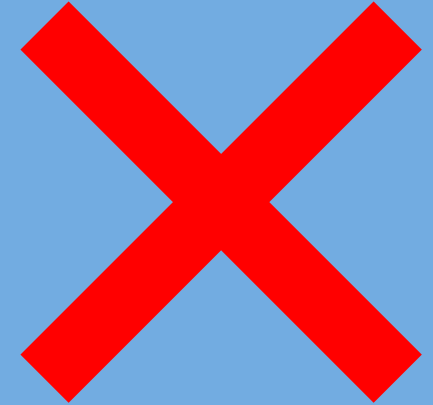
- Amendments allow grantees to:
  - Extend Mid-Project or Final Project Report due dates
  - Extend overall Project End Date
  - Adjust the Scope of Work (add or remove budget line items)
- Email your Project Monitor to request an amendment
  - Explain why you need the amendment
  - Include proposed updated timetable and/or scope
  - Include basic info about the status of your project grant

Once approved, your Project Monitor will send you an email granting your extension and/or amendment.



# ITEMS NOT COVERED BY GRANT FUNDS

- Anything that's not listed in your Scope of Work
- Alcohol
- Operating/overhead costs (exception for non-profits with non-capital projects: 10% of grant award)
- Marketing (can be used for match)
- Staff salaries for time spent on the project (exception for contractors hired to work on project)





# TYPES OF MATCH ALLOWED

- Staff and volunteer time for work directly related to the project
- Donated (or discounted) professional services
- Donated (or discounted) materials
- Staff time from other organizations for work directly related to the project
- Cash purchases and expenditures

Other Project Costs: everything else above the required 1 to 1 match – do not count towards the match but should be tracked and reported



# VOLUNTEER TIME

Keep a log of your volunteer hours - Include who, what, when, how long

Use individual timesheets or a spreadsheet

Multiply the total hours by the value of volunteer time in

Maryland: [http://independentsector.org/volunteer\\_time](http://independentsector.org/volunteer_time). Current rate is \$34.99.

You are not required to use this specific form, but if you'd like to, just email your project monitor for a copy.

**VOLUNTEER  
CONTRIBUTED TIME/MILEAGE RECORD**

Grantee : The Awesomest House Museum Project Title: The Most Wonderful Exhibit

Volunteer Name: Brenda Smith Position: Volunteer and Board Member

Hourly Rate: \$28.65 Mileage Rate: \$0.575

Month and Year: August 2020

DATE	HOURS	MILES	DESCRIPTION OF CONTRIBUTED SERVICES & TERRITORY COVERED
1	5	0	From 1 pm to 6 pm, assisted with exhibit installation
2			
3			
4			
5			
6			
7			



# PROCUREMENT

The following procurement procedures should be followed when hiring vendors or consultants:

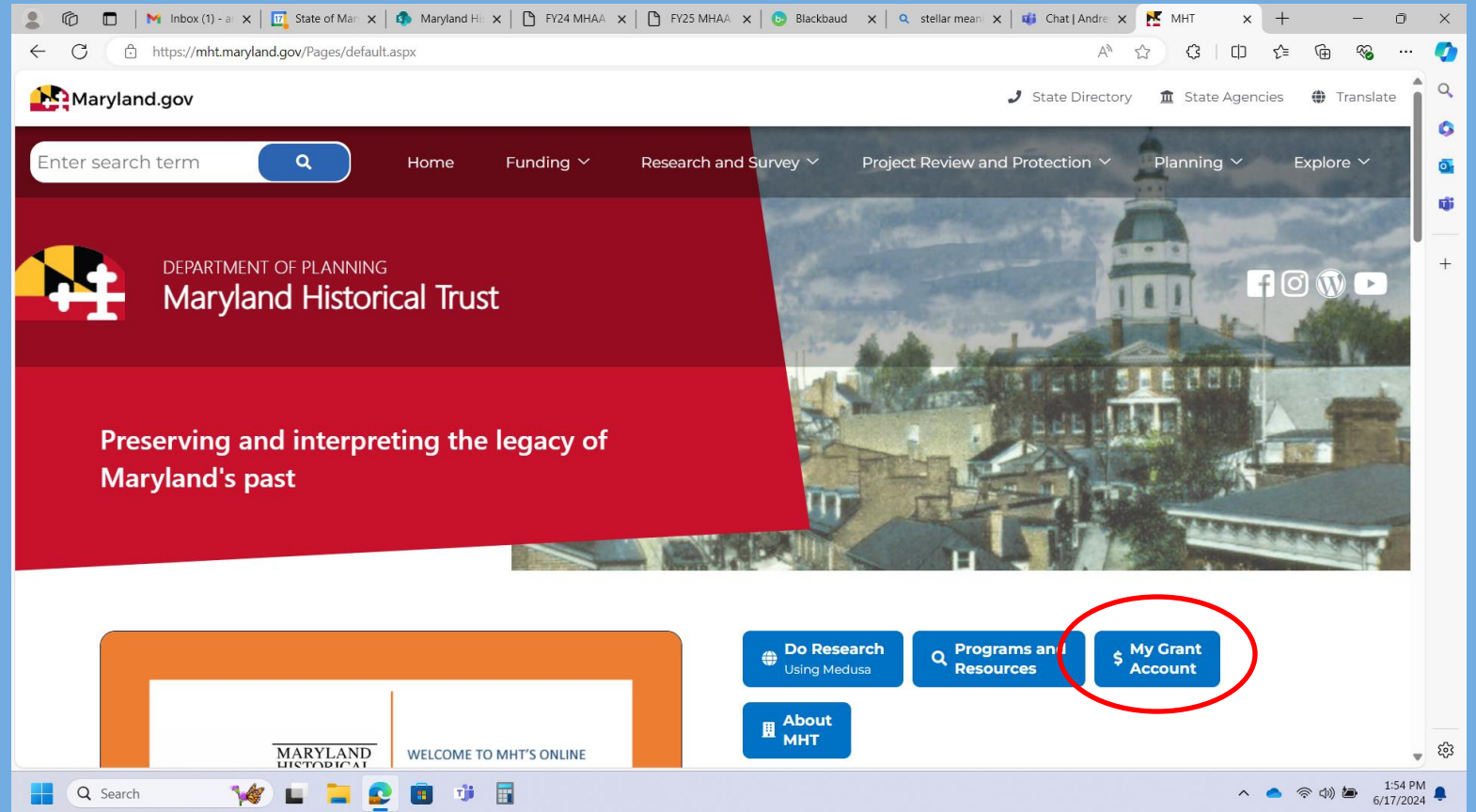
- Government organizations follow your established procedures
- Non-Profits with grant awards:
- For line items that are between \$500 and \$10,000 - strongly encouraged to obtain at least two written bids; and greater than \$10,000 - bids from at least three vendors must be obtained.
- If your MHAA Capital grant is \$90,000 or greater, you must complete a Minority Business Enterprise (MBE) Plan.



# SUBMITTING REPORTS ONLINE

All Reports are submitted ONLINE

Go to “My Grant Account” on the MHT website (maryland.gov)



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# SUBMITTING REPORTS ONLINE

- Log in using the same credentials used to create the grant application
- If you forgot your password, click “Forgot Password”
- Answer the questions in the report and upload documents as required
- Refer to the version of the Scope of Work that appears in your grant agreement when submitting reports
- If you got an approved amendment to the Scope of Work, then work from that version



# SUBMITTING REPORTS ONLINE

Applications Requirements

## Applications

The Maryland Historical Trust is pleased to provide you with this tool to manage your applications.

- To review In Progress or Submitted Applications, click the pull down menu to the right.
- You can also view applications that have been shared with you.
- If you have a report to submit, the Requirements tab will appear above. Click the tab to be taken to the Requirements page.

Show In Progress Applications ▾

Hide Viewer Only Applications

Application Name	Project Title	Requested	ID	Last Updated	My Role	Action
<a href="#">FY 2024 AAHPP Grant Application CORRECTED</a>			43067	7/11/2023	Owner	   
<a href="#">FY 2024 MHAA Management Grant Application</a>	FY 2024 Management Grant		42738	5/1/2023	Owner	   
<a href="#">FY 2024 MHAA Management Grant Application</a>	FY 2024 Management Grant		42582	4/5/2023	Owner	   
<a href="#">FY 2024 MHAA Management Grant Application</a>	FY 2024 Management Grant		42367	3/7/2023	Owner	   
<a href="#">FY 2023 Non-Capital Grant Application</a>			40327	3/7/2023	Owner	  
<a href="#">FY 2023 Non-Capital Grant Application</a>			40326	2/10/2023	Owner	  

Click the Requirements tab



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# SUBMITTING REPORTS ONLINE




Applications Requirements

## Requirements

The Maryland Historical Trust is pleased to provide you with this tool to manage your reports and submissions. If you have begun a requirement form and saved it to finish later, make sure that you select "In Progress Requirements" from the SHOW drop-down menu on the right above the red bar.

Show New Requirements

Hide

Form Name	Project Title	Type	ID	Due	Updated	My Role	Action
<a href="#">MHAA Project Summary Sheet</a>	TEST	Project Summary Sheet	159907	7/9/2020	9/6/2022	Owner	  

Select the Appropriate Report



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# SUBMITTING REPORTS ONLINE

**Project Title:**

TEST HOUSE REPAIRS

**Scope of Work:**

The Grant and Grantee's Contribution may support work on houses A, B, and D.

**Proposed Changes to Scope of Work:**

Word count 0 of 250

**Grant Award:**

100.0000

**Required Total Match:**

0.00

**Project Start Date:**

11/29/2021

**Project End Date:**

12/11/2023

**Easement and Preservation Requirements / Special Conditions**

Easement review required prior to beginning work.

**Please list the name and email of the authorized individual from the grantee organization who will be signing the grant agreement.**

**Grant Agreement Signer Name**

**Grant Agreement Signer Email**

**Notes:**

Use this field to provide any additional information, or to update fields that are not editable above. If there are no changes needed, indicate that here.

Word count 0 of 500

# SUBMITTING REPORTS ONLINE

[Contact Us](#) | [MHT Homepage](#)

[Project Summary](#)

[Attachments](#)

[Review My Requirement](#)

## Attachments

[Printer Friendly Version](#) | [E-mail Draft](#)

### Upload

The maximum size for all attachments combined is 75 MB. Please note that files with certain extensions (such as "exe", "com", "vbs", or "bat") cannot be uploaded.

Title:

File Name:  No file chosen



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# SUBMITTING REPORTS ONLINE

Contact Us | MHT Homepage

Project Summary

Attachments

Review My Requirement



**There was a problem processing your request.**

1. Have you completed the online orientation? If so, please complete the following quiz: is a required field.

**You can review the information you've provided so far and make necessary modifications here. If you're satisfied with the contents of this report, click Submit. If you're not ready to submit your report yet, click Save & Finish Later.**

Save & Finish Later

Update

Save & Finish Later

Submit

Don't Forget to REVIEW & Fix Errors



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# SCHEDULE OF PAYMENTS

- Typically, you will receive three scheduled payments under the grant agreement
- **FIRST PAYMENT:** You will receive the first 50% of your award up front, after signing your grant agreement and other legal documents
- Your **SECOND** and **THIRD** payments (typically 25%) will be issued when you submit (and your Project Monitor approves) online reports and completed Request for Payment forms
- Payment within approx. 30 days of approval of your submission
- Must be in good standing with SDAT to receive payment
- If you aren't ready to request the funds with your Mid-Project Report, you can request them when you have expended approximately 50% of your total project costs



# SCHEDULE OF PAYMENTS

## SECOND PAYMENT

- You may request up to 25% of your grant award when you submit your Mid-Project Report. You must fulfill the following:
- A satisfactory Mid-Project Report
- Adequate progress on the project; you should discuss what this will look like for your project with your Project Monitor.
- If you aren't ready to request the funds with your Mid-Project Report, you can request them when you have expended approximately 50% of your total project costs



# SCHEDULE OF PAYMENTS

## THIRD/FINAL PAYMENT

- In order to receive the final payment (usually the remaining balance of the grant) you must do the following:
- Complete all spending and work on the project before the Project End Date.
- Submit a satisfactory final report
- Submit evidence that all deliverables in your Scope of Work have been completed (photos of completed work or events, copies of reports, etc.)
- If selected for a spot check, submit all required financial documentation



# DIRECT DEPOSIT

## DIRECT DEPOSITS FOR PAYMENTS

- We **STRONGLY** suggest getting set up for Direct Deposit with the Office of the Comptroller of Maryland
- Link: <https://www.marylandtaxes.gov/divisions/gad/eft-program.php>
- Call: *(410) 260-7813, and select option 3*
- *Or email [GADCSC@marylandtaxes.gov](mailto:GADCSC@marylandtaxes.gov)*



# REQUEST FOR PAYMENT FORM

To receive a payment disbursement, you must complete a Request for Payment form

Located on the second page of your online Mid-Project and Final Project Reports

NOT required to report against individual budget line items, instead asked to provide the following totals:

- Total Grant Funds Expended to Date
- Total Match Funds Expended to Date
- Total Other Project Costs Expended to Date

When you sign, you must check a box certifying that you have incurred the grant expenditures and the information you provided is correct

Your expenditures must align with your most recently approved budget line items as spelled out in your Scope of Work



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**Tax ID** 12-345678      **Legal Name** The Awesomest House Museum in the World

**MHAA Project Monitor** Ariane Hofstedt      **Email Address** ariane.hofstedt@maryland.gov

Upon completing the Mid-Project Report, grantees who have expended roughly 50% of their award and match are eligible to request their second disbursement of 25% of their total grant award using this form. By requesting payment, you certify that all grant fund-related expenditures align with your most up to date Scope of Work, as listed on the first page of your Mid-Project Report. Further, you certify that you will retain documentation for all expenditures for at least three years after your project end date. Finally, you certify that this Request for Payment is made in accordance with the terms and conditions of the Grant Agreement made between the Grantee and the Maryland Department of Planning and that the amounts listed are correct.

**Approved Total Grant Amount** 100.0000      **Total Grant Funds Expended to Date** [Yellow Box]

**Approved Total Match Amount** 0.00      **Total Match Funds Expended to Date** [Yellow Box]

**Approved Other Project Costs** 0.00      **Total Other Project Costs Expended to Date** [Yellow Box]

**Payment Request**

**Amount Requesting:** [Yellow Box]      **Name** [Yellow Box]      **Title** [Yellow Box]      **Request Date:** [Yellow Box]

By checking the box below, you are certifying that the information that you have provided is correct and that you have only expended grant and matching funds on line items within your approved Scope of Work.

[Yellow Box]

**STATE USE ONLY**

**Date Received** [ ]      **Payment Requested** [ ]      **Amount Requested** [ ]      **Amount Approved** [ ]

**Payment Reviewed By** [ ]      **Payment Approved By** [ ]      **PCA Code** [ ]      **Date Grant Agreement Executed** [ ]

Request for Payment Form  
(formerly known as the  
Certification of Expenses)

Must fill in all fields marked  
yellow

# FINANCIAL DOCUMENTATION AND RECORD RETENTION

- Every grantee is required to retain financial documentation for up to three years after the final report due date and be prepared to provide them upon request
- Also encourage grantees to devise their own consistent method for tracking the expenses associated with the list of items in the approved Scope of Work that corresponds with their financial documentation



# FINANCIAL DOCUMENTATION AND RECORD RETENTION

What is “Financial Documentation”?

- Grantees must retain documentation of all expenditures (invoices, receipts, contracts, staff time logs, paystubs, volunteer time logs etc.)
- For standard accounting best practice, also keep cancelled checks and credit card statements (“proof of payment”)
- The expenditures must align with the final approved budget line items as listed in your Scope of work OR most recent amended Scope of Work
- Scan and upload this documentation with your final reports, if selected for a financial spot check



# FINANCIAL DOCUMENTATION AND RECORD RETENTION

## Record Keeping:

- Keep records while doing your project- don't wait until the end!
- Daily timesheets for staff and volunteer time
- Proof of expenditures
- Do this for all expenditures: grant funds AND matching funds

**Grantees must keep all materials related to the grant for three years from the project completion date!**



# FINANCIAL SPOT CHECK POLICY

Financial Spot Check Policy - A portion of grantees in each grant cycle will be randomly selected to submit the required financial documentation along with their final reports, as part of our “spot check” policy.

If you are selected for a financial spot check, you will be:

- Notified around the time when your project end date passes.
- Required to submit documentation of expenditures for all grant and match costs when you submit your final report.

Your project monitor will work with you to identify and request any missing documentation.

*If you cannot provide the required financial documentation,  
you risk having grant funds recaptured.*



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# FINANCIAL SPOT CHECK

## What to Submit:

- Proof of expenditure documents that are clearly labeled by category line item in your Scope of Work (e.g. invoices, receipts)
- If we add all the invoices and receipts together, they should equal the line items' actual expenditure amounts that you put on your Request for Payment Form
- Volunteer and staff time sheets and paystubs (if applicable)
- Print-outs from QuickBooks or other accounting software
- Documentation that matches the amounts reported in the individual budget line items in your Scope of Work



# COMPLIANCE AND EASEMENT REVIEW

For Capital Projects & Non-Capital Project that Include Disturbance to Grounds or Historic Property

- All projects receiving Maryland state funding must be reviewed to assess the effects of the project on National Register and National Register-eligible historic properties (MD State law)
- The MHT Compliance team has already reviewed your project as described in your application

Their job is to:

- Identify historic properties potentially affected
- Assess the undertaking's effects on historic properties (including archaeological)
- Seek ways to avoid, minimize or mitigate any adverse effects



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# COMPLIANCE AND EASEMENT REVIEW

If MHT Compliance staff determines that anything is required for your project these are called “Easement and Preservation Requirements” (formerly known as Special Conditions)

Easement and Preservation Requirements will be listed in your Grant Agreement and in your Project Summary Sheet

In most cases, you are not permitted to begin work on your project until these requirements have been satisfied

Pay close attention to what the requirements are NOW so you don't have to make changes later

If you start project work without approvals in place, you risk forfeiting your grant





# COMPLIANCE AND EASEMENT REVIEW

Nothing listed in the “Easement and Preservation Requirements” field of your Project Summary Sheet?

- This means MHT’s Compliance team does not need any additional information about your project
- You may proceed with the project. However, if your project scope changes, they may need to review the changes

If additional information was requested, or requirements were listed:

- Do not begin work on our project until the proposed work has been approved by MHT
- Get in contact with Beth Cole, Administrator, Project Review and Compliance at [beth.cole@maryland.gov](mailto:beth.cole@maryland.gov).
- If your project includes terrestrial archaeological investigations or work in cemeteries contact State Terrestrial Archaeologist, Dr. Zachary Singer, at [zachary.singer@maryland.gov](mailto:zachary.singer@maryland.gov).

**See MHT's website for guidance on the review process, how to prepare a submittal, and copies of the Project Review form: <https://mht.maryland.gov/Pages/projectreview/project-review.aspx>**



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# COMPLIANCE AND EASEMENT REVIEW

Additional information that may be required for a Compliance Review include:

- Maps – Google, USGS
- Site Plans
- Descriptions Of Work
- Other



HO-161  
Henry & Julia Warfield Farm  
6044 Trotter Road  
Site Plan



# COMPLIANCE AND EASEMENT REVIEW

## Preservation Easements:

- Easement requirements will also be listed under “Easements and Preservation Requirements”
- These are legal contracts between the property owner and the State of Maryland
- Protects against changes to the property that are inconsistent with the preservation of the property
- The State has the legal authority and responsibility to enforce the easement through:
  - Inspections
  - Review and approval of changes
  - If terms not upheld – reversal of unapproved work, other penalties



# COMPLIANCE AND EASEMENT REVIEW

What if you have an EXISTING MHT Easement, or the “Easement and Preservation Requirements” field on your Project Summary Sheet says you are required to convey a NEW Easement to MHT?

- Do not begin work on our project until the proposed work has been reviewed and approved by MHT.
- Contact Carolyn Fifer, MHT Easement Administrator, at [mht.easements@maryland.gov](mailto:mht.easements@maryland.gov) to start the process of seeking review.
- For NEW Easements, you must complete all the steps to “convey” the easement before final payment.

If you have an Easement but nothing is listed in your “Easement and Preservation Requirements” field?

- The work proposed in your application does not require Easement review.
- However, if your project scope changes, they will need to review the changes.



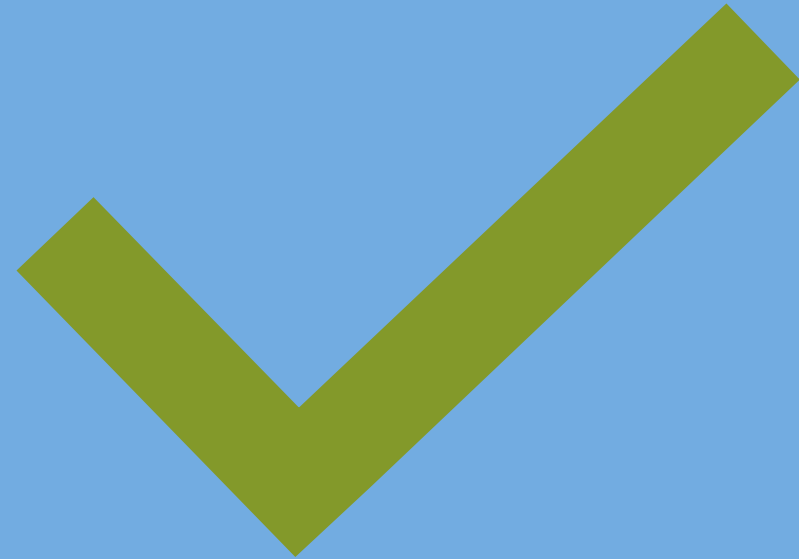
# REQUIRED LAST STEP: QUIZ

<http://tiny.cc/MHAAOrientationQuizFY25>

To certify that you have completed this mandatory orientation session

Please complete and submit the brief quiz (only 6 questions!) as many times as needed until you reach 100%.

**Complete by August 31, 2024**



DEPARTMENT OF PLANNING  
MARYLAND HISTORICAL TRUST



# ANY QUESTIONS? PLEASE CONTACT US!



[mht.maryland.gov/heritageareas](http://mht.maryland.gov/heritageareas)

[MHT.grants@maryland.gov](mailto:MHT.grants@maryland.gov)

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