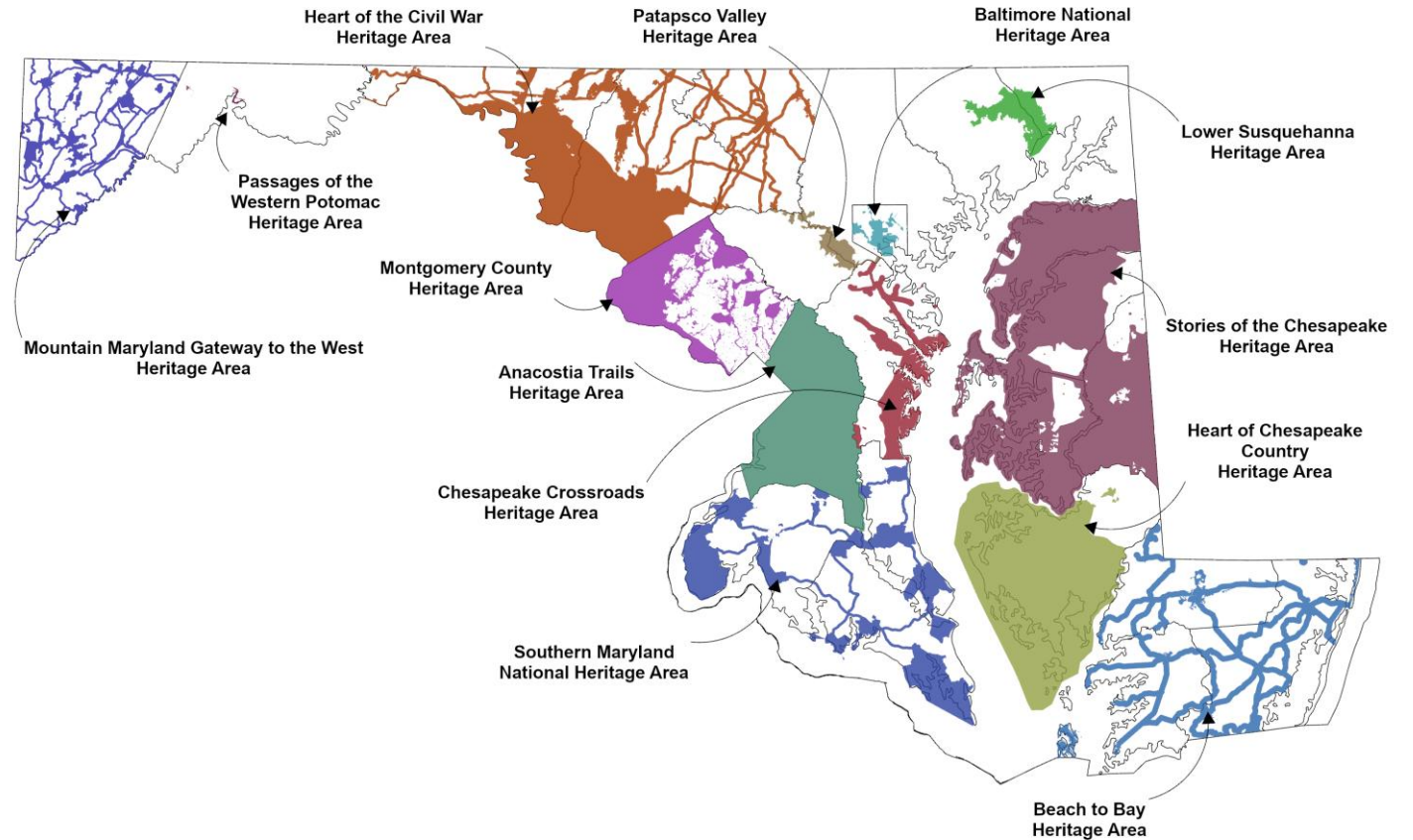




Fiscal Year 2027 Orientation for Grantees



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INTRODUCTIONS

Maryland Heritage Areas Program Staff

One will be your project monitor:

Ariane Hofstedt, Program Director

Andrew Arvizu, Program Officer

Martha Waldron, Program Officer

Maryland Historical Trust Staff

Assist with Processing Grant Agreements and
Grant Payments:

Sabrina Roundtree, Assistant Grants Manager

Caitlin Swaim, Assistant Grants Manager



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TODAY'S AGENDA

1. Four Steps to Receiving First Payment
2. Project Summary Sheet
3. Grant Agreement and SDAT
4. Project Budget and Scope of Work
5. Types of Match Allowed
6. Easement and Preservation Requirements
7. Acknowledgment of MHAA Funding
8. Project Timetable and Reporting
9. Amendments
10. Procurement
11. Payments and Direct Deposit
12. Financial Documentation and Record Retention
13. Financial Spot Check

All information contained in this orientation can also be found in the FY27 MHAA Grants Manual found here:

[Maryland Heritage Areas Program Project Grants | Maryland Historical Trust](#)

And link to a short quiz at the end!



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4 STEPS TO RECEIVING FIRST PAYMENT

- STEP 1: Grantee completes Project Summary Sheet via grants portal
Due: August 31, 2026
- STEP 2: Grant Agreement generated and sent to grantee via Adobe Sign
As soon as: September. 2026
- STEP 3: Grant Agreement signed electronically by all parties and executed
- STEP 4: First payment of 50% of award sent approx. 30 days after signing



PROJECT SUMMARY SHEET: A FEW HELPFUL TIPS

- Complete this mandatory orientation and quiz beforehand
- Confirm or correct information so everything is accurate
- Note any easement and/or preservation requirements or special conditions
- Use checkboxes to indicate property owner consent and if you anticipate having single purchases more than \$50,000
- YOU MUST REVIEW AND SUBMIT, EVEN IF THERE ARE NO CHANGES!



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GRANT AGREEMENT and SDAT

- Legal contract
- Read entire document and use as reference
- Authorized signatory agreeing to terms and conditions
- Check the details:
 - Scope of Work
 - Project budget and match requirements
 - Project timetable
 - Easement and Preservation Requirements (if applicable)
- Good standing with State Department of Taxation and Assessments (SDAT)
Check status here: <https://egov.maryland.gov/businessexpress/entitysearch>



PROJECT BUDGET and SCOPE OF WORK

SAMPLE Project Budget (does not include Other Project Costs)

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

SAMPLE Scope of Work:

The Project involves 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.



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TYPES OF MATCH ALLOWED

- Staff and volunteer time for work directly related to the project
- Donated (or discounted) professional services and materials
- Cash purchases and expenditures that were paid for using non-state funds

Other Project Costs (non-state funds): everything else above the required 1 to 1 match – do not count towards the match but should be tracked and reported



EASEMENT AND PRESERVATION REQUIREMENTS

- MHT reviews project to assess effects on National Register and National Register-eligible historic properties and determines:
 - An Easement or Preservation Agreement is not required
 - An Easement/Preservation Agreement is required
 - An existing Easement/Preservation Agreement satisfactory or needs to be modify
 - Special Conditions are required (additional coordination needed, such as archaeology review)
- Grantee requirements listed in Grant Agreement and Project Summary Sheet
- Do NOT begin work until requirements have been approved
- More info on MHT's website at mht.maryland.gov under the "Project Review" and "Planning and Protection" sections.



ACKNOWLEDGEMENT OF MHAA FUNDING

- Grantees must acknowledge MHAA's support via logo
- and/or acknowledgement statement
- Get logo and approval from project monitor first
- On any public pronouncements or materials



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.

Also acknowledge local heritage area



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PROJECT TIMETABLE AND REPORTING

Grant period approx. 2 years long (can be less)

Project Start Date: July 9, 2026 (same for all grantees)

Reports and Due Dates:

- Mid-Project Report (approx. halfway through project)
- Project End Date (all deliverables completed and funds spent)
- Final Report Due Date (due approx. 2 months after project ends)



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AMENDMENTS

- Amendments are allowed for changes to your scope of work or timetable
 - Staff approve minor changes such as extension to timetable
 - MHAA approves larger changes such as additions to scope of work
- Email your project monitor to initiate an amendment
- Be prepared to:
 - Provide information about the status of your project
 - Explain why you need the amendment
 - What changes to the timetable and/or scope of work you would like to request



PROCUREMENT

All grantees must follow procurement guidelines:

- Ensure costs for goods and services are reasonable and customary
- Retain documentation for three years after Final Report
- Report on progress and final results

Non-Profit organizations with single purchases:

- ***NEW* More than \$5,000 but no more than \$50,000 (\$5,001-\$50,000): Strongly encouraged obtain at least 2 oral or written bids**
- **More than \$50,000: Written bids from at least 3 vendors must be obtained**

Government organizations: Follow your normal procedures

Sole-Source Procurements: Are allowed only when competitive procurement impractical



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PAYMENTS and DIRECT DEPOSIT

- Project grants receive 3 payments
 - 50% of grant after signing Grant Agreement
 - 25% at time of Mid-Project report if adequate work has been completed
 - 25% after Final Report approved
- Use payment request forms attached to reports
- Received within approx. 30 days after approval
- Must be in good standing with SDAT to receive payment

We STRONGLY suggest signing up for direct deposit with the Office of the Comptroller

- Link: <https://www.marylandtaxes.gov/divisions/gad/eft-program.php>
- Call: (410) 260-7813, and select option 3
- Or email GADCSC@marylandtaxes.gov



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FINANCIAL DOCUMENTATION AND RECORD RETENTION

- Records of all grant and match expenditures that align with your approved Scope of Work
MUST KEEP FOR 3 YEARS AFTER FINAL REPORT
- Acceptable forms of documentation include:
 - Invoices, receipts, bids, vouchers, contracts from vendors
 - Staff timesheets, paystubs, volunteer time logs, QuickBooks and other accounting system printouts (for personnel expenses serving as match)
- Procurements of more than \$50,000 - 3 bids and selection process/criteria
- Sole source procurement - written justification
- Donated or discounted goods, services and/or equipment (aka "in-kind") - written value at time of acceptance with signature
- Property acquisition - wire docs, proof of title work, insurance, purchase agreement

SAVE DOCS AS YOU GO – DON'T WAIT UNTIL THE END!



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FINANCIAL SPOT CHECK

A minimum of seven grantees will be selected

- 2 non-capital projects
- 2 capital projects
- 3 management grants to heritage area management entities

Participants notified near their Project End Date, or when submit Final Report .

If selected, grantees need to:

- Provide detailed financial documentation of their grant and match expenses
- ***NEW* Financial Spot Check Expense Form**
- Submit documents electronically via email to MHT grants staff
- Include bid documents and sole source justifications, if applicable
- Ensure that all documentation adds up to the total amount spent and reported



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REQUIRED LAST STEP: QUIZ

[FY27 MHAA Orientation Quiz - Google Forms](#)

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, 2026



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ANY QUESTIONS? PLEASE CONTACT US!



Maryland Heritage Areas Program | Maryland
Historical Trust

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