



Maryland Heritage Areas Program

FY 2027 GRANTS MANUAL

Administered by the
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Getting Started

Congratulations! You have been awarded a grant from the Maryland Heritage Areas Program which is housed administratively in the Maryland Historical Trust (MHT) and overseen by the Maryland Heritage Areas Authority (MHAA), an independent unit of government that operates in the Maryland Department of Planning (MDP).

The Maryland Heritage Areas Program awards grants to organization's completing projects within Maryland's 13 heritage areas. These projects highlight Maryland's diverse heritage, enhance local communities, and promote tourism, sustainability, and economic development.

Each of Maryland's 13 heritage areas are certified by MHAA and managed locally by an organization with its own staff and board. Through the Maryland Heritage Areas Program, heritage area management entities receive annual management grants that help them fulfill the vision and results of the program at the local level.

Together, the program, MHAA, MHT, the state-certified heritage areas, and local partners such as yourself, support the economic well-being of Maryland's communities by creating and promoting place-based experiences for visitors and residents alike.

Orientation Session and Quiz

The first two items you must complete are the orientation training session and quiz. Both are offered online; the orientation session is provided via a pre-recorded video, and the quiz is to be completed using a Google Form. **All grant recipients MUST complete the orientation session and quiz online by August 31, 2026.**

The link to this year's orientation session can be found [here](#).

The link to this year's quiz can be found here: [FY27 Maryland Heritage Areas Program Orientation Quiz - Google Forms](#)

Project Summary Sheet

The next item to complete is the Project Summary Sheet which can be accessed via your account in the [grants portal](#).

Under your approved FY27 grant, click the "Maryland Heritage Areas Program Project Summary Sheet." The status will show as "not submitted" until you complete it. Note who your project monitor is, as that is the person you will communicate with while working on your project. **You MUST submit the Project Summary Sheet, even if there are no changes, by August 31, 2026;** without this form we cannot begin to draft your Project Grant Agreement (capital and non-capital project grants only)*. The earlier you complete this step; the sooner you receive your Project Grant Agreement electronically for signature followed by your first payment.

***FOR HERITAGE AREA MANAGEMENT ENTITIES ONLY:** Instead of a Project Grant Agreement,

an amendment to your Cooperative Agreement will be used to execute your Management Grant. Throughout this document, this will be referred to as “Amendment to Approve Management Grant.”



Application ID: 2120044

FY27 Maryland Heritage Areas Program ● Approved

[View Guidelines](#)

Martha Waldron on behalf of Awesomest House Museum in the World

Project Title: Test Project 2027

Requested Amount:
\$55,800.00 USD

Maryland Heritage Areas Program Eligibility Quiz	✔ Submitted on Dec 11, 2025
FY27 Maryland Heritage Areas Program Intent to Apply Form	✔ Submitted on Dec 11, 2025
FY27 Maryland Heritage Areas Program Project Grant Application	✔ Submitted on Dec 16, 2025
Maryland Heritage Areas Program Project Summary Sheet	⚠ Not started

Created on Dec 11, 2025

[Manage](#) ▾

IMPORTANT: Be sure to indicate at the top of the Project Summary Sheet that you have completed the mandatory online orientation and quiz by selecting “TRUE.” This is a required field, and you cannot submit your Project Summary Sheet without completing it.

Take a few minutes to review the information on the sheet to make sure it is still up to date and accurate. If you need to request changes to the Scope of Work or Timetable, or any other information on the sheet, you can do so in the “Additional Information or Changes” field.

You will see the Project Start Date and Project End Date listed. Any expenses incurred outside of those two dates are not eligible for grant and match funds.

- The start date is the day you are allowed to begin incurring grant and match expenses and will be the same (July 9, 2026) for every project that is funded.
- The end date, when you expect to finish your project, is typically two years from the start date but can be less and the exact date can vary project to project.

Please pay special attention to the section titled “Easement and Preservation Requirements.” If there are requirements or special conditions listed, you need to make sure you address them immediately. Some may have a deadline associated with them, others must be completed before you begin work on the project. For more information, see the “MHT Project Review” section below.

Please note: If you anticipate having single procurements that are more than \$50,000, please indicate so on the Project Summary Sheet via the checkbox provided.

See Appendix A: Sample Project Summary Sheet

Disable Heritage Area Director Access to Grant

For project grantees, if you shared access to your application in the grants portal with your local heritage area executive director during the review process and have not already disabled them from having access to your grant, please do so immediately.

- Go to your account in the grants portal, locate your grant, and click the "Manage" button, followed by the "Manage applicants" button.
- Then locate the heritage area director's email and click the red X to remove them from the application.

Executing Your Grant and SDAT

Once you have completed your Project Summary Sheet in the grants portal and any required easement or preservation requirements, MHT and Maryland Heritage Areas Program staff will begin generating your Project Grant Agreement, or Amendment to Approve Management Grant. This is the legal contract between your organization and the State of Maryland that will execute your grant. Be sure to review the entire document with your team, paying special attention to the Scope of Work, Project Budget, Project Timetable, and Easement and Preservation Requirements of your grant.

As a result of the volume of grants that MHAA approves, please be aware that you may not receive your Project Grant Agreement, or Amendment to Approve Management Grant, for signature until late fall.

The Project Grant Agreement or Amendment to Approve Management Grant must be signed by someone who is legally authorized to enter into contracts for your organization. If you are not sure who is legally authorized, check your organizational bylaws.

For grantees that are nonprofit organizations, 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 of the nonprofit organization that has have 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 it is not clear that the representative has the legal authority to sign the Project Grant Agreement, additional documentation will be required.

To finalize your Project Grant Agreement, or Amendment to Approve Management Grant, your organization must be in good standing with the State Department of Assessment and Taxation (SDAT), or qualified to do business in Maryland if your organization is located outside the state. If you are not in good standing, it is usually an easy fix (and can sometimes be done online), but you will need to resolve the issue before we can execute your grant. You can check your status at <http://www.dat.maryland.gov/> by going to "Online Services" and clicking "Search the Business Database" in the left sidebar.

Scope of Work

Your Scope of Work (also referred to as “Project”) as listed in the Project Grant Agreement, or Amendment to Approve Management Grant, conveys exactly what work can take place as part of your grant. The Scope of Work is based on the project budget and line items you provided in your original application that were approved for funding. It takes the form of a narrative list of budget items in the following format:

The Project involves ... (a brief description of the project). The Grant and the Match may support the costs of ... (items that can be grant-funded or match funded). The Match may also support ... (items that may only be funded with matching dollars).

Please review the list of items in your Scope of Work carefully as 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.

Over the course of your grant, you may only spend grant funds and matching funds on items listed in your Scope of Work. If you wish to add or remove items from your Scope of Work, you must reach out to your project monitor in advance. If you don’t get prior approval, you risk not having those expenditures covered in the grant project.

Project Budget: Grant, Match and Other Project Costs

The Project Budget section of the Project Grant Agreement, or Amendment to Approve Management Grant, is based on the budget you submitted with your application and the line items that were approved for funding. It does NOT include a detailed itemized budget; only a summary of the following:

- MHAA Grant (award amount)
- Match (required one-to-one grantee contribution; non-state funds only)
- Total MHAA Project Budget (combined total of MHAA grant and match; does NOT include “other project costs”)

Other project costs are any additional costs incurred beyond your grant and one-to-one match requirement that are paid for using non-state funds only. You may have listed these in your application budget, or they may occur after award. Either way, you should track them alongside your grant and match funds.

Matching funds can be made of any combination of cash and in-kind contributions. In-kind contributions are defined as any professional materials or services that are donated or discounted to the project, as well as volunteer time for work associated with the project.

Grantees are strongly encouraged to devise their own consistent detailed method for tracking each of the expense line items in their project budget (e.g. Excel spreadsheet). This includes approved grant and matching funds listed in the Scope of Work, as well as any other project costs

(non-state only). All of which will need to be reported when requesting payment of funds. For more information, “Mid-Project and Final Reports” and “Requests for Payment” sections below.

During the grant period, grantees are allowed flexibility to move funds between the approved line items and spend any amount of money needed on the items listed in your approved Scope of Work, provided you:

- Fulfill your one-to-one match requirement
- Don’t spend grant funds on match-only items
- Do not exceed your approved total project budget (grant and match funds combined)
- Spend funds on all the items in your Scope of Work
- Do not spend grant or match on funds outside the approved Scope of Work
- Successfully complete your project and deliverables

Project Timetable

The Project Timetable listed in your Grant Agreement includes a Project Start Date; the Mid-Project Report Due Date; the Project End Date; and the Final Report Due Date.

The Project Start Date is the date the grant was awarded and approved by the Maryland Heritage Areas Authority and is the first day you can incur grant and matching contribution expenses. Even if your project will not start right away, your Project Start Date stays the same. For all FY27 grants the Project Start Date is July 9, 2026.

The Project End Date is the last day you can incur grant and matching contribution expenses. Any expenses incurred after this date are ineligible. If at any point you think you will not be able to finish your project or incur all expenses by the Project End Date, email your project monitor to request an extension. Project End Dates will vary based on the circumstance of each project and grantee; however, the default project completion timeframe for a typical grant is two years.

For more information on the “Mid-Project and Final Reports” and “Requests for Payment” sections below.

MHT Project Review: Compliance and Easement

For project grants, prior to award your project was reviewed by the MHT Project Review and Compliance staff and the MHT Easement staff to assess its effect on National Register and National Register-eligible historic properties. This is required of all projects that receive Maryland state funding, including Maryland Heritage Areas Program grantees, under *Sections 5A-325 and 5A-326 of the State Finance and Procurement Article*.

For more information, go to: <https://mht.maryland.gov/Pages/projectreview/project-review.aspx> and <https://mht.maryland.gov/project-review/understanding-state-and-federal-project-review->

[process.](#)

If it was determined that additional information is needed to complete the review of your project's effect, that information is listed under "Easement and Preservation Requirements" on your Project Summary Sheet and the "Easement and Preservation Requirements" section of your Project Grant Agreement.

If you need to provide MHT with additional information, you must do so prior to beginning work. If MHT Easement staff have required conveyance of an easement or a preservation agreement as a condition of your grant as a result of the project review, you must adhere to those requirements or risk forfeiting your grant award. After notification of award, if you wish to make substantial changes to the project's approved Scope of Work, you must speak to your project monitor to determine if MHT Project Review and Compliance staff and/or Easement staff need to review your project again.

If your project takes place on a property on which MHT holds an existing easement or preservation agreement, you must ensure that you have approval from the Director of MHT before starting the project and receiving your first grant payment. If you have not already done so, be sure to submit a "Historic Preservation Easement Program Change/Alteration Request Application" form with as much detail as possible. The form is available on the [MHT website](#). You cannot start the project or make any changes to the historic property/building until MHT has approved your Change/Alteration Request Application.

If the property where your project is taking place does not currently have an easement on it, but a preservation easement is a condition of your grant award, you must convey the easement to MHT before receiving your final grant payment. In addition, you must seek approval from the MHT Director for all proposed work, prior to beginning that work, as if the easement were already in place. If an easement is required for your project, you will receive a complete Easement Conveyance Packet from MHT Easement staff. General information about easement review can be found on the [Easement webpage](#).

See Appendix B: Easement Requirements for additional information.

Policies

Indirect Costs for Nonprofit Organizations with Non-Capital Projects

Indirect costs are an allowable grant-funded expense for non-capital project grants awarded to nonprofit organizations. Indirect costs are those operating costs that are for the joint benefit of both the grant project and your other organizational activities. Indirect costs are frequently referred to as overhead, operating, or administrative costs, and can include rent, utilities, salaries, personnel costs, and professional service fees.

Maryland law and MHAA's policy regarding indirect costs allow nonprofit organizations¹ who are completing Maryland Heritage Areas Program non-capital projects to elect to include indirect costs in their grant's Scope of Work. Indirect costs are limited to 15% or less of the total grant award amount, and the grantee must still be able to complete the entire project using the remaining funds.

If you choose to include indirect costs in your budget, your grant amount will not change. Indirect costs must come out of grant funds, not your matching contribution. If your approved Scope of Work does not currently include indirect costs and you would like to add them, please contact your project monitor to discuss a budget amendment. Please note that you are required to retain financial documentation for indirect costs for up to three years on indirect costs and will be required to submit them for review if you are selected for financial spot check. For more information, see "Financial Documentation and Records Retention" and "Financial Spot Checks" sections below.

Procurement

You are expected to ensure that the costs for goods and services obtained to carry out the project are reasonable and customary for the type of work performed and materials purchased. You must follow the procurement guidelines for your type of organization, as detailed below.

Government agencies: Government organizations should follow their normal procurement procedures and must be able to document that applicable procurement procedures were followed, if requested by MHT or Maryland Heritage Areas Program staff.

Nonprofits: Nonprofit organizations should use a procurement process that allows you to obtain project goods and services at reasonable and customary prices and must be able to document that expenditures are reasonable and customary, if requested by MHT or Maryland Heritage Areas Program staff.

Procurements more than \$5,000 but not more than \$50,000 (\$5,001-\$50,000): You are strongly encouraged to obtain oral or written bids from at least two vendors for any goods and services.

Procurements more than \$50,000: If costs for goods or services from any one vendor are expected to exceed \$50,000 written bids from at least three vendors must be obtained. You must be able to provide documentation that at least three written bids were obtained, if requested by MHT or Maryland Heritage Areas Program staff.

When bids are obtained, grant recipients are not required to select the lowest bid but must be able to provide documentation on why a vendor other than the low bidder was selected, and what

¹This does not include grants to heritage area management entities, or grants to nonprofit organizations that were awarded before October 2018. Alternatively, if a nonprofit organization completing an MHAA Non-Capital has a negotiated federal rate, the organization must use that rate.

criteria other than the most favorable bid price were considered.

Sole-source procurement of goods and services should not be utilized unless the grantee can demonstrate that competitive procurement is impractical because only one product or service vendor can meet specific project requirements. As with all procurements, sole source expenditures must be reasonable and customary for the type of goods and services being obtained. If requested by MHT or Maryland Heritage Areas Program staff, grant recipients must be able to justify the sole-source procurement and document that its expenditures are reasonable and customary for the goods and services obtained.

If you have procurements more than \$50,000, you will be asked to provide an update on the bid process in the Mid-Project Report and results of the bid process in the Final Report. This includes providing a summary of bids obtained (not the bids themselves; just summaries). In addition, you will be asked to affirm in the Final Report, via a check box and signature, that for procurements more than \$50,000 you obtained and reviewed written bids from at least three vendors and retained documentation in your records.

For grantees that are selected for financial spot check, bid documents and sole source justifications must be included in the financial documentation provided to MHT or Maryland Heritage Areas Program staff. For more information, see “Financial Documentation and Records Retention” and “Financial Spot Checks” sections below.

Acknowledgment and Review of Draft Materials

It is important to **acknowledge the support of MHAA when talking about your grant-funded project, and when producing materials** that were supported by your grant. At a minimum, you should include either the MHAA logo, or the following statement, without any alterations:

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.

MHAA’s logo can be downloaded here in the “Resources for grantees” section:

<https://mht.maryland.gov/planning-protection/maryland-heritage-areas-program/maryland-heritage-areas-program-project-grants>

Email your project monitor if you require a higher quality version.

Acknowledgment of MHAA support applies to:

- Printed materials (brochures, signage, etc.)
- Websites
- Construction projects (donor panel, trail signs, etc.)
- Other projects

You will be asked to include evidence of acknowledgement in your Final Report.

Please also remember to **acknowledge MHAA support when you are speaking to the press**, issuing press releases, or discussing the project with the public. If you aren't sure how to incorporate acknowledgement into your project, contact your project monitor to discuss your options. Don't forget to also **acknowledge your local heritage area** management entity by including their logo as well.

Prior to producing acknowledgement materials, you **must obtain approval from your project monitor**. They will review them to ensure that you have properly acknowledged MHAA support, and that the materials are acceptable based on your approved Scope of Work. This includes, but is not limited to, drafts of brochures, wayside panels, web pages, video scripts, advertisements, press releases, and signage.

Be sure to give your project monitor at least 2 weeks to review the materials before you need to finalize them.

Amendments and Extensions

If you need more time to complete your project or to add/remove items from your Scope of Work, you may request an amendment. Requests are considered on a case-by-case basis and must be submitted in writing via email to your project monitor at least 2 weeks prior to your Project End Date. Please provide the following information:

1. Fiscal year the grant was awarded
2. Name of the grant project
3. The reasons for requesting an extension/amendment
4. Proposed revised Scope of Work (if applicable) and any corresponding changes to the Project Budget (if applicable)
5. Proposed revised Project Timetable (if applicable), including the new Project End Date that you are requesting. Generally, extensions of more than 1 year will not be approved but may be considered.

If your project monitor determines that an amendment to your Scope of Work or timetable extension is warranted, they will work with you to finalize the details of the changes that are needed. If approved, you will receive an email notifying you of your extension and/or amendment. For changes to Timetables, **you will have 10 days in which to reject the extension. After that, it is considered accepted.** Note that if your project monitor has not heard from you and your Project End Date is approaching, they may proactively implement an extension.

If the changes needed are major (adding major new elements to the Scope of Work), approval of those changes will need to be approved by the Maryland Heritage Areas Authority directly at their

next quarterly meeting. Your project monitor can help you with that process.

The **timely completion of grant projects is critical** not only for the development of place-based experiences and tourism products across Maryland, but to the continued support of the Maryland Heritage Areas Program by our elected officials. Failure to complete grant projects by the date specified in the Project Grant Agreement, or Amendment to Approve Management Grant, by the date specified in an approved grant extension is a default under the Project Grant Agreement, and may result in cancellation of the grant and/or your repayment of disbursed grant funds. Your assistance in closing or extending any soon-to-be overdue grants with your organization is appreciated.

Insurance

You are **required to maintain certain levels of insurance** coverage in relation to your grant-funded project. See **Appendix C: Insurance Requirements** for details on those requirements. You must provide proof of insurance if requested by MHT or Maryland Heritage Areas Program staff.

Mid-Project and Final Reports

You will be required to submit a **Mid-Project Report and a Final Report** through the online grants portal: <https://bbgm-apply.yourcausegrants.com/apply/auth/signin>. If you are having problems accessing your account or finding your report forms, please contact your project monitor.

A Mid-Project Report must be submitted at roughly the mid-point of your project. Once the project is complete, and all the work is finished, you will also need to submit a Final Report. **The deadlines for both reports are listed under Project Timetable in your Project Grant Agreement or Amendment to Approve Management Grant.** If you cannot complete a report on time, be sure to let your project monitor know, and request an extension if you are behind schedule.

In addition to answering the questions on the report forms, including information about your project's impact, you will also need to **upload supporting materials for your reports**, including photographs of the work, drafts and final versions of all work products, and other documentation that the project is underway at mid-point, and completed at the end point.

If you have procurements of more than \$50,000 for your project, you will be asked to provide an update on your bid process in the Mid-Project and results in the Final Report. This includes providing a summary of bids obtained (not the bids themselves; just summaries). In addition, you will be asked to affirm in the Final Report, via a checkbox and signature, that for procurements of more than \$50,000 you obtained and reviewed written bids from at least three vendors and retained documentation in your records.

If your grant is selected for financial spot check, financial documentation and an additional

Financial Spot Check Expense Form will also need to be provided at time of Final Report. See “Financial Spot Checks” section below.

Incomplete reports will be returned. Failure to submit a satisfactory Final Report and the supporting documentation requested by MHT or Maryland Heritage Areas Program staff is a default under the Grant Agreement that may result in cancellation of the grant and/or your repayment of disbursed grant funds.

Requests for Payments

The Request for Payment form can be found on the second page of the Mid-Project and Final Reports in the grants portal. Grantees are NOT required to report against individual budget line items (as in previous years), instead you will be asked to provide the following totals and information:

- **Total Grant Funds Expended to Date:** this is the amount of MHAA grant funds you have spent against approved line items in the Scope of Work.
- **Total Match Funds Expended to Date:** this is the amount of non-state match funds you have spent against the approved line items in the Scope of Work.
- **Total Other Project Costs Expended to Date:** any additional non-state project costs incurred that are not paid for by your grant and the one-to-one match.
- **Payment Request Amount:** this is the amount of funds you are requesting to be disbursed (typically 25% of your grant award).
- **Name, Title, and Date:** of authorized signatory submitting the request certifying that the request is made in accordance with the terms and conditions of the Project Grant Agreement

IMPORTANT: Be sure to check the box formally certifying that the information you provided is correct and within your approved Scope of Work (the box is located directly below where you will be indicating the amount you are requesting).

In addition to the above information, the following items should pre-populate on the form:

- Tax ID and Legal Name of Organization
- Maryland Heritage Areas Program project monitor Name and Email
- Approved Total Grant Amount
- Approved Total Match Amount
- Approved Other Project Costs

There is also a “State Use Only” section at the bottom of the page that will be completed by MHT or

Maryland Heritage Areas Program staff.

If you decide not to request payment at time of Mid-Project Report, you do not need to complete the Request for Payment form. You may request funds in the future by reaching out to your project monitor who will re-open the Request for Payment form for resubmission.

For projects involving **property acquisition**, grantees have two options: 1) get reimbursed for the property purchase after the purchase is complete, or 2) make arrangements with your project monitor to have the payment issued to the title company via wire transfer. If you choose to have payment issued via a wire transfer to the title company, you will be required to provide Maryland Heritage Areas Program staff with copies of: the appraisal, the title commitment for a policy of owner's title insurance, evidence of property insurance and a certificate of liability insurance, fully executed purchase agreement, a copy of the proposed deed, and if applicable, MHT will provide a copy of the final easement to recorded at closing, before the wire transfer will be executed. This process can take several months to complete, please contact your project monitor to discuss realistic timeframes and due dates.

See Appendix D: Sample Request for Payment form.

Payment Schedule

All grantees must be in good standing with the SDAT to receive payments. If you are not in good standing, your payment will not be disbursed until you resolve your issue with SDAT and return to good standing. We recommend checking your status prior to submitting a request for payment at <http://www.dat.maryland.gov/> by going to "Online Services" and clicking "Search the Business Database" in the left sidebar.

Once Requests for Payment are approved by MHT or Maryland Heritage Areas Program staff, payments to grantees are generally processed within approximately 30 days.

Please note, project grants and management grants to heritage area management entities have different payment schedules. Please see below for details.

Project Grants

Project grantees will receive three payments, or disbursements. The first payment is typically 50% of your grant award, and the second and third payments are typically 25% each. If you feel that your payment schedule may require alteration, please reach out to your project monitor who under certain circumstance can alter the number or percentage of payments.

Payment 1: After the Project Grant Agreement has been signed by all parties and executed ☐ and, your first payment will be processed. Typically, you will receive 50% of your total award in your first payment.

Payment 2: To receive the second payment, you must certify in the Request for Payment section of your Mid-Project Report that you have spent 50% of your total project costs (which is the grant and matching amounts combined). Typically, you will receive 25% of your total award in your

second payment. This form can be accessed via the grants portal here: <https://bbgm-apply.yourcausegrants.com/apply/auth/signin>.

Payment 3: The third payment is considered reimbursable, meaning you must certify in the Request for Payment section of your Final Report that you have incurred all remaining project expenses to request the third and final payment. Your final payment will be the balance of funds available (typically 25%), based on your final expenditures, and will not be issued until all project expenses have been incurred, all project deliverables are finished and your Final Report has been submitted and approved by MHT or Maryland Heritage Areas Program staff. This form can be accessed via the grants portal here: <https://bbgm-apply.yourcausegrants.com/apply/auth/signin>. In some cases, additional financial documentation will be requested at time of Final Report, and the third payment will be held until this is received and approved. For more information, see “Financial Documentation and Records Retention” and “Financial Spot Checks” sections below.

For your second and third payments, Maryland Heritage Areas Program staff reserves the right to withhold payment of grant funds if you have not incurred sufficient project expenditures at the time you submit a Mid-Project or Final Report and corresponding Request for Payment forms. Alternatively, grantees can also choose not to request payment at the time of Mid-Project Report by simply not completing the Request for Payment form. In these instances, grantees can request a payment at a future time by reaching out to your project monitor who will re-open the Request for Payment form for resubmission.

Management Grants

Management grants, awarded to heritage area management entities only, will typically be disbursed in two payments. The first payment, 80% of grant award, is processed after the Amendment to Approve Management Grant has been signed by all parties and executed.

For the second payment, 20% of grant award, management entities are required to submit a Final Report and any requested documentation. Maryland Heritage Areas Program staff reserves the right to withhold payment of grant funds if you have not incurred sufficient project expenditures at the time you submit a Request for Payment. If you feel that your payment schedule may require alteration, please reach out to your project monitor, who, under certain circumstance, can alter the number or percentage of payments.

For more information see Section 8 “Payment of Annual Grants” of the Cooperative Agreement.

Financial Documentation and Records Retention

Grantees are required to retain financial documentation of grant expenditures for three years after either the date of grantee’s final expenditure of grant funds or the termination of their Project Grant Agreement, whichever is later. MHT or Maryland Heritage Areas Program staff can request this documentation at any point in the project Timetable or three years after Final Report as part of a financial spot check (see next section) and/or subject to state audit.

Failure to submit documentation upon request is a default under the Project Grant Agreement, that could result in cancellation of your grant and/or your repayment of disbursed grant funds. It is critical that you retain these records and provide them upon request.

For all expenses included in grantee's approved Scope of Work, grantee must retain records that show proof of all project expenditures, both grant-funded and matching funds. If there are also other project costs from non-state sources supporting the project, it is recommended that you retain records that show proof of those project expenditures as well.

For **cash expenses**, retain copies of your invoices, receipts, timesheets, and/or contracts supporting the breakdown of cost in your approved Scope of Work. Documentation should show what was purchased or funded, when it was purchased, or when the work was completed, and how much it cost. QuickBooks and other accounting system printouts are accepted as proof of expenditure for payroll expenses.

For procurements of more than \$50,000 you must retain the three required written bids as well as the documentation on why a vendor other than the low bidder was selected and what criteria other than the most favorable bid price were considered. For sole source procurements, grantees must retain documentation that justifies the sole-source procurement and that expenditures were reasonable and customary for the goods and services obtained.

For donated or discounted goods, services and/or equipment (such as paint, photography, architectural fees, etc.) the value must be documented in writing at the time of your acceptance of the donation/discount, by a voucher, invoice, or other official document. The document should reflect the value of the donation/discount based on the reasonable market rate cost of the goods, services or equipment, and must be signed by the person or company giving the donation/discount. Such goods, services or equipment are also referred to as "in-kind."

This documentation must be retained for three years after either the date of grantee's final expenditure of grant funds or the termination of their Project Grant Agreement, whichever is later.

If included in your approved Scope of Work, **volunteer time** contributions must also be documented by a timesheet or work spreadsheet that includes the name of the volunteer, the work completed, the date(s) of their service, the hours volunteered and the hourly rate used to calculate the value for the donated time. The value of unpaid volunteer time should be calculated by using the current Maryland hourly rate as determined by Independent Sector (<https://independentsector.org/wp-content/uploads/2026/04/Value-of-Volunteer-Time-2026-Report.pdf>). This rate changes annually. You should check the rate at the start of your project and use the same one throughout the life of the project.

For **property acquisition**, you should retain a copy of the wire documentation, proof of title work, insurance, and the purchase agreement.

If you are asked to provide financial documentation, either as part of financial spot check or at any time during your grant period, you will only be asked to provide proof of expenditure, you do NOT need to submit proof of payment (i.e., copies of bank statements, cancelled checks, and/or credit card statements). As standard accounting practice, however, we encourage you to also retain

payment documentation for your records.

Financial Spot Checks

A minimum of seven grantees each fiscal year will be selected for financial spot check and required to provide detailed financial documentation of their expenses, as listed in the previous section. If selected, grantees will need to submit the requested materials as part of their Final Report. Participants will be notified by a member of MHT's grant staff near their Project End Date, or upon receipt of their Final Report. All requested materials should be provided electronically via email to that MHT grant staff member.

Starting in FY27, the selection criteria for financial spot check participants include random selection, risk assessment, materiality, and, if applicable, prior compliance. Projects that will be spot checked include:

- A random selection of at least two non-capital project grants under \$50,000 (may include first-time grantee or returning grantee)
- A random selection of at least two capital project grants over \$50,000 (may include first-time grantee or returning grantee)
- At least three management grants to heritage area management entities on a rotating basis that ensures each of the 13 heritage area management grants are selected at least once over a five-year period

In addition to the above, MHT and Maryland Heritage Areas Program staff reserve the right to select other grantees for financial spot check at any time during the grant when concerns regarding risk, materiality or previous compliance arise.

In addition to the financial documentation listed in the previous section, grantees selected for financial spot check will also be required to **submit a detailed Financial Spot Check Expense Form** that lists all the project expenditures (grant and match funds) by approved line items based on their Scope of Work. MHT or Maryland Heritage Areas Program staff will provide the form to grantees at the time they are notified that they have been selected for financial spot check.

Instructions for submitting financial spot check documentation electronically are outlined below:

1. After receiving notification that your project has been selected for financial spot check, make sure you have received the **Financial Spot Check Expense Form**. This should have been included in your notification. If you do not have it, reach out to your project monitor immediately.
2. Review the **Financial Spot Check Expense Form** to verify that the line items listed match your records. Then enter the corresponding amounts of actual expenditures for grant funds, match, and other project costs.

3. On your own computer, create a main electronic folder using the following naming format “INSERT NAME OF ORGANIZATIONS_MHAAFY27_Financial Docs.”
4. For each line item listed in the Financial Spot Check Expense Form, create subfolders in the main folder. For example, “Exhibit Designer Consultant,” or “Brochure Design and Printing.”
5. Organize your financial documentation by line item categories and scan (pictures are also acceptable) and upload all documents to your own computer in a PDF format. Documentation should show what was purchased, when it was purchased (or when the work was completed), and how much it cost. Acceptable documentation includes:
 - Invoices
 - Receipts
 - Timesheets/paystubs for staff match
 - Log sheets for volunteer match
 - Contracts
 - QuickBooks or other accounting system printouts

Each document should be saved using the following naming format, “INSERT NAME OF LINE ITEM_INSERT NAME OF VENDOR_INSERT NAME OF ORGANIZATION.” For example, Exhibit Designer Consultant_ ABC Designer_ XYZ Museum.” Check to make sure all receipts for each subfolder add up to the amounts shown for each corresponding line items in the **Financial Spot Check Expense Form**.

6. If you have procurements more than \$50,000, create a separate subfolder labeled “Bid Documentation” and save copies of the required three bids as well as the documentation and criteria on why a vendor was selected. For any sole source procurements, include a written justification that explains why only one product or service vendor could meet specific project requirements and how the sole source procurement was reasonable and customary for the type of goods and services being obtained.
7. Save the main folder and all subfolders to your own computer and email them to sabrina.roundtree@maryland.gov. To email a file folder:
 - Locate the main folder (which includes all subfolders) you want to send
 - Right-click on the folder, select Send to, and then click Compressed (zipped) folder. (This saves the folder as a compressed folder)
 - Open your email and create a new message to sabrina.roundtree@maryland.gov, click the Attach button, select your new .zip file, and click Open to attach it to your email.

- Send your email

Incomplete financial spot check submissions will be returned with revision requests. Failure to submit a satisfactory Final Report or the financial documentation requested by MHT or Maryland Heritage Areas Program staff is a default under the Grant Agreement that may result in in cancellation of the grant and/or your repayment of disbursed grant funds.

If you have any questions about submitting financial spot check process, please contact your project monitor or MHT grant staff contact.

See Appendix E: Sample Financial Spot Check Expense Form.

Conclusion

Congratulations again on receiving a grant from the Maryland Heritage Areas Program! We are looking forward to working with you to ensure that you are good stewards of State funds, and your project is completed successfully. If you have additional questions, please do not hesitate to contact your project monitor using the contact information provided on the cover page.

Appendix A – Sample Project Summary Sheet

Maryland Heritage Areas Program Project Summary Sheet

The Project Summary Sheet verifies your project details with Maryland Heritage Areas Program staff. You must review and submit, even if there are no changes to your project. Without this form, we cannot begin to draft your Grant Agreement. The faster you complete this step, the sooner you'll receive your Grant Agreement electronically for signature.

Grantee Orientation

Before completing this Project Summary Sheet, please view the online Maryland Heritage Areas Program grantee orientation here: <https://youtu.be/kaKjpf6bkBo?si=PZU5S0L1hWvo4NEm>

Once you complete the online orientation, please take this short quiz: [FY27 Maryland Heritage Areas Program Orientation Quiz - Google Forms](#).

Please select TRUE below certifying that an authorized representative from your organization has completed the mandatory orientation session and quiz provided by Maryland Heritage Areas Program staff that is required for all grant recipients.

An authorized representative from the grantee organization has completed the online orientation and quiz*

Project Information

Please review the following information. If any of the information is incorrect, please update it in the "Additional Information" field at the bottom of the page. The information provided in this document will form the basis of your Grant Agreement. Please be sure to submit the form, even if there are no changes.

Project Contact

Project Title

Scope of Work

Easement and Preservation Requirements

Grant Award*

\$

USD

Project Start Date*

MM/DD/YYYY

Required Total Match*

\$

USD

Project End Date*

MM/DD/YYYY

Procurement Requirements*

Do you anticipate any single purchases more than \$50,000? If so, please select True here. Single purchases more than \$50,000 must follow the Maryland Heritage Area Program's procurement procedures, found in the Grants Manual here: <https://mht.maryland.gov/planning-protection/maryland-heritage-areas-program/maryland-heritage-areas-program-project-grants>



Project Monitor



Additional Information or Changes*

Please indicate if there are any changes to your Scope of Work, Timetable, or contact information. If no changes are required, please indicate that here.



Property Owner Consent (Capital Projects Only)

Please select **TRUE** in the field below verifying that either your organization owns the property where this project is taking place OR you possess a letter from the property owner consenting to the project.

Letters from property owners must be in the format provided by the Maryland Heritage Areas Program as provided in Appendix H of the FY27 Project Grant Guidelines found [here](#) and should be uploaded to this form.

The grantee organization is the property owner or I am providing a consent letter from the owner



Upload your Property Owner Consent Letter Here (if applicable)



Click or drop files here to upload
Maximum file size: 29MB

Grant Agreement Signatory

Name of Person Signing the Grant Agreement*

Title of Person Signing the Grant Agreement*

Email Address of Person Signing the Grant Agreement*

If you shared access to your application with your local heritage area, you must remove them from your grant at this time.

To do so, please go to your account in the grants portal, locate your grant, and click the "Manage" button, followed by the "Manage applicants" button.

 Application ID: 2120044	FY27 Maryland Heritage Areas Program		Declined
	View Guidelines		
	Martha Waldron on behalf of Awesomest House Museum in the World		
	Maryland Heritage Areas Program Eligibility Quiz	Submitted on Dec 11, 2025	
	FY27 Maryland Heritage Areas Program Intent to Apply Form	Submitted on Dec 11, 2025	
	FY27 Maryland Heritage Areas Program Project Grant Application	Submitted on Dec 16, 2025	
	Created on Dec 11, 2025		Manage ▾

 [Manage applicants](#)

Finally, locate the heritage area director's email and click the red X to remove them from your application



Appendix B – Easement Requirements

If your Project Grant Agreement indicates that you must convey an easement or preservation agreement as a condition of your grant award (check your Project Grant Agreement, **Easement and Preservation Requirements**), the following information will apply to your project.

As a condition of payment of your grant, you may be required to execute, or have the owner of the property where the project is taking place to execute, one of the following agreements:

- A Deed of Preservation Easement Agreement (an “Easement”), or a modification to an existing Easement (a “Modification”) encumbering the historic real property assisted by the grant; or
- A preservation agreement (a “Preservation Agreement”), or a modification of an existing Preservation Agreement (also a “Modification”), for historic property other than real property.

“Historic property” means a site, building, structure, monument, or object which is individually listed in, or is individually eligible for listing in the Maryland Register of Historic Properties.

The Easement or Preservation Agreement requires that you or the owner of the project property:

- maintain the project and the project property in good order, condition and repair;
- permit MHT to enter upon and inspect the project during construction;
- prevent any waste of the project property; and
- prevent any demolition or modification of the improvements on the project property without MHT’s prior written consent.

If you or the owner of the project property are required to execute an Easement or Modification, you or the property owner must also provide the following documentation:

- an owner’s policy of title insurance for the project property, along with a bring to date title search updating the policy to the date of the Easement, satisfactory in form and content to MHT and its legal counsel;
- evidence of property/hazard insurance, commercial general liability or other insurances coverages in accordance with the insurance requirements set out in this Manual;
- evidence that the Easement or Modification has been recorded among the applicable land records of the county in which the project property is located; and
- any other instrument or document required by MHT, including an easement non-disturbance agreement, or the subordination of existing, recorded liens on the project

property, to prevent the foreclosure of such liens from extinguishing the Easement.

The Easement requirements include the following:

- The Easement will have a term of duration equal to the longer of (i) fifteen years or (ii) one year for every \$5,000 increment of the grant, or portion thereof, as further described in your Project Grant Agreement, if applicable;
- The Easement must be a first lien encumbrance with respect to the project property, prior to all other liens; and
- You must reimburse MHAA all grant funds that have been disbursed if the Easement is determined, by court finding or otherwise, to be not legally enforceable by MHT for any reason, and you will not be entitled to payment of any further grant funds.

If you or the property owner executes an Easement or a Preservation Agreement, grantee must provide, or cause the owner of the Property to provide the following documentation:

- evidence of property/hazard insurance, commercial general liability or other insurances coverages in accordance with the insurance requirements set out in this Manual; and
- Any other instrument or document requested by MHT.

An existing Easement or Preservation Agreement that is satisfactory to MHT may satisfy these requirements.

Appendix C – Insurance Requirements

As a condition of payment of a capital grant you must carry, and may be required to provide evidence of, the following insurance coverages satisfactory to MHT with respect to the property where the project will take place.

Insurance coverages must be provided by a company that is registered with the Maryland Insurance Agency and authorized to do business in the State.

If you are a government entity, the insurance requirements may be satisfied through evidence of a self-insurance program satisfactory to MHT.

Hazard Insurance

You must carry, and may be required to provide evidence satisfactory to MHT that the project property is insured against loss or damage by fire and such other hazards, casualties, and contingencies as may be required from time to time by MHT, in amounts satisfactory to MHT, but not less than the total amount of the grant plus the outstanding principal balances of any mortgages on the property.

You must have the hazard insurance policy endorsed to add MHT as an additional insured (but without obligation on the part of MHT to make premium payments), with rights to prior notice of policy cancellation.

You must maintain property insurance on the project property from the Project Start Date throughout the term of the Easement, Preservation Agreement or Modification, as applicable. If requested by MHT, you must submit evidence of such insurance coverage to MHT.

Commercial General Liability Insurance

You must carry insurance and may be required to provide evidence satisfactory to MHT that the project property is insured, under a comprehensive general liability insurance in amounts satisfactory to MHT.

You must have the comprehensive general liability insurance policy endorsed to add MHT as an additional insured (but without obligation on the part of MHT to make premium payments), with rights to prior notice of policy cancellation.

You must maintain comprehensive general liability insurance on the project property from the Project Start Date throughout the term of the Easement, Preservation Agreement or Modification, as applicable. If requested by MHT, you must submit evidence of such insurance coverage to MHT.

Flood Insurance

If your project property is located in a 100-year flood plain, you must carry, and may be required to provide evidence satisfactory to MHT that the Property has flood insurance.

You may be required to provide evidence showing whether the project property is located in a 100-year flood plain, as designated by the United States Department of Housing and Urban Development.

If the project property is located in a 100-year flood plain, you must obtain flood insurance coverage in amounts satisfactory to MHT.

You must have the policy endorsed to add MHT as an additional insured (but without obligation on the part of MHT to make premium payments), with rights to prior notice of policy cancellation.

You must maintain flood insurance on the project property from the Project Start Date throughout the term of the Easement, Preservation Agreement or Modification, as applicable. If requested by MHT, you must submit evidence of such insurance coverage to MHT.

General Contractor's Insurance

You or your general contractor must carry, and may be required to provide evidence satisfactory to MHT of you or your general contractor's insurance coverage for comprehensive public liability, property damage liability/builder's risk, and workers' compensation in the form and amounts required by MHT.

You or your general contractor must maintain general contractor's insurance from the Project Start Date until the project is completed. If requested by MHT, you must submit evidence of such insurance coverage to MHT.

Appendix D – Sample Request for Payment

Request for Payment

Complete this page to request your second grant payment. If you decide not to request payment at this time, you do not need to complete this page. You may request funds in the future by reaching out to your project monitor.

Expenditures to Date

Upon completing the Mid-Project Report, grantees who have expended roughly 50% of their award and/or 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 Heritage Areas Authority and that the amounts listed are correct.

Grant Award

\$

USD

Total Grant Funds Expended to Date

\$

USD

Required Total Match

\$

USD

Total Match Funds Expended to Date

\$

USD

Approved Other Project Costs

\$

USD

Total Other Project Costs (non-state) Expended to Date

\$

USD

Payment Request

Payment
Request
Amount

\$

USD

Name

Title

Date
Requesting
Payment

MM/DD/YYYY

Payment Address*

Please note, if this address does not match the organization's address listed above, you may be asked to provide additional change of address documentation.

Start typing to search for an address

This input is required

Can't find your address?

Confirm Your Request for Payment

By selecting TRUE in the field 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.

Appendix E – Sample Financial Spot Check Expense Form

Financial Spot Check Expense Form					
Maryland Heritage Areas Program Project Grant					
[Insert Fiscal Year Grant Awarded]					
[Insert Applicant Organization Name]					
[Insert Project Title]					
Submitted: [INSERT DATE SENT]					
Name and Email of Person Submitting Form: [INSERT NAME AND EMAIL]*					
Approved Scope of Work: [INSERT SCOPE OF WORK]					
Line #	Approved Scope of Work Expenses (the categories of spending listed in your Scope of Work above and how your financial documentation should be organized)	Actual Grant Funds Spent	Actual Match Funds Spent (total should equal same amount as grant funds)	Actual Other Project Costs Funds (non-state funds)	Total Actual Project Funds Spent
1					\$ -
2					\$ -
3					\$ -
4					\$ -
5					\$ -
6					\$ -
7					\$ -
8					\$ -
9					\$ -
10					\$ -
11					\$ -
12					\$ -
13					\$ -
14					\$ -
15					\$ -
16					\$ -
17					\$ -
18					\$ -
19					\$ -
20					\$ -
	Totals	\$ -	\$ -	\$ -	\$ -
*The person submitting this form must be an authorized signatory for the grantee and able to certify that all of the expense listed are correct and were spent in accordance with the terms and conditions of the Grant Agreement and any subsequent amendments (if applicable).					
STATE USE ONLY - MHT GRANTS STAFF:					
Form Reviewed By:					