



Humanities MONTANA

AWARD MANAGEMENT GUIDE

This document outlines the requirements for managing Humanities Montana subawards, project management, and final reporting requirements. Contact Humanities Montana staff via email at megan.sundy@humanitiesmontana.org or by calling (406) 243-6067 for additional information and resources.

Grant Programs Included

Mini-Grants
Community Project

Public Humanities Fellowships
Film + Video

Reporting Deadlines

90 Days after Period of
Performance ends

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Overview

This Award Management Guide provides detailed instructions for managing subawards from start (date of award decision) to end (submission of final report). The guide can be found on our website under [Grants Resources](#) and on each grant program's webpage.

Humanities Montana must ensure that subrecipients track, appropriately use, and report program income generated by the subaward. [See 2 CFR § 200.332](#) for information required for subaward agreements.

Quick Notes

- Any changes to the project's timeline, scope, work plan, or budget must be communicated with, and approved by, Humanities Montana in writing at least 30 days BEFORE the end of your grant term or period of performance. Grant term dates and your final report submission deadline are NOT the same.
- Your grant term is included in your award letter and subaward partnership agreement.
- Your final report is due 90 days after your project's official grant term end date.
- You may preview final report questions at any time in our [online grant portal](#). The report is assigned to you when your award is approved and announced. We encourage you to review the report questions to ensure you are collecting data needed for your final report.
- If you need an extension of your final report deadline, contact us ASAP! Do not call the day after your report is due. Call early, and call often!
- Remember to keep appropriate financial records of all allowable expenses related to your award. This includes documentation for any cost share (in-kind or other secured funding) expenses reported to Humanities Montana.
- Any organization with delinquent or incomplete final reports will be ineligible to apply for another grant until the report is submitted and approved by staff.

Disbursement of Funds

Award Announcements

Applicants are notified of award decisions in writing by the date(s) referenced on our website. Following Humanities Montana's announcement of funded projects, you may

request results of your project evaluations by contacting megan.sundy@humanitiesmontana.org.

Recipients of Public Humanities Fellowships, Community Project grants, and Film + Video grants will be required to schedule a 30-minute award orientation with Humanities Montana staff within two weeks of their award announcement.

Award Distribution

If Humanities Montana makes an award, the applicant organization or individual fellow is considered the subrecipient of record and assumes all programmatic, financial, and legal responsibilities associated with the award, including adherence to, and compliance with, federal regulations and the terms and conditions of the award.

Note: Each award is subject to [2 CFR Part 200 Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards](#), the [General Terms and Conditions for Awards to Organizations \(for grants and cooperative agreements issued January 1, 2022 or later\)](#), and any specific terms and conditions that NEH places on Humanities Montana as a PTE.

Award funds will be released pursuant to each of the following:

- (1) Each subrecipient will be contacted by Humanities Montana staff after the award announcements to adjust project budgets, grant terms, and work plans as needed in response to specific conditions of the award, such as allocation of funds to different expense categories or partial funding amounts.
- (2) Subrecipients of major awards will be asked to participate in a virtual awardee cohort session(s), during which they will offer a brief overview of their project to Humanities Montana staff and awardees from that particular grant cycle. Although not required, all subrecipients are strongly encouraged to participate (Community Project, Film + Video, and Fellowship awardees ONLY).
- (3) To ensure that organizations are compliant with both Humanities Montana and NEH requirements, all subrecipients are required to sign a subaward partnership agreement and provide a copy of the organization's most recent form W9 prior to receiving award funds.
- (4) Subrecipients will receive their award letter and subaward partnership agreement electronically via DocuSign. Once received, the subrecipient has 30 days to sign the subaward partnership agreement and provide a copy of the

organization's W9. If the agreement is not signed within 30 days, the organization risks forfeiture of their award.

- (5) Unless otherwise specified, upon receipt of the signed agreement and any required supplemental documentation, Humanities Montana will send a check for 100% of the award amount to the name and address of the applicant organization as listed on the organization's Form W9. The applicant organization must have a [UEI](#) (not required for fellowships), a [W9](#), and the capability to deposit this check and write checks against the deposited funds. Humanities Montana writes checks to subrecipients (applicant organizations) at the beginning and end of each month.

Award Management

Project Monitoring

Humanities Montana will monitor the subrecipient and project activities to ensure that subawards are used for authorized purposes; comply with federal statutes, legislative requirements, regulations, and the terms and conditions of the subaward; and achieve their performance goals. Humanities Montana must ensure that subrecipients track, appropriately use, and report program income generated by the subaward. [See 2 CFR § 200.332](#) for information that subrecipients must include in subaward agreements.

Humanities Montana staff may contact subrecipients during their grant period of performance to check on the status of project activities and inquire about any necessary modifications to the project budget, activities, or timeline.

Humanities Montana reserves the right to terminate awards consistent with [2 CFR § 200.340](#).

Branding Requirements

Subrecipients are required to acknowledge Humanities Montana support in all materials publicizing or products resulting from Humanities Montana-funded activities. Materials (including, but not limited to: promotional materials, publications, social media assets and content, etc.) must contain an acknowledgment of Humanities Montana support through use of Humanities Montana logos and verbal or written acknowledgements at public events. Use of logos must adhere to Humanities Montana's branding guidelines. [Download Humanities Montana Logos and Brand Guidelines.](#)

Fiscal Management

Refer to the Application Guidelines and Budget Instructions for clarification regarding allowable and unallowable expenses. Also, reference the approved project budget or table in your active requests in the [online grant management portal](#). If you are unsure your expenses are allowable, contact Humanities Montana at megan.sundy@humanitiesmontana.org immediately.

The fiscal manager is responsible for handling grant funds. All grant related expenses, income, and in-kind contributions must be documented and reported at the end of the grant.

Fiscal management duties and responsibilities include:

- Retaining financial records for the grant project for inspection and/or audit for a period of five years following the submission of the final report. Financial records include receipts/invoices/bills documenting actual expenditures, signed statements documenting the provision of in-kind goods and services, payroll statements/stubs, etc., covering **all** expenditures of grant funds, matching funds, and project income. The federal government, Humanities Montana, or their designee may make a full audit of the grantee's records relating to this grant.
- Keeping accurate records of volunteered time and contributed services. This is your in-kind contribution. These records must be retained for five years as part of your financial records.
- Unless specified otherwise in your award agreement, Humanities Montana does **not** require subrecipients to provide copies of receipts and in-kind forms with final financial reports. However, you **MUST** keep receipts, invoices, and other sufficient documentation of reported expenses for reference for at least five years. Humanities Montana may request copies of your expense receipts at any time up to five years after your final report is submitted. If you cannot assure access to these records for five years as required, please provide copies of all receipts, in-kind forms, and other documentation for ALL income and expense figures on your final financial report.
- Grant funds may not be used for lobbying, capital/equipment purchase, liquor, or entertainment.
- Grant funds may be expended only for grant project purposes and activities as set forth in the grant application and budget or as subsequently modified. A request for any budget modification must be made in writing and approved by Humanities Montana before any expenditures differing from the original grant award are paid from funds provided by Humanities Montana. The types of modifications which require prior written approval include:

- Changes in project scope, purpose or activity
- Changes in the project director or other key professional personnel identified in the grant application
- Changes in any project budget line which exceed ten percent (10%) of the total budget, or five hundred dollars (\$500.00) whichever is greater
 - Changes which introduce or eliminate types or categories of expenditures
 - Changes in duration of grant period (these changes must be submitted at least thirty (30) days prior to the termination of the grant period of performance)
 - Decreases in the level of cost-sharing cash
 - Decreases in the level of cost sharing in-kind
- All project employees must have unemployment insurance and workers' compensation insurance. All state and local tax and employment laws, rules, and regulations applicable to employees paid from grant funds must be followed. All wages, fees, and non-employee compensation (e.g., honoraria) paid with grant funds must be reported to the appropriate local, state, and federal tax authorities, as required by law. Project staff and resource people are not employees of Humanities Montana, but are employees of the grantee.
- Unused grant funds at the end of the grant period must be returned to Humanities Montana. Please contact staff before sending remittance at megan.sundy@humanitiesmontana.org.

Final Reporting

If you receive a subaward, you must complete required reports using the Humanities Montana online [grant management system](#), unless otherwise instructed. You may preview the final report question list and submission form at any time after your grant is awarded.

An online final report is due no later than 90 days after the grant period of performance ends. However, we strongly recommend you submit your report immediately upon conclusion of your grant work. To access the final report, log in to the same grants management system you use to apply for the grant.

[Access the online grant management system.](#)

You will receive an automatic email reminder two weeks before the deadline. Failure to file the final report in a timely manner will disqualify your organization from receiving Humanities Montana grants and programs in the future.

Final Report Questions are available for review in our grant management portal. *Note: final report questions are subject to change annually in accordance with NEH requirements.*

Subrecipients must include the following in the final written report:

- **A synopsis of project progress, achievements, and lessons learned** specific to proposed activities included in the original proposal and within the approved period of performance.
- **Final products and co-branded materials**
- **Audience/participant counts** (e.g., attendance numbers, views, number of partners) and demographics at your program(s), program type, and venue. You strongly encourage all awardees to review the final reporting questions early and often to ensure you are collecting data needed for the final follow up report.
- **A final financial report:** You will update your budget table or download your approved project budget from the online grant management system, revise, obtain your fiscal manager's signature, and upload the revised version to your final report.
 - Report actual expenses against approved project expenses.
 - Do not reallocate funds to different categories without approval from Humanities Montana.
 - Include totals and a description for cost share expenses (in-kind and other cash income).
 - Explain the source of your cost share total.
 - Include your fiscal manager's signature on the report before submitting your final report.

The final financial report must show expenditure of all grant funds awarded. Any amount not accounted for in the budget must be reverted to Humanities Montana by check at the close of the grant period. If you need to revise fund allocations, you must contact Humanities Montana and receive written approval. We strongly prefer grantees spend the entire amount awarded.

LIVE Final Report Discussions (Optional)

We now offer awardees an (optional) opportunity to discuss your project with both Humanities Montana staff and other awardees during a live, virtual report discussion. As a humanities organization, we feel the best way to learn from one another is through conversation. By sharing your successes, challenges, and lessons learned with us and other like-minded organizations, we can work to advance the humanities in Montana.

If you are interested in participating, please sign up for one of our upcoming discussions. Virtual discussions are held every other month (Jan., March, May, July, Sept., Nov.). We limit discussion groups to no more than three awardees, so be sure to sign up early!

[Final Report Discussion Registration](#)

Humanities Montana Contact Information

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