

# MONTANA

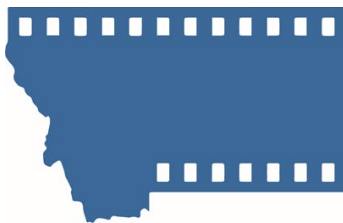
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DEPARTMENT OF COMMERCE

Destination MT Division

Montana Film Office | Big Sky Film Grant Program

Project Administration Manual



**MONTANA**  
**FILM OFFICE**



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## Montana Film Office

The Montana Film Office (MFO) was established in 1974 as a central information source for on-location filmmakers and is committed to serving the production industry and the citizens of Montana. The primary role of the Montana Film Office is to promote the State of Montana as a media production location—including for film, television, and print industries. The Montana Film Office's goals are to: invite these productions into Montana for the overall economic benefit of the state; assist producers to find locations that fit their script as well as act as their liaison through every phase of production; and nurture and support the development of Montana's resident crew base and resident filmmakers. The Montana Film Office is a program within the Brand MT Division of the Department of Commerce and is funded by an allocation of the Lodging Facility Use Tax – commonly known as the “bed tax.” In 2023, [Senate Bill 540](#) of the 68th Montana Legislature revised the laws related to state-funded tourism promotion to require a specific allocation of lodging facility use tax for “Montana-based film grants.”

Alternative accessible formats for this document will be provided upon request. If you need this document in an alternative format, such as large print, Braille, audio tape, or computer diskette, please contact the Montana Film Office at (406) 841-2876, TDD (406) 841-2770, or the Relay Services number, 711.

The Department of Commerce does not discriminate based on disability in admission to, access to, or operations of its program, services, or activities. Individuals who need aid or services for effective communications or other disability-related accommodations in the programs and services offered are invited to make their needs and preferences known. **Please provide as much advance notice as possible for requests.**

## Big Sky Film Grant Project Administration Manual

This Big Sky Film Grant (“BSFG”) Project Administration Manual provides an overview of MFO’s internal processes for grant management from start-up to close-out. Grant applications, guidelines, administration manual, and other resources are available on the MFO website

[https://www.montanafilm.com/mfo\\_bigskyfilmgrant/](https://www.montanafilm.com/mfo_bigskyfilmgrant/). Contact MFO staff via email at [montanafilm@mt.gov](mailto:montanafilm@mt.gov) or by calling 406.841.2876, or 1.800.553.4563.

To the extent any conflict exists between this checklist and the Grantee’s contract with Commerce, the contract controls. This Manual is provided for illustrative purposes only, and does not constitute a contract or binding agreement between MFO and Grantee.

## Project Start-Up Requirements

The disbursement of grant funds for awarded projects is subject to Grantee’s completion of start-up requirements and execution of a contract between Grantee and the Department of Commerce (“Commerce”).

### Start-Up Requirements Checklist:

- Registration with the Montana Secretary of State:** Most eligible entities must register or have a current business registration with the Montana Secretary of State, to the extent required by Montana law. To obtain registration information and instructions, call the Montana Secretary of State office at 406.444.2034 or visit <https://biz.sosmt.gov>.
- Workers’ Compensation Insurance:** Insurance coverage may be provided through a private carrier or through the Montana State Fund. Evidence of compliance must be in the form of workers' compensation insurance, an independent contractor's exemption, or documentation of corporate officer status. An exemption can be requested through the Department of Labor and Industry, Independent Contractor Central Unit.
- Commercial General Liability Insurance:** The standard insurance requirement for film production in Montana is a \$1 million comprehensive general liability insurance in the form of an original certificate which covers the entire period of the Principal Photography Days. The certificate must name the State of Montana and its employees as additionally insured.
- W-9 completed for Grantee:** This form is available on the IRS website <https://www.irs.gov/forms-pubs/about-form-w-9>. The information provided on the Grantee’s W-9 form is used to create and update the vendor (supplier) account with the State of Montana. It is imperative that name, address, and federal tax identification number match what is on record with the IRS. Inconsistencies may delay payment of grant funds. The State of Montana issues 1099 annual tax forms to vendors. Grant awards may be taxable, and the Grantee may consult a tax professional for assistance.
- EFT if Grantee elects to receive payments electronically:** Grantee must complete a 204 Form, which the Department of Administration requires to electronically transfer funds. A 204 Form is available on the DOA website: [https://mine.mt.gov/\\_assets/documentation/sabh/rs/accounting/Daily\\_Operations/204---Electronic-Funds-Transfer-Sign-Up-2019.pdf](https://mine.mt.gov/_assets/documentation/sabh/rs/accounting/Daily_Operations/204---Electronic-Funds-Transfer-Sign-Up-2019.pdf).

- Onboarding meeting (virtual or in-person) scheduled: It is essential for the Montana Film Office to meet with key people prior to contracting to review terms of contract, communicate expectations and requirements, provide information and resources, share best practices for grant management, and general Q&A. MFO staff will communicate these expectations to Grantees, and Grantees must satisfy those expectations.

## Contract

The executed contract between the Grantee and Commerce is the legal document that governs the administration of the grant, and will identify the following provisions (among others):

- i. the timeframe of the contract;
- ii. the maximum amount of BSFG funds to be awarded;
- iii. the scope of work and required deliverables;
- iv. the reporting requirements;
- v. any special conditions placed by Commerce; and
- vi. the general terms and conditions associated with the grant.

Grantees must sign a contract with Commerce prior to receiving any funds.

### Contract Process:

Once all start-up requirements are met, the contract is prepared for execution. The BSFG liaison will provide a draft copy of the contract to the Grantee to review. The Grantee must confirm that the information is correct. The Grantee is encouraged to respond promptly with requests for changes; Commerce reserves the right to reject those requested changes. If the MFO does not receive a response from the Grantee within 30 days, MFO will assume the Grantee accepts the contract as presented and the routing process for approval and signatures will begin. The contract will be reviewed by Commerce and then transmitted to the Grantee through an electronic process for signatures. A copy of the executed contract will be available electronically when all the signatures have been obtained. A unique contract number will be assigned and must be used in all communications and referenced on requests for payments, final reports, and other important documents. Please contact the MFO staff if there are concerns or assistance needed with the execution of the contract or meeting start-up conditions.

## Project Management

### Award Disbursement

The disbursement of grant funds for awarded projects are subject to Grantee's completion of start-up requirements and execution of a contract between Grantee and Commerce.

Grant awards are disbursed in multiple payments depending upon the total grant award amount, as specified in Grantee's contract.

Grant awards in an amount up to \$10,000 are paid in two payments. The first payment is disbursed after the contract is executed, and the second or final payment is disbursed once all the required deliverables and reporting have been received by the MFO and the contract terms are satisfied.

Grant awards in an amount exceeding \$10,000 are paid in three or more payments. The first payment is disbursed after the contract is executed. Subsequent payments must be requested by the Grantee and are subject to evidence of expenses and corresponding receipts. Subsequent payments are eligible for disbursement once the MFO receives a list of expenses and corresponding receipts that total or exceed the amount of the first disbursement. The final payment is disbursed once the MFO receives the required deliverables and the terms of the contract have been met.

### **Payment Method**

Unless the Grantee has an eligible EFT authorization, funds will be paid to the Grantee via mailed check.

A State of Montana vendor (supplier) account and identification number is assigned to each Grantee so that payments can be made. Information provided on the Grantee's W-9 form is used to create and update the vendor account.

### **Accounting & Recordkeeping**

BSFG Grantees must maintain all receipts and expenditures of grant funds in accordance with the program guidelines and adhere to all contractual obligations. Recordkeeping templates are available through the MFO.

The Grantee must create and maintain all records of grant funded project activities, including but not limited to, financial records, supporting documents, and other records as required by law or other authority. Records must be maintained for five (5) years after either the completion of the contract or the conclusion of any claim, litigation, or exception relating to the project taken by the State of Montana or any third party, whichever is later. The Grantee must provide Commerce, Montana Legislative Auditor, or their authorized agents access to all project records upon request, at no cost.

### **Project Monitoring**

Grant projects are subject to monitoring, and Commerce may request a project report anytime and in any specified form. Grantees should be prepared to provide project updates on:

- i. the production timeline;
- ii. funding sources;
- iii. personnel; and
- iv. expected completion date.

Generally, Grantees will complete quarterly reports in compliance with project monitoring. Quarterly reports occur 15 days after the end of each calendar quarter (April 15th, July 15th, Oct 15th, January 15th). Grantees will be contacted via e-mail and/or phone to complete the quarterly report. Changes impacting the completion of the project should be reported immediately to the MFO.

### **Project Closeout**

The Grantee must submit all deliverables, and documentation that the contract's scope of work was completed in adherence to the contract to the MFO. Submission is required upon completion of production or by the contract termination date, whichever occurs first.

### **Deliverables**

The Grantee must submit documentation of the following deliverables to the MFO:

- i. An itemized list of all Montana-Spend expenses. Each expense listed must include the city/town in Montana to verify the expenditure is made with a Montana vendor or compensation is paid to a Montana resident; unmarked expenditures will be disregarded. This requirement is similar to a film industry purchase order log. A customizable template is available through the MFO. The itemized list should include:
  - the vendor’s name (business or individual) and location (city/town);
  - date of the purchase;
  - invoice number, if applicable;
  - brief description of the goods, service, rental, etc.; and
  - the number of units multiplied by the unit cost or a total for each purchase line.
- ii. Corresponding receipts, or proof of payment, for all Montana-Spend expenses, including compensation, totaling the grant award amount submitted to the MFO within 60 days of Principal Photography completion in Montana. Invoices with payment recorded and balance due of \$0 may serve as proof of payment in lieu of a receipt.
- iii. One exclusive film trailer including the MFO and Big Sky Film Grant Recipient logos. This is an official movie trailer. Even if the film is sold to a distributor right away, this requirement must be met.
- iv. The Department of Commerce and MFO are granted the right to use the content in marketing and promotional efforts in perpetuity.
- v. MFO and Big Sky Film Grant Recipient logos prominently displayed on any related “Grant Project’s Title” (working title) websites controlled by the Grantee, and a link provided to [montanafilm@mt.gov](mailto:montanafilm@mt.gov).
- vi. MFO name recognition as a sponsor in all press releases controlled by the producer associated with “Grant Project’s Title” (working title);
- vii. Placement of both the Film Office and the BSFG logos and name recognition of the Montana Film Office in the credits of the film as follows: *Made possible in part by the Big Sky Film Grant*;
- viii. Placement of both the MFO and the BSFG logos on official movie posters and any signage controlled by the Grantee;
- ix. High resolution digital copy or physical copy of official movie poster;
- x. High resolution digital or physical copy of the completed project;

## Deliverables Submission

The Grantee must submit the deliverables by e-mailing the Montana-Spend expense list and supporting documents as attachments to the BSGF liaison. The contract number must be included in the subject line. For files larger than 1MB, Grantee must submit the deliverables through the state's secure File Transfer System <https://transfer.mt.gov/Home/Login> or Dropbox.com. These are the only two file transfer platforms accepted. Grantees may not send embedded links, Google Docs, password protected sheets, etc. All files must be accessible and should be stand-alone documents.

**Failure to complete the project or submit all required deliverables and project reports may result in Grantee required to repay grant funds.** Any authorized funds not expended under this grant or otherwise accounted for in accordance with the provisions of the contract will revert to the MFO and will be used to finance other grants.

## Project Completion Report

In addition to quarterly project reports, Grantees must submit a final report after project completion for grant closeout. The final report must include the city/town with locations, lodging, crew and call sheets and all expenses to verify eligible Montana-Spend, as well as any other information requested by MFO. The Grantee, in the format provided by the MFO, shall track and report the following:

- i. Total project cost, dollar amount of actual expenses;
- ii. Total Montana-Spend, dollar amount of actual expenses;
- iii. Actual number of production days spent in Montana; actual start date of principal photography and actual end day of principal photography in Montana;
- iv. Actual number of postproduction days in Montana;
- v. Total number of Montana hires;
- vi. Total dollar amount of compensation paid to Montana residents;
- vii. Total number of Overnight Lodging Stays in Montana and total amount spent on lodging expenses.
- viii. Total dollar amount spent on grip, electric and equipment rental, or purchases in Montana;
- ix. Actual filming locations in Montana, include name of the city/town, area and number of days spent in each;
- x. Entire Crew List, include individuals' names, positions/service, address (Montana or other) and full contact information;
- xi. Call Sheets from all days of principal photography filmed in Montana;
- xii. Distribution plan;

- xiii. Awards, press or festivals to be entered; and
- xiv. A narrative that summarizes the project. Describe the filming experiences in Montana, how the landscapes and towns contributed or complimented the creative efforts, any community support received, and knowledge gained, best practices learned or how the experience impacts future film projects.

### **Contract Closeout**

The closeout process for the grant contract begins once the final award payment has been issued and cleared. The Grantee will receive an e-mail from Commerce, notifying them of the upcoming closeout date and that no other action is required, except that all records must be retained for at least five (5) years.

Once closed, the Grantee is eligible to apply for a new BSFG grant.

The Grantee is encouraged to share post-grant activity such as releases, promotion, or sales with MFO.