

Montana Historic Preservation Grant Program

Request for Funds Training
2027 Biennium Awardees

Agenda

- Requests for funds
- Required documents
- Changes to banking information
- Invoices
- Changes in the project
- Questions



Requests for Funds

- The Montana Historic Preservation Grant Program can only reimburse for completed work; funds are not paid up front. Funds are dispersed by submitting a draw request with applicable invoices, i.e., a reimbursement program.
- Any expenses submitted for reimbursement must relate to the scope of work as outlined in the contract. Feel free to reach out to program staff with questions about whether an expense might be eligible or ineligible.



Requests for Funds

- For 2025 awardees, MHPG can only reimburse costs incurred on or after the effective date of House Bill 12, which was May 13, 2025.
- Awardees cannot submit a request for funds until they have executed a contract with Commerce.



Requests for Funds

- For your first request, Commerce will call you to verbally confirm the information on your E-204 form.
- Requests for funds typically take seven to 10 days to process. Please anticipate delays around holidays.
 - We encourage awardees to submit multiple invoices in each draw request. This will save time for you and for Commerce.



Changes to Banking Information

- If your banking information changes over the course of the contract, let Commerce know promptly, especially before submitting another draw.
- Submit an updated E-204 form.
- Before draws of over \$10,000 can be processed, you must confirm the information from the E-204 form verbally to an MHPG specialist over the phone.



Required Documents

- Request for Funds Form (Exhibit 2B)
- Uniform Invoice Tracking Spreadsheet (Exhibit 2C)
- Project Progress Report (Exhibit 2D)
 - On the final draw, Commerce will need the Project Completion Report instead (Exhibit 2E).
- Applicable invoices



Required Documents

To download the latest document templates and forms, visit

commerce.mt.gov/infrastructure-planning/grants-loans/montana-historic-preservation-grant.



Required Documents



Eligibility

Applying for Grants

Administering a Grant

Reports

MHPG GRANT ADMINISTRATION

The Montana Department of Commerce administers the MHPG Program through the Community MT Division. All awarded projects must follow the requirements in the most current version of the MHPG Project Administration Manual, and the additional requirements outlined in the contract with Commerce. The MHPG Project Administration Manual provides detailed guidance on how to administer a project in compliance with program regulations and state law. Community MT Division staff are available to help grantees navigate the project activities through direct technical assistance.

[MHPG PROJECT ADMINISTRATION MANUAL 2024 \(PDF\)](#)

[2025 BI GRANTEE START-UP PRESENTATION SLIDES \(PDF\)](#)

CHAPTER 1 - START-UP REQUIREMENTS AND CONTRACTING FORMS:

- [Exhibit 1A - Guidance on Match Documentation \(Word\) \(PDF\)](#)
- [Exhibit 1B - Sample Management Plan \(Word\) \(PDF\)](#)
- [Exhibit 1C - Sample Grant Assistance Agreement \(Word\) \(PDF\)](#)
- [Exhibit 1D - Signatory Certification Form \(Word\) \(PDF\)](#)

CHAPTER 2 - PROJECT MANAGEMENT FORMS:

- [Exhibit 2A - Procurement Processes \(Word\) \(PDF\)](#)
- [Exhibit 2B - Request for Funds Form \(Word\) \(PDF\)](#) ←
- [Exhibit 2C - Uniform Invoice Tracking Spreadsheet \(Excel\)](#) ←
- [Exhibit 2D - Project Progress Report \(Word\) \(PDF\)](#) ←
- [Exhibit 2E - Project Completion Report \(Word\) \(PDF\)](#)

Exhibit 2B, Sample Request for Funds Form, Draw One



Community MT Division

Montana Historic Preservation Grant Program

Request for Funds Form

Please attach all relevant invoices to the completed request for funds form. Remember that payment requests must be accompanied by a completed project progress report.

Section I - MHPG Recipient Information				
MHPG Contract Number MT-MHPG-CG-25-xxx	Request Number 1	Total Amount Requested \$23,420		
Name and Address of MHPG Recipient Really Cool Historic Site 789 Restoration Lane Heritageville, MT 12345	Make Deposit Payable To Really Cool Historic Site	Last Four Digits of Account Number 6789		
Section II - Financial Information				
	A Amount Budgeted	B Amount Expended Prior to This Request	C Amount Requested	D Balance Remaining After This Request
1. Total MHPG Administrative Budget	\$5,000	\$0	\$1,420	\$3,580
2. Total MHPG Activity Budget	\$50,000	\$0	\$22,000	\$28,000



3. Total MHPG Budget	\$55,000	\$0	\$23,420	\$31,580
Comments Ground floor window replacement + Admin costs				
Section III - Grantee Approval				
Signature Hank the Preservationist	Title Executive Director, Really Cool Historic Site	Date 1/1/2024		
Section IV - Commerce Approval				
Expenditures are reasonable and appropriate		Approved By: Title and Date		
Financial numbers and signatures are correct		_____		
consistent with preceding request(s) and SABHRS		_____		
Budget amendment approved		_____		

Exhibit 2B, Sample Request for Funds Form, Draw Two



Community MT Division

Montana Historic Preservation Grant Program

Request for Funds Form

Please attach all relevant invoices to the completed request for funds form. Remember that payment requests must be accompanied by a completed project progress report.

Section I - MHPG Recipient Information				
MHPG Contract Number MT-MHPG-CG-25-xxx	Request Number 2	Total Amount Requested \$18,580		
Name and Address of MHPG Recipient Really Cool Historic Site 789 Restoration Lane Heritageville, MT 12345	Make Deposit Payable To Really Cool Historic Site	Last Four Digits of Account Number 6789		
Section II - Financial Information				
	A Amount Budgeted	B Amount Expended Prior to This Request	C Amount Requested	D Balance Remaining After This Request
1. Total MHPG Administrative Budget	\$5,000	\$1,420	\$3,580	\$0
2. Total MHPG Activity Budget	\$50,000	\$22,000	\$15,000	\$13,000



3. Total MHPG Budget	\$55,000	\$23,420	\$18,580	\$13,000
Comments Second floor window replacement + Admin costs				
Section III - Grantee Approval				
Signature Hank the Preservationist	Title Executive Director, Really Cool Historic Site	Date 3/1/2024		
Section IV - Commerce Approval				
Expenditures are reasonable and appropriate		Approved By: Title and Date		
Financial numbers and signatures are correct		_____		
consistent with preceding request(s) and SABHRS		_____		
Budget amendment approved		_____		

Exhibit 2C, Sample Uniform Invoice Tracking Spreadsheet

1	UNIFORM INVOICE TRACKING SPREADSHEET FOR:			Really Cool Historic Site	DATE:			1/2/2024									
2		Invoice or Pay Estimate Number	Invoice Date or Time Period Covered	Total Amount of Invoice	Warrant Number	Date Paid	MHPG	#	RCHS	#	Awesome Foundation	#	City of Heritageville	#	Heritage County	#	Total Amount Paid This Invoice
5	Sunshine Windows	122	12/01/23	\$20,000.00			\$20,000.00	1	\$0.00		\$0.00		\$0.00		\$0.00		\$20,000.00
6	Happy Contractors	212	12/10/23	\$15,000.00		12/15/23	\$0.00		\$5,000.00	1	\$0.00		\$10,000.00	1	\$0.00		\$15,000.00
7	Glitter Glass	221	12/11/23	\$2,000.00			\$2,000.00	1	\$0.00		\$0.00		\$0.00		\$0.00		\$2,000.00
8	RCHS	1212	12/14/23	\$1,420.00			\$1,420.00		\$0.00		\$0.00		\$0.00		\$0.00		\$1,420.00
9	Sunshine Windows	2211	12/20/23	\$10,000.00			\$10,000.00	2	\$0.00		\$0.00		\$0.00		\$0.00		\$10,000.00
10	Glitter Glass	1122	12/22/23	\$5,000.00			\$5,000.00	2	\$0.00		\$0.00		\$0.00		\$0.00		\$5,000.00
11	Happy Contractors	2121	12/25/23	\$25,000.00			\$0.00		\$5,000.00	2	\$5,000.00	2	\$5,000.00	2	\$10,000.00		\$25,000.00
12	RCHS	1222	12/31/23	\$3,580.00			\$3,580.00	2	\$0.00		\$0.00		\$0.00		\$0.00		\$3,580.00
13				\$0.00			\$0.00		\$0.00		\$0.00		\$0.00		\$0.00		\$0.00
14				\$0.00			\$0.00		\$0.00		\$0.00		\$0.00		\$0.00		\$0.00
15				\$0.00			\$0.00		\$0.00		\$0.00		\$0.00		\$0.00		\$0.00
16				\$0.00			\$0.00		\$0.00		\$0.00		\$0.00		\$0.00		\$0.00
17				\$0.00			\$0.00		\$0.00		\$0.00		\$0.00		\$0.00		\$0.00
18				\$0.00			\$0.00		\$0.00		\$0.00		\$0.00		\$0.00		\$0.00
19				\$0.00			\$0.00		\$0.00		\$0.00		\$0.00		\$0.00		\$0.00
20				\$0.00			\$0.00		\$0.00		\$0.00		\$0.00		\$0.00		\$0.00
21				\$0.00			\$0.00		\$0.00		\$0.00		\$0.00		\$0.00		\$0.00
22				\$0.00			\$0.00		\$0.00		\$0.00		\$0.00		\$0.00		\$0.00
23				\$0.00			\$0.00		\$0.00		\$0.00		\$0.00		\$0.00		\$0.00
24				\$0.00			\$0.00		\$0.00		\$0.00		\$0.00		\$0.00		\$0.00
25				\$0.00			\$0.00		\$0.00		\$0.00		\$0.00		\$0.00		\$0.00
26				\$0.00			\$0.00		\$0.00		\$0.00		\$0.00		\$0.00		\$0.00
27				\$0.00			\$0.00		\$0.00		\$0.00		\$0.00		\$0.00		\$0.00
28				\$0.00			\$0.00		\$0.00		\$0.00		\$0.00		\$0.00		\$0.00
29				\$0.00			\$0.00		\$0.00		\$0.00		\$0.00		\$0.00		\$0.00
30				\$0.00			\$0.00		\$0.00		\$0.00		\$0.00		\$0.00		\$0.00
31				\$0.00			\$0.00		\$0.00		\$0.00		\$0.00		\$0.00		\$0.00
32				\$0.00			\$0.00		\$0.00		\$0.00		\$0.00		\$0.00		\$0.00
33				\$0.00			\$0.00		\$0.00		\$0.00		\$0.00		\$0.00		\$0.00
34				\$0.00			\$0.00		\$0.00		\$0.00		\$0.00		\$0.00		\$0.00
35				\$0.00			\$0.00		\$0.00		\$0.00		\$0.00		\$0.00		\$0.00
36				\$0.00			\$0.00		\$0.00		\$0.00		\$0.00		\$0.00		\$0.00
37				\$0.00			\$0.00		\$0.00		\$0.00		\$0.00		\$0.00		\$0.00
38	TOTALS			\$82,000.00			\$42,000.00		\$10,000.00		\$5,000.00		\$15,000.00		\$10,000.00		\$82,000.00



Copy and submit to the applicable funding agency with each drawdown request

Exhibit 2D, Project Progress Report



Community MT Division

Montana Historic Preservation Grant Program

Montana Historic Preservation Grant Planning Progress Report		
Project Progress Reports must be submitted with the Request for Funds Form during the term of the contract agreement.		
Date Submitted:	Report Period:	
A. Grantee		
B. Primary Contact		
C. Phone and Email		
D. County, City, Zip Code		
E. DOC Contract Number		
F. Project		
G. Name and location of all primary contractors, sub-contractors and sub-recipient entities engaged in any of the activities described in Section 6 SCOPE OF WORK of CONTRACT #	Contractor Name	City, State
	i. Percentage Complete	%



H. Current status of the project	ii. Is the project on track with the Implementation Schedule? If no, explain any issues in Section M. Yes <input type="checkbox"/> No <input type="checkbox"/>
I. Anticipated project completion date	\$
J. Cumulative costs incurred thus far	\$
K. Amount invoiced with this Progress Report	\$
L. Grant funds remaining	\$
M. Problems encountered and necessary modifications in the Scope of Work, budget or implementation schedule	
N. Any additional comments	
<i>To the best of my knowledge and belief, the information provided on this form is true and correct.</i>	
Signature:	Title:
Date:	

Invoices

The invoice should include:

- A description of work performed.
- The number of hours worked to accomplish each item.
- The amount being billed for each item.
- Work performed date(s) and work items completed.



Invoices

The invoice should include:

- Beginning and ending billing period dates
- Description of any other eligible expenses incurred during the billing period
- Total amount being billed

Note: Cost plus contracts are not allowable on MHPG projects.



Sample Construction Invoice

Sunshine Windows
529 Summer Road
Heritageville, MT 12345

INVOICE

Really Cool Historic Site
789 Restoration Lane
Heritageville, MT 12345

Invoice # 122
Invoice Date 12/01/2023
Due Date 01/31/2024

Item	Description	Unit Price	Quantity	Amount
Product	Materials: 44" x 48" window units	3000.00	6.00	18,000.00
Service	Labor: 11/29/23 Delivery + Installation of 4 windows on south side of RCHS building (ground floor)	120.00	7.00	840.00
Service	Labor: 11/30/23 Delivery + Installation of 2 windows on west side of RCHS building (ground floor)	120.00	5.00	600.00
Service	Labor: 12/1/23 staining of 6 window frames on south and west side of RCHS building (ground floor)	120.00	4.00	480.00
Product	Supplies: Gallon wood stain	40.00	2.00	80.00
NOTES: Invoice #122 covers the window replacement of 6 units on the ground floor of the Really Cool Historic Site building. Work was completed between 11/29/23-12/1/23.				
Billing Period: 11/1/2023-12/1/2023				
Subtotal				20,000.00
Total				20,000.00
Amount Paid				0.00
Balance Due				\$20,000.00

Sample Architectural Invoice

Restoration Architects
543 Spring Road
Heritageville, MT 1235

INVOICE

Really Cool Historic Site
789 Restoration Lane
Heritageville, MT 12345

Invoice # 054
Invoice Date 11/01/2023
Due Date 11/30/2023

Item	Description	Unit Price	Quantity	Amount
Service	John Doe, Designer II: Incorporate structural design into drawings for ground floor and 2nd floor skylight of RCHS building @\$125/hr	125.00	12.00	1,500.00
Service	John Doe, Designer II: 10/10/23 Design review with client @\$125/hr	125.00	2.75	343.75
Expense	Consultant Fees from Heritage Structural Engineering on 10/01/2023	2000.00	1.00	2,000.00
NOTES: Architectural Design Services for October 1-October 31, 2023.				
Subtotal				3,843.75
Total				3,843.75
Amount Paid				0.00
Balance Due				\$3,843.75

Sample Engineering Invoice

Heritage Structural Engineering
123 Winter Road
Heritageville, MT 12345

INVOICE

Restoration Architects
543 Spring Road
Heritageville, MT 1235

Invoice # 096
Invoice Date 10/01/2023
Due Date 10/31/2023

Item	Description	Unit Price	Quantity	Amount
Service	Jane Smith, Structural Engineer: 9/10/23 Site visit to RCHS to verify ground floor ceiling framing along with 2nd floor skylight area framing @\$100/hr	100.00	5.00	500.00
Service	Jane Smith, Structural Engineer: Structural Calculations of existing and new framing as a result of the site visit + sketch details @\$100/hr	100.00	15.00	1,500.00
NOTES: PROFESSIONAL FEES FOR STRUCTURAL ENGINEERING SERVICES (9/1/23-9/30/23)				
Subtotal				2,000.00
Total				2,000.00
Amount Paid				0.00
Balance Due				\$2,000.00

Sample Administrative Hours Tracking/Invoice

	A	B	C	D	E	F
1	Name	Title	Date	Task	Hours	
2	Sal Jones	Executive Director, RCHS	10/10/2023	Meeting with Restoration Architects	2.75	
3	Sal Jones	Executive Director, RCHS	10/15/2023	2nd floor removal of shelving to prep for construction	4	
4	Terry Wright	Maintenance Director, RCHS	10/15/2023	2nd floor removal of shelving to prep for construction	2.5	
5	Sal Jones	Executive Director, RCHS	10/20/2023	Meeting with Electrician re: ground floor lighting wiring	1.75	
6	Jo Brown	Administrative Assistant, RCHS	10/22/2023	Re-org of 2nd floor materials in temp storage off-site	6	
7						
8						
9	Total October Admin Hours				17	
10	17 hrs @20 = \$340					



A few reminders:

- Up to 10% of MHPG funding can be allocated toward administrative costs.
- We reimburse such work at \$20 per hour.

Changes in the Project

- Budget changes under \$5,000 on a single line item can be approved during the request for funds process; those over \$5,000 need a written request.
- Implementation schedule changes can be approved during the request for funds process.



Changes in the Project

- Scope of work changes need a written request.
- Please work with your Commerce liaison to submit a written request for certain project changes.



MHPG Contacts

General Questions

- doccdd@mt.gov
- 460-841-2770

CEV Program Supervisor

Jordan Conley

- jordan.conley@mt.gov
- 406-841-2773

MHPG Program Specialist

Lauren Dean

- lauren.dean@mt.gov
- 406-841-2794

Main Street Program

Coordinator Micky Zurcher

- micky.zurcher@mt.gov
- 406-841-2863