



# MUSCLE SHOALS

NATIONAL HERITAGE AREA

## **Muscle Shoals National Heritage Area Reimbursement Expense/Match Guide**

<http://msnha.una.edu>

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## **MSNHA Match Guide**

The Muscle Shoals National Heritage Area was designated by Congress in 2009 and covers the six counties of northwest Alabama. National Heritage Areas are places where historic, cultural, and natural resources combine to form cohesive, nationally important landscapes. The landscape of the Muscle Shoals National Heritage Area is dominated by the stretch of the Tennessee River once called the Muscle Shoals, a shallow, rocky section of the river that stretched from Decatur to Florence. Unlike national parks, National Heritage Areas are large lived-in landscapes. Consequently, National Heritage Areas entities collaborate with communities to determine how to make heritage relevant to local interests and needs. National Heritage Areas are funded through the National Park Service (NPS).

### **What is match?**

For every dollar that the MSNHA receives from NPS, we have to come up with a “dollar.” This is called a 1:1 match. Our dollar can be an actual dollar from a non-federal source, or it can be an in-kind donation or volunteer time. This guide covers the most typical forms of match generated by our partners. The documentation requirements laid out in this guide also cover reimbursable expenses allowed under the partnership or grant you have with the MSNHA.

### **What is overmatch?**

Every “dollar” over the one we need to match your project expenses is overmatch. Since some of the activities/expenses of the MSNHA don’t generate match (e.g. salaries, printing, supplies, sponsorships), we need to generate overmatch to help us make sure that we meet our 1:1 match requirement.

### **Why is match important?**

Match is important not just because it helps us to fulfill our obligation to NPS, but because it shows the engagement of our communities in projects that help to preserve the cultural, historical, and natural resources of our region. The more match that projects generate, the more we can show NPS and Congress that you care about these resources just as much as we do!

### **How do I know what match I need to turn in?**

Your match is spelled out in your contract. What is submitted as match/overmatch MUST line up with what is in your contract exactly. If it does not, your reimbursement/payment will be affected. It is important as you work on your project that you refer to your contract to make sure you are staying on target with match generation.

### **What if my budget or match changes during the project period?**

You MUST alert us to changes – whether to your budget or match –as soon as you are aware the change must take place. You must wait for confirmation of the revision from the MSNHA, which may require a revised budget signed by all parties, before proceeding with changes. The budget/match revision must occur within the period of performance of your project. You cannot change your budget or match after the project end date.

### **What is the project period and what happens if I need more time to complete the project?**

The project period for your grant or partnership project is laid out in your contract. Grant contracts have a start date, an end date, and a final report date on the front page of the contract. For partnerships, this information is contained within your addendum for each specific project. All work and payments must

take place during the project period. You cannot pay for something before the start date of the project and expect it to be counted as match or be reimbursed for it. If you need an extension on your project, you must request the extension from the MSNHA in writing and you must receive approval back from the MSNHA before the extension is made official. Pay attention to your deadlines and give yourself plenty of time to complete your project.

**Will there ever be times that I need to supply more information than what is laid out in this guide?**

Grant and partnership projects are complicated and there may be situations that arise which require additional documentation. Make sure to keep good records of your expenses/time/travel, etc. so if additional documentation is required, you will be prepared.

**How do I use this guide?**

This guide is full of information about match, forms for you to use as you document match, and places to look for more guidance if you come across anything you don't understand. We are also here, of course, to help along the way. The most important thing is to always ask questions if you don't understand something and make sure to alert us to any problems or changes as soon as they arise.

## Contracts

Sample Contracts included for your use:

### Consultant Agreement

Your organization may have a contract that you normally use – if so, that’s fine (but still review the important things to remember below). If you don’t, you can modify the contractor/consultant agreement on the following page to suit your needs.

### Gig Sheet

If you are hosting a musical event with multiple performances, this gig sheet & contract may work better than a regular contract. On the gig sheet, you can lay out performance dates and locations, as well as add production notes. Please remember to have the contract signed BEFORE the performance and BEFORE a check is issued.

If you have a contract as part of your budget, either for reimbursement or match, there are a number of important things to make sure of.

1. Make sure contracts are signed BEFORE checks are issued/dated.
2. Make sure the name on the contract matches the name on the check. If the contract is with a band but the check is issued to an individual, please make sure that individual’s name is noted on the contract along with the band’s name.
3. Make sure check amounts match the amounts specified in contracts.
4. If there are multiple payments on one contract, specify that in the contract.
5. If travel/hotel is being covered under the contract, include that information, as well as the dates of travel/hotel in the contract. We cannot count meals as match or reimburse for them. If the contract covers a band and individual band members are staying in hotel rooms/being reimbursed for travel, all band member’s names must be noted on the contract. Each individual’s name must also appear on the hotel folio sheet and match what appears on the contract.
6. If you are reimbursing travel in addition to the contract (e.g. mileage), please include a Google map documenting the mileage from the address listed on the contract to the location of the event/program.
7. Contracts require an invoice from the contractor and a legible copy of the cancelled check (front and back) to count as match.

ORGANIZATION NAME  
Contractor/Consultant Agreement

This agreement, together with the detailed information provided in the referenced attachments (if any), constitutes the entire consulting agreement between the ORGANIZATION NAME and \_\_\_\_\_ hereinafter referred to as the consultant and supersedes all prior agreements, either written or verbal. Consultant is not an employee or agent of ORGANIZATION NAME is a private contractor. Further, consultant agrees to indemnify, defend, and hold ORGANIZATION NAME harmless along with its trustees, officers, and employees for and from suit, liability, injury or other loss arising from the acts of the contractor, whether as the result of negligence or otherwise.

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Start date: \_\_\_\_\_ end date: \_\_\_\_\_

Section 1 – Description of Services: \_\_\_\_\_

Section 2 – payment rate and terms:

\$ \_\_\_\_\_ one-time payment or

\$ \_\_\_\_\_ per hour for \_\_\_\_\_ hours per week for \_\_\_\_\_ weeks

Will ORGANIZATION NAME be paying or reimbursing travel expenses?

no:

Yes:  \*\*if yes, provide detail in section 5

Section 3 – payment method: \_\_\_\_\_

Section 4 – consultant qualifications:  
\_\_\_\_\_

Section 5 – additional conditions or terms: \_\_\_\_\_

The signatures below indicate acceptance of this agreement as of the date specified.

Consultant

ORGANIZATION NAME

Signed: \_\_\_\_\_

Signed: \_\_\_\_\_

Name: \_\_\_\_\_

Name: \_\_\_\_\_

Phone: \_\_\_\_\_

Title: \_\_\_\_\_

Email: \_\_\_\_\_

Date: \_\_\_\_\_

Date: \_\_\_\_\_

REQUIRED DOCUMENTS:

- W-9 form
- Invoice upon project completion

**“Organization Name” Gig Schedule & Contract 2023**

**Performer or Group Name:** \_\_\_\_\_

**Members of Group:** \_\_\_\_\_

**Authorized Contact:** \_\_\_\_\_

**E-Mail:** \_\_\_\_\_ **Phone:** \_\_\_\_\_

**Address (City, State, Zip)** \_\_\_\_\_

DAY	DATE	TIME	EVENT	PLACE	FEE
Sat					
Sun					
Mon					
Tue					
Wed					
Thu					
Fri					
Sat					
			Total Performance Fees		
			Travel Reimbursement		
			Total		
				Paid Check #	
				Paid Check #	
			Balance		

**Production requirements:**

**Travel to be covered under contract including mileage:**

**Notes:**

**Performer:** \_\_\_\_\_

**Date:** \_\_\_\_\_

**Representative from Organization:** \_\_\_\_\_

**Date:** \_\_\_\_\_

## **Travel**

Many times, people must travel to complete work with a partner or a grantee. This travel is eligible to count as match /overmatch or may be submitted for reimbursement if it appears in your project budget. However, there are some important things to remember.

1. If the person traveling has a contract with your organization, the travel must be spelled out in the contract. Please check the contract carefully and make sure your organization's contract allows for travel – if it does not, we will not be able to reimburse you for travel expenses.
2. If someone is traveling to participate in an event/program/project and are staying in a hotel on days that they do not appear on an agenda/program/schedule, etc., (for example, they are performing on May 13, 15, 21 and staying in a hotel from May 13-22), the entire length of their hotel stay should be specified in their contract.
3. If you, another staff member, or a volunteer are completing travel for your organization that is laid out in your contract with the MSNHA but does not require a contract with an outside person, please include a written explanation of the travel, including dates/method of travel/location of travel in lieu of a contract, as well as the other back up required by each category below.
4. If mileage is being counted as match or is being r

## **Lodging**

If you are counting lodging of performers, speakers, etc. as match/overmatch or are submitting for reimbursement, please make sure you have the following information:

1. A contract with the person with dates of lodging specified
2. Lodging receipt proving payment that has the name of the guest listed – this name must match the name on the contract and show that payment has been made.
3. Copy of agenda/program/schedule/event announcement showing the person's involvement in the event/project/program
4. Brief explanation of why travel was necessary

## **Plane tickets**

If you are counting plane tickets for performers, speakers, etc. as match/overmatch or are submitting for reimbursement, please make sure you have the following information:

1. A contract with the person flying with the dates of travel specified
2. A receipt from the airline that shows the name of the person flying – this name must match the name on the contract and show that payment has been made.
3. Copy of agenda/program/schedule/event announcement showing the person's involvement in the event/project/program
4. Brief explanation of why plane tickets were necessary

## **Mileage**

When mileage is being submitted as match/overmatch or is being submitted for reimbursement, please submit the following:



1. A contract with the person driving with the dates of travel specified. If the person traveling is a member of your organization, a brief explanation of why the travel was necessary on an MSNHA timesheet will suffice.
2. A map (Google or Mapquest works fine) showing the starting and ending location of travel being counted as match. See page 10 for an example.
3. Copy of agenda/program/schedule/event announcement that shows why travel was necessary

### **Other travel expenses**

Other travel expenses may qualify as match/overmatch or may be reimbursed under your contract with the MSNHA – e.g. parking at airport or a taxi to and from the airport. Please submit the following:

1. Proof of payment (e.g. receipt, e-receipt)
2. Copy of agenda/program/schedule/event announcement



Work (Harrison Plaza) to Florence Indian Mound and Museum, 1028 S Court St, Florence, AL 35630

Drive 1.5 miles, 6 min

Meeting re: new museum tour, 8.3.2023



Harrison Plaza  
Florence, AL 35630

Continue to N Wood Ave

- 58 sec (0.1 mi)
- ↑ 1. Head east
- 79 ft
- ↪ 2. Turn right toward E Irvine Ave
- 404 ft
- ↶ 3. Turn left onto E Irvine Ave
- 217 ft

Continue on N Wood Ave to S Seminary St

- 4 min (0.9 mi)
- ↪ 4. Turn right onto N Wood Ave
- 0.8 mi
- ↪ 5. Turn right onto Veterans Dr
- 449 ft

Continue on S Seminary St to your destination

- 2 min (0.5 mi)
- ↶ 6. Turn left at the 1st cross street onto S Seminary St
- 0.3 mi
- ↶ 7. Turn left onto S Court St
- 0.2 mi
- ↪ 8. Turn right
- i** Destination will be on the right
- 226 ft

Florence Indian Mound and Museum  
1028 S Court St, Florence, AL 35630

## **Payment for Services**

If you are counting payment for services (for example, sound equipment or stage rental for a concert, or rental of a bus for a tour) to a company as match/overmatch or you are submitting for reimbursement, please make sure you have the following documents:

1. Original quote for services secured before event (for reimbursable expenses)
2. Invoice
3. Copy of cancelled check, front and back

Please remember:

1. The invoice must be dated before the date of the check and must provide a description of services.
2. The payment must match what is in your budget. If the amount due changes, please contact the MSNHA to adjust your budget accordingly ahead of your project end date.
3. If a company name is included in your budget, you must use that company.

## **Social Media Advertising**

If social media advertising appears in your budget, you will need to provide the following documents:

1. Proof of payment/receipt
2. Copies of social media advertisements.

## **In-kind Donations**

If someone is providing an in-kind donation of goods and services that you are counting as match or overmatch (you cannot be reimbursed for an in-kind donation), you must document this donation on an in-kind donation form. For example, if you are hosting an event in a city park and the city is providing a tent and chairs or if a local museum is giving your group comped admission, this is the form you need to use.

Things to remember:

1. The value of the donation should be equal to fair market value. What would it cost to obtain a similar good or service?
2. The value of the donation should be placed by the donor, and should not exceed fair market value.
3. If your in-kind donation includes comped admission, please include the number of people admitted and the normal cost of admission. Also, attach a list of names of people admitted to the form.



# MSNHA In-Kind Contribution/Donation Form

**Project/event name:**

**Organization name:**

- 1 Description of contribution:
  
- 2 Date(s) contributed:
  
- 3 Real or estimated value of contribution:
  
- 4 How was value determined?
  
- 5 Who made this determination?
  
- 6 Is there a restriction on the use of this contribution? No \_\_\_ Yes \_\_\_  
If "yes," what are the restrictions?
  
- 7 Was this contribution obtained with or supported by federal funds? No \_\_\_ Yes \_  
If "yes," list name of federal agency and grant or contract number:

Signature and date: \_\_\_\_\_

## MSNHA Timesheets

Hundreds of people contribute to the work of the MSNHA each year, generating hundreds of thousands of dollars in match. Properly documenting this time is very important.

Things to do:

1. Review your contract with the MSNHA! Your contract budget includes information about the amount of time volunteers, staff, or consultants will spend on a project, as well as the rate at which their time is to be valued.
2. Be sure that the time staff or volunteers are spending on the project is what is outlined in the contract budget. For example, if a volunteer is supposed to be working on event promotion according to the contract but instead works on event clean up, the time cannot be counted (unless you submit a budget revision request). Once confirmation has been received from MSNHA, the budget revision is allowed.
3. Time must be explained clearly. For example, if someone is working on an event promotion poster don't just write "event poster" – write "worked on designing event poster for XYZ event" or "reviewed and revised event poster for XYZ event" – the more detail, the better! Think about "who, what, when, why, where" when you write time entries.
4. If you attend a formal meeting or hold a meeting that lasts longer than an hour or hold a meeting that is shorter than an hour but involves more than two people, we need an agenda. If you attended the meeting, request an agenda from the meeting host. If you organize the meeting, you can make the agenda following the agenda template on page 16.  
If the meeting is shorter than an hour, use you can use the words "conversations, work sessions, appointment and contact" However, if conversations, work sessions, appointment and contact last more than 1 (one) hour and/or more than two people participated, an agenda is required and entries must also include the names of the other parties involved.
5. If you travel to a conference to make a presentation about the project the MSNHA and your organization are working on together, please include a copy of the conference program. The time you spend traveling cannot be used as volunteer time.
6. We cannot count the time of federal employees as match.
7. Remember, if you have changes that arise as your project moves forward – let us know! If your number of volunteers drops or you find you need more volunteers in one category than you do in another, we can make that adjustment as long as we know the changes before the end of the project period. Once confirmation has been received from MSNHA, the budget revision is allowed.

## **Volunteer time**

Volunteer time is important to the National Heritage Area program. Volunteer time shows community engagement with your project or organization. We track volunteer time at the MSNHA and every year we are able to show the National Park Service just how many thousands of hours volunteers are donating to projects! For such volunteer time to count as match volunteers must be working on projects directly related to the project activities – we cannot count “regular” volunteer time (e.g. answering phones, giving tours, providing lawn care for a historic site). Volunteer time is ordinarily calculated at \$23/hr.<sup>1</sup> Please make sure to check the volunteer box on the MSNHA timesheet. If the volunteer traveled to an event or a meeting, please include mileage as well as the starting/ending location on the timesheet. Mileage can be counted as match for the MSNHA as long as it appears in your contract. Travel time cannot be counted as match.

## **Paid time**

The time staff of your organization work on projects in partnership with the MSNHA may also be counted as match. Many of our partners contribute many hours working on projects with the MSNHA. This time, like that of volunteers, must be directly related to the project your organization and the MSNHA are working on together or is being funded through an MSNHA grant. On the MSNHA timesheet, please check the box “I completed this work while being paid by my employer.” It also asks for hourly rate. This information is kept confidential. Employee time traveling to work cannot be counted as match. However, if an employee makes a special trip for the project being conducted in partnership with the MSNHA or for a MSNHA grant, mileage can be counted as match. Work completed outside of regular hours will be counted at the \$23/hr volunteer rate.

## **Consultant time**

If you are a MSNHA consultant, you must report all time – paid and volunteer – on an MSNHA timesheet, broken down by project. Please check the consultant box on the MSNHA timesheet and include your rate. If the consultant traveled to an event, a meeting, or on a fieldwork trip, please include mileage as well as the starting/ending location on the timesheet. Mileage can also be counted as match for the MSNHA.

## **Group time**

If you have a group of people getting together to volunteer on a project or at an event, you can use the group timesheet. Make sure to document when people arrive and when they leave. You will also need to describe what they did. If people are working on different tasks, it may make

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<sup>1</sup> If a professional donates their services to a project, we may be able to value their time at the average professional rate for their occupation. The National Park Service uses the Bureau of Labor Statistics to calculate the value of professional services: [https://www.bls.gov/oes/current/oes\\_al.htm](https://www.bls.gov/oes/current/oes_al.htm). The MSNHA will work with you to determine if this valuation of volunteer time is applicable to your project.

sense to have them fill out an individual timesheet rather than the group timesheet. One of your organization's staff members or a board member must sign off on the group timesheets.



## Sample agenda

Organization name

Date

Meeting location

Start time/end time

1. Call to order
2. Introductions
3. Discussion point 1
4. Discussion point 2
5. Discussion point 3
6. Adjournment

Please attach:

1. List of attendees if you organized the meeting or co-hosted the meeting.
2. Explanation of the purpose of the meeting



**Thank you for reporting your time to the MSNHA!**

- Please complete timesheets with as much detail as possible, see example in each category.
  - You must report time on a daily basis.
  - As indicated, total the length of time and mileage amount columns.
  - If traveling within the same zip code, please list the start and end locations.
  - Travel time should not be included in length of time worked.
  - Attach supporting documentation when required. Examples include meeting agenda, conference program.
- If you have any questions, please contact the MSNHA Interim Director, TJ Johnson, tjohnson34@una.edu

**Name:** \_\_\_\_\_

**Signature:** \_\_\_\_\_

**Date:** \_\_\_\_\_

- I completed this work as a volunteer.
- I completed this work while being paid by my employer (non-federal payroll). My hourly rate is: \$ \_\_\_\_\_
- I am a MSNHA consultant and this work was volunteer time over my contracted time with the MSNHA. My hourly rate is \$ \_\_\_\_\_

<b>Date</b> <i>mm/dd/yy</i>	<b>Project</b>	<b>WorkDescription</b>	<b>LengthofTime</b>	<b>RoundTripMileage</b>	<b>Start&amp;Endzipcodes</b>
06/06/20 <b>EXAMPLE</b>	Trail Workdayz- Wildwood Park	Provided maintenance to the Wildwood Park, Mow/ cut weeds, brambles, briars, and high grass encroaching on the trail. <b>EXAMPLE</b>	2.50	10.00 <b>EXAMPLE</b>	35645 (Killen, AL) to 35630 (Florence, AL)
&					
<b>TOTAL</b>					

Date <i>mm/dd/yy</i>	Project	WorkDescription	LengthofTime	RoundTripMileage	Start/Endzipcodes
<b>TOTAL</b>					



Insert  
Logo  
Here

Partner name  
Partner Address  
Partner Email  
Partner Website

Muscle Shoals National Heritage Area

UNA Box 5231  
Florence, AL 353632-0001  
[msnha@una.edu](mailto:msnha@una.edu)  
msnha.una.edu

For collaborative heritage programming, the Muscle Shoals National Heritage Area may match its federal grant(s) with the fair value of contributed volunteers' time, hours worked on another organization's non-federal payroll, donated professional services, material goods and donated mileage, provided that the goods, services, and time are not reimbursed from a federally funded source. This private investment in heritage programs enables MSNHA to fulfill its requirement to match every federal dollar 1:1 with non-federal dollars and to continue working on important local programs.

**Organization Name**  
**Event/Meeting/Program Name Date**  
**Location**  
**Time Frame**

**WORK DESCRIPTION:**

This is where a detailed description of what the group will be doing and which services will be provided.

NAME	Subscribe to the MSNHA newsletter with email