Culture supports

Express Yourself, Beverly MA
The CIP Team

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Two new Program Officers starting March/April 2022
Today’s Agenda

• **What is the Cultural Investment Portfolio?**
  - The Portfolio and the Formula
  - What kinds of organizations are eligible

• **How do I get my FY22 grant?**

• **How do I get a grant for FY23?**
  - Annual Requirements: DataArts, and the CIP Annual Report
  - Policy requirements

• **Q & A**
Cultural Investment Portfolio: What is it?

Sara Glidden
What is “The Cultural Investment Portfolio”?

Non-traditional Operating Support program

- Unrestricted operating support grant
- Grant amount based on “Formula”
- Largest funding program at Mass Cultural Council
The Portfolio

• Started in FY 2010
• Currently 313 Organizations with long term, consistent Mass Cultural Council organization support funding history
• $6.2 million in grants in FY22
• Grants from $5,000 - $60,000

Also:
• FY22: 32 Gateway and 176 Project grants – for organizations not in the Portfolio
Basic eligibility requirements

• Fully cultural mission
• 501c3 organization, or meet Cultural Affiliate requirements (organizations with a parent 501(c)3
• Offer public cultural programming in Massachusetts annually, and maintain year-round operations
• Have minimum annual cash expenses of $50,000 based on a three-year average
• Commit to abide by state and federal regulations which bar discrimination
What is “The Formula”? 

Based on your ‘cash’ expenses as you reported in the DataArts Cultural Data Profile (more on that later)

• Doesn’t include in-kind expenses, or pass-through funds
• Based on a three-year average

Enchanted Circle Theatre, Holyoke MA
What makes the grant amount change?

• Your expenses increase or decrease relative to other organizations in the Portfolio

• The Council’s budget allocation increases or decreases (this is why advocacy is so important)

• FY21 & previous – 3 most recent completed/reported fiscal years
• FY22 grants – formula based on FY17, FY18, FY19
• FY23 grants – 3 most recent completed/reported fiscal years
Temporary changes to requirements

• Engagement Requirement has been suspended for FY22.

• If a grantee organization falls below $50,000 in formula expenses due to their FY20 or FY21 financial data as reported in their DataArts Funder Report, that organization will not be suspended from the Portfolio as is currently stated in the guidelines.

• Requirements for 1:1 match have not changed.
How do I get my FY22 grant?

Grant contract is AVAILABLE NOW in the SmartSimple account for your official CIP contact person.

That is the ONLY person who can download the contract.

Download the contract and MAIL it with all of the additional forms (EFT, W-9) to Mass Cultural Council attn: Cyndy Gaviglio

If you didn't get an email, or you can't see your contract in your profile, we might have the wrong people listed as the official contact.

Contact Sara or Kalyn to get the correct information in the new system.
How do you get your contract?

https://massculturalcouncil.org/about/contracts/

Check your payment status and payment history:

Payment schedule information and payment history is available through the state's web site.
How do I get a grant for FY23?

Kalyn King
Annual reporting requirements

1. Data Profile & Funder Report
   via SMU DataArts - culturaldata.org/

2. Annual Report
   via new grants management system - MassCulturalCouncil.SmartSimple.com
Reporting timeline

Data Profile & Funder Report

• Available now
• Complete requirement by your month deadline (approximately 9 months after your fiscal year ends)

Annual Report

• Available now
• WAIT until May to fully complete

BOTH reports are due May 31, 2022 (11:59PM EDT) to avoid a penalty to your FY23 grant.
Possible penalties to your grant

• If you do not complete all requirements by the deadline, there will be a 25% penalty to your grant for the following year.

• You have an extension for additional week, to June 7. If you still haven’t completed your requirements by this time, your organization will be suspended and not receive a grant for the following fiscal year.
Can we get an extension?

- No extension for the Annual Report – MUST be completed by May 31, 2022 at 11:59pm ET to receive FY23 grant without penalty
- DataArts – possible extension for COVID related reporting to September 30, 2022
- All extension requests and materials due by May 31, 2022
  - Letter requesting extension
  - Letter from your auditor, explaining the COVID related reason for the delay
  - Unaudited financial statements for the correct fiscal year

DataArts Funder Report MUST be completed by Sept. 30 to receive an FY23 Portfolio or Gateway grant
SMU DataArts Requirement

• Step 1: Complete the Cultural Data Profile for your most recently closed out fiscal year
  o FY21 for most; FY20 for some

• Step 2: Generate a Portfolio Funder Report
  o Review the final Funder Report for accuracy of data

• Step 3: Portfolio Staff Approval
Need help?

DataArts Support Center
Hours: M-F 9am – 8pm
• Email: help@culturaldata.org
• Phone: (877) 707-DATA
  ○ (877) 707-3282

Website
• http://www.culturaldata.org/

Knowledgebase
• https://culturaldata.org/learn/educational-resources/

Training calendar
• http://culturaldata.nonprofitsoapbox.com/calendar
Getting Started with The Cultural Data Profile - Webinar - (February 24, 2022 @ 4pm ET)

This webinar will cover the basics of completing your Cultural Data Profile (CDP) on the SMU DataArts platform and applying to participating grantmakers.

We’ll also go over changes made to the CDP in December 2020 to better track your activities through the COVID-19 pandemic, share free tools to analyze your data, and discuss examples of recent research enabled by CDP data.

This session is ideal for new users, or anyone looking for a refresher about how to enter your data and create a Funder Report for a grant deadline. (1 hour)
Annual Report

• via MassCulturalCouncil.SmartSimple.com
  - Open now

Berkshire Pulse, Housatonic MA, Gateway grantee
Requires Attention

Please find your agreements, and reports below.

0  Contract Package
1  Pending Reports
20 Submitted Activities
0  CIP Engagements

Change Requests

Click below to create, view, submit your change request.

0 0 0 0
## Pending Reports

<table>
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<td>FY22-CI-CIP-2786</td>
<td>CIP Portfolio</td>
<td>05/31/2022</td>
</tr>
</tbody>
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Open
FY22-CI-CIP-2786 - Annual Report - CIP - CIP Portfolio

* Due Date: 05/31/2022

**ATTESTATIONS**

By clicking "I Confirm" below, you attest that your organization continues to meet the following eligibility requirements and expectations annually.

- Have a 501(c)3 designation with the Internal Revenue Service which is currently active and has not been revoked, OR meet the requirements of a "Cultural Affiliate." (Any organization incorporated outside of Massachusetts must have a current certificate of registration from the Secretary of the Commonwealth to operate as foreign corporation within the Commonwealth of Massachusetts.)
- Be a "fully cultural" organization.
- Offer public cultural programming in Massachusetts annually and maintain year-round operations.
- Credit the Mass Cultural Council in all print, audio, video, internet, and publicity materials, as per the Credit & Publicity Agreement.
- Conduct at least two advocacy activities with the Governor of the Commonwealth or a current member of the Massachusetts Legislature.

The Mass Cultural Council and its grantees are contractually committed to abide by state and federal regulations which bar discrimination on the basis of race, gender, religious creed, color, national origin, ancestry, disability, age, gender identity, or sexual orientation, and which require accessibility for persons with disabilities. The Mass Cultural Council and its grantees are expected to be in compliance with:

The Americans with Disabilities Act of 1990 (ADA)
Annual Report

• Attestations
  o Eligibility, compliance with Anti-Discrimination requirements, confirmation of advocacy activities, Credit & Publicity agreement, and other policies

• Ethics & Accountability

• Organization Contact Information

• Organization Review
  o Mission, core programming

• NEA Details

• NEA Activity Location Information
Credit & Publicity

Don’t forget - we have a new logo!

Must be used:

- Online, linked to www.massculturalcouncil.org
- Programs, playbills, marketing materials
- Donor recognition and other sponsorships
Advocacy

Conduct two advocacy activities

Needs to occur between July 1 - June 1 each year

• Direct interaction
• State senators, state representatives, or the Governor
• Advocate on behalf of the cultural sector, not for an individual organization

Stay informed with Mass-Creative.org
Standards for ethical governance and operation

All Portfolio grantees will be required to have

• Annual Board approval of policy on ethics and best practices for boards.

• a policy on Sexual Harassment – a state law for organizations with 6+ employees

An organization that does not have these policies in place by that time will have a “Hold” on their grant contract for FY23.

The Ecotarium
Resources for these requirements

Anti-Sexual Harassment Policies


NEA Sections

• NEA Details
  o NEA Primary Strategic Outcome
  o Population Benefited
    • Adults/children; Age groups
    • "Artists"
    • Race / Ethnicity
    • Distinct groups

• NEA Activity Location Information
FY22 Additional programs

• **Data at Work: Introduction to DataArts Analytic Tools – Webinar**
• **March 9nd at 2pm**
• Once you have completed a Cultural Data Profile, the SMU DataArts platform offers a wealth of reporting tools. This webinar will cover the basics of running analytic reports, whether you want to run a trend report to see changes at your organization over time or a comparison report to benchmark against a group of peer organizations. The webinar will also include a brief overview of SMU DataArts’ national research and tools which can put your data into context. (1 hour)
FY22 Additional programs, continued

• **Assessing Organizational Performance with the Key Intangible Performance Indicators (KPIs) - Webinar**

  • **April 13th at 2pm**
  • As organizations determine a new normal after the COVID-19 global pandemic, KPIs can be used to help guide discussions and focus on goals. The KIPI Dashboard is an analytic tool powered by data entered in the Cultural Data Profile survey that offers insights into your organization’s unique strengths and areas for potential growth.
  • We will provide an overview of the tool and explain how to read your scores for a deeper understanding of how intangible aspects like good decision-making, intellectual capital, reputation, and relationships drive performance. You will also learn how to use the KIPI Dashboard to inform strategic discussions and data-driven planning with leadership and key stakeholders. (1 hour)
To register:

https://massculturalcouncil.org/culture-now/agency-dates/
Questions?

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Thank you!