



# Culture supports



*Power of culture*

Express Yourself,  
Beverly MA

# The CIP Team

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Two new Program Officers  
starting March/April 2022

# Today's Agenda

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- **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?

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Sara Glidden



# What is “The Cultural Investment Portfolio”?

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## **Non-traditional Operating Support program**

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

# The Portfolio

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- 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

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- Fully cultural mission
- 501(c)3 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”?

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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?

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- 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

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- 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?

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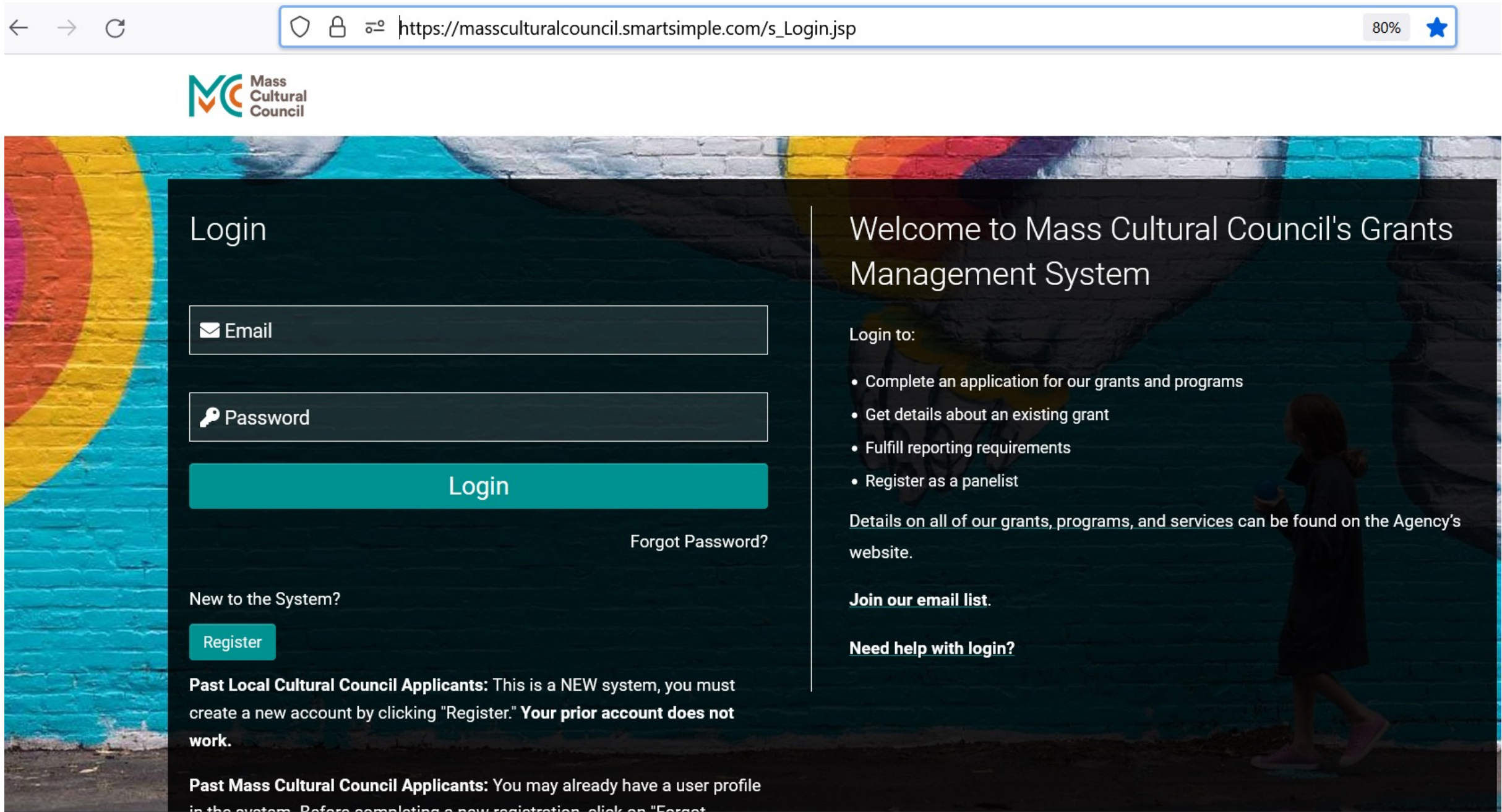
Grant contract is AVAILABLE NOW in the SmartSimple account for your official CIP contact person.

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?


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3


Current Opportunities

329


Apply to a Local Cultural Council



My Profile



Organization Profile



Change Password

Applications

Please find your applications below.

0

In Progress

0

Submitted

6

Approved/Declined

0

Payments

Requires Attention

Please find your agreements, and reports below.

1

Contract Package

0

Pending Reports

4

Submitted Activities

0

CIP Engagements

Change Requests

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

<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?

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Kalyn King

# Annual reporting requirements

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Northeast Document Conservation Center,  
Andover MA

**1. Data Profile & Funder Report**  
via SMU DataArts - [culturaldata.org/](http://culturaldata.org/)

**2. Annual Report**  
via new grants management system -  
[MassCulturalCouncil.SmartSimple.com](http://MassCulturalCouncil.SmartSimple.com)

# Reporting timeline

## Data Profile & Funder Report

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- 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

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- 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

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## SMU DataArts

- Step 1: Complete the Cultural Data Profile for your most recently closed out fiscal year
  - FY21 for most; FY20 for some
- Step 2: Generate a Portfolio Funder Report
  - Review the final Funder Report for accuracy of data
- Step 3: Portfolio Staff Approval

# Need help?

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## DataArts Support Center

Hours: M-F 9am – 8pm

- Email: [help@culturaldata.org](mailto: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)

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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

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**Berkshire Pulse**, Housatonic MA,  
Gateway grantee

- via  
[MassCulturalCouncil.SmartSimple.com](https://MassCulturalCouncil.SmartSimple.com)
  - Open now



## 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

# Pending Reports

1-1 of 1

#	Activity Type	Application ID	Application Type	Due Date	
 1	Annual Report	FY22-CI-CIP-2786	CIP Portfolio	05/31/2022	<div>Open</div>



# Annual Report

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- **Attestations**
  - Eligibility, compliance with Anti-Discrimination requirements, confirmation of advocacy activities, Credit & Publicity agreement, and other policies
- **Ethics & Accountability**
- **Organization Contact Information**
- **Organization Review**
  - Mission, core programming
- **NEA Details**
- **NEA Activity Location Information**



# Credit & Publicity

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Don't forget - we have a new logo!

Must be used:

- Online, linked to [www.massculturalcouncil.org](http://www.massculturalcouncil.org)
- Programs, playbills, marketing materials
- Donor recognition and other sponsorships

# Advocacy

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**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](https://mass-creative.org)

# Standards for ethical governance and operation

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The Ecotarium

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.

# Resources for these requirements

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## Anti-Sexual Harassment Policies

<https://www.mass.gov/service-details/about-sexual-harassment-in-the-workplace>

**Introduction to Board Governance Best Practices  
webinar** <https://youtu.be/LDRjyuLuG6I>

& <https://www.mass.gov/ago/docs/nonprofit/guide-for-board-members.pdf>

# NEA Sections

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- **NEA Details**
  - NEA Primary Strategic Outcome
  - Population Benefited
    - Adults/children; Age groups
    - "Artists"
    - Race / Ethnicity
    - Distinct groups
- **NEA Activity Location Information**

# FY22 Additional programs

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- **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

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- Assessing Organizational Performance with the Key Intangible Performance Indicators (KIPIs) - Webinar
- **April 13th at 2pm**
- As organizations determine a new normal after the COVID-19 global pandemic, KIPIs 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:

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<https://massculturalcouncil.org/culture-now/agency-dates/>

# Questions?

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# Thank you!

Keith Lockhart,  
Conductor of the  
Boston Pops

