

A woman in a vibrant, fringed costume made of long, colorful threads (pink, purple, and blue) is performing on stage. She has her arms raised, and the fringes are blowing in the air. Behind her, a band of four people is seated with various drums, including djembes and congas. They are wearing black t-shirts with the word "ALIVE!" printed on them. The background features a large screen displaying abstract, colorful patterns in shades of green and blue. The stage is lit with purple and blue lights. The overall scene is a dynamic cultural performance.

# Culture supports



*Power of culture*

Express Yourself,  
Beverly MA

# Today's session is Captioned Live

Thank you to Partners Interpreting for providing captioning (Paola Yañez) and ASL interpretation (Amanda Sechow) today.

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If you would like to follow the captions during this presentation:



- To follow the captions in a separate device or new window: <https://www.streamtext.net/player?event=MCC>
- To follow the ASL interpretation, "pin" Amanda Sechow
- Please post questions in the Q&A.
- Session is being recorded, and a link and slide deck will be posted on our website in a few days.



# The CIP Team



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# 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 FY23 grant?**
- **How do I get a grant for FY24?**
  - Annual Requirements: DataArts and the CIP Annual Report
  - Policy requirements
- **What is happening for the future of the Portfolio?**
- **Q & A**

# What is “The Cultural Investment Portfolio”?

5

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

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

# The Portfolio

6

- Started in FY 2010
- Currently 321 Organizations with long term, consistent Mass Cultural Council organization support funding history
- \$6.9 million in grants in FY23
- Grants from \$6,000–\$60,000

## **Also:**

- Also - 22 Gateway and over 500 Festivals & 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 & FY24 grants – 3 most recent completed/reported fiscal years

# Temporary changes to requirements through FY24

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- 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.

# How do I get my FY23 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 person listed as the official contact.

Contact us to correct the contact information in SmartSimple.



## Login

Email

Password

Login

[Forgot Password?](#)

New to the System?

Register

**Past Local Cultural Council Applicants:** This is a NEW system, you must create a new account by clicking "Register." **Your prior account does not work.**

**Past Mass Cultural Council Applicants:** You may already have a user profile in the system. Before completing a new registration, click on "Forgot

## Welcome to Mass Cultural Council's Grants Management System

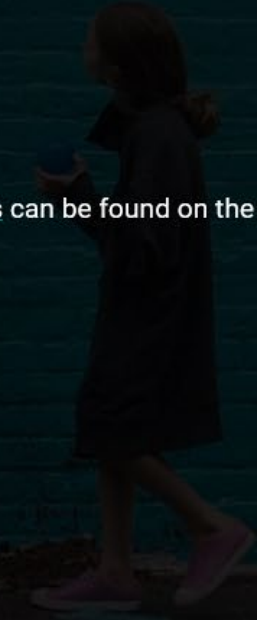
Login to:

- Complete an application for our grants and programs
- Get details about an existing grant
- Fulfill reporting requirements
- Register as a panelist

Details on all of our grants, programs, and services can be found on the Agency's website.

[Join our email list.](#)

[Need help with login?](#)



# How do you get your contract?

**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](#).**



# Annual reporting requirements

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

**2. CIP Annual Report**  
via SmartSimple grants management system -  
<https://MassCulturalCouncil.SmartSimple.com>

Northeast Document Conservation Center,  
Andover MA

# Reporting timeline

## Data Profile & Funder Report

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- Available now – Start it now!
- Complete requirement by your month deadline (approximately 9 months after your fiscal year ends)

## Annual Report

- Available now
- We prefer that you WAIT until May to fully complete

**BOTH reports are due **May 31, 2023 (11:59PM EDT) to avoid a penalty to your FY24 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?

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- No extension for the Annual Report – MUST be completed by May 31, 2023 at 11:59pm ET to receive FY23 grant without penalty
- DataArts – possible extension for COVID related reporting to September 30, 2023
- **All extension requests and additional materials due by May 31, 2023:**
  - 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 FY24 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
  - FY22 for most; FY21 for some
- Step 2: Generate a Portfolio Funder Report to "CIP: Portfolio Grantees FY23 year end report/FY24 application (10/01/2022 - 05/31/2023)"
  - Review the final Funder Report for accuracy of data
- Step 3: Portfolio Staff Approval
  - CIP staff might contact you to request corrections/revisions



# DataArts Funder Report Approved

19



✓ **DataArts Funder Report Information**

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Below you will find information regarding your DataArts reporting requirement.


**DataArts Funder Report Deadline**

This is the month your CDP Report is due.

January  



**DataArts Fiscal Year Required**

This is the fiscal year you should report on in your current DataArts Funder Report.

FY22 

**Date DataArts Funder Report Approved**

This is the date that Mass Cultural Council staff approved your submitted DataArts Funder Report.

mm/dd/yyyy  

[← BACK](#)

DataArts requirement information can be found in your Organization Profile under the "CIP Portfolio Information" tab.

# Need help?

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## DataArts Support Center

Hours: M-F 10:30am – 7pm

- 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>

# Additional resources at DataArts

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- See the DataArts website for information on additional resources:
- Workshops
- Data Literacy
- KIPI Dashboard
- Reports on the cultural sector

# Getting Started with The Cultural Data Profile - Webinar - (March 7, 2023 @ 1pm 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.

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)

<https://culturaldata.secure.nonprofitsoapbox.com/calendar>

# CIP Annual Report

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

- via <https://MassCulturalCouncil.SmartSimple.com>
  - Open now
  - Reporting on the grant period (July 1, 2022–June 30, 2023)



## 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

 × 🔍 1-2 of 2 < >

#	Activity Type	Application ID	Application Type	Due Date	
 1	Final Report	FY23-UP-INF-51344	Universal Participation Innovation Fund	07/14/2023	<a href="#">Open</a>
 2	Annual Report	FY23-CI-CIP-21642	CIP Portfolio	05/31/2023	<a href="#">Open</a>

# FY23-CI-CIP-21642 - Annual Report - CIP - CIP Portfolio

More...

\* Due Date: 05/31/2023

Report Summary

- < **ATTESTATIONS**
- ETHICS & ACCOUNTABILITY
- ORGANIZATION CONTACT INFORMATION
- ORGANIZATION REVIEW
- BIPOC-CENTERED SELF-IDENTIFICAT >

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.
- Have a designated Accessibility Coordinator as required by the Civil Rights Office of the National Endowment for the Arts.
- 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 \(ADA\)](#)
- [Section 504 of the Rehabilitation Act of 1973 \(Section 504\)](#)
- [Title VI of the Civil Rights Act of 1964](#)
- Other applicable state and local laws

NEXT >

Save Draft    ✓ Submit



# CIP Annual Report Tabs

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- **Attestations**
  - Confirming your organization's: eligibility, compliance with Anti-Discrimination requirements, advocacy activities, Credit & Publicity agreement, and other policies
- **Ethics & Accountability**
- **Organization Contact Information**
  - Executive Director, CIP Grant Manager, etc.
- **Organization Review**
  - Share significant changes to your mission; update core programming
- **NEA Section (Activity Location Information)**

# 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 May 31, 2023, will have a “Hold” on their grant contract for FY24.

# 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>

& the [Guide for Board Members of Charitable Organizations](#)

# Credit & Publicity

30



Please use the current logo!

Must be used:

- Online, linked to [Credit Logos Webpage](#)
- Programs, playbills, marketing materials
- Donor recognition and other sponsorships





# Advocacy

31

Conduct two [advocacy activities](#)

Needs to occur between July 1 and June 1 in the current fiscal year

- Direct interaction
- State senators, state representatives, or the Governor or Lt. Governor's offices
- Advocate on behalf of the cultural sector, not for an individual organization

Stay informed with [MASSCreative](#)

# NEA Section

32

- **NEA Activity Location Information**
- **Federal Funds report** – only some organizations. You will be notified of this requirement. Contact Sara Glidden if you have questions.

# Changes to the Portfolio

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Portfolio to become a 5-year funding commitment

Current Portfolio grantees to be randomly assigned to a year for their re-application

Notification of your organization's year to reapply by June 30, 2023

Applications to start in FY24, for grants starting in FY25

More details to be announced in FY24

# Questions?



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# Thank you!

Keith Lockhart,  
Conductor of the  
Boston Pops

