

Project Grant Important Information – A Must Read

Congratulations on receiving a project grant from Mass Humanities. Below you will find information you will want to acquaint yourself with right away.

How to get money from us?

- a. Of course, before we can send you money we need certain things from you. The project director is assigned certain reports in the [online application system](#) which we require to disburse funds to you and to successfully close the grant.
- b. Disbursements go like this:
For grants up to \$5,000: we will make two payments: 90% and 10%.
For grants over \$5,000, we will make three payments: 45%, 45%, and 10%.
- c. We will send you the first payment upon receiving the assigned Project Grant Initial Award Packet online which consists of uploading the signed grant award letter and *Assurance of Compliance* form we emailed you. For all project grants, we hold the final 10% until the project is completed and all final reports have been submitted and approved. This means that grantees finish paying their project expenses in anticipation of being reimbursed for the last 10% of their Mass Humanities grant.
- d. Please allow four to six weeks from the time you request a check until you receive it. If you have questions about a payment, contact Melissa Wheaton at mwheaton@masshumanities.org; 413-584-8440 x100).
- e. The interim and financial expenditures report forms must be signed by both the project director and fiscal agent/treasurer with the original sent to Mass Humanities.

What if our budget changes?

The project fiscal agent/treasurer should be aware of the limitations on grant funds which are listed on page two of the General Grant Provisions. **If you introduce significant changes to your budget** during the grant period (adding or eliminating line-items, or spending \$500 more or less than anticipated on your original budget form), **we require an official request** which explains all such changes. Contact Melissa Wheaton and she will assign you a budget change request form to your online account. Submit the request there and we will review it and get back to you. Submitting an official request before you submit your final report will expedite final payment of your grant.

What if our project changes?

Material changes from the Mass Humanities approved project require prior approval as set forth in the award letter. Contact your program officer at Mass Humanities to discuss the possibility.

Can't meet the reporting deadlines?

If you are unable to complete your final reporting documents by the grant expiration date, please contact [Melissa Wheaton](#) to request an extension at least two weeks in advance of the final due date. Melissa will assign you an extension request form to your online account. Submit the request there and we will review it and get back to you. Extensions may be granted depending upon what funding source funded your grant, in 3, 6, 9 and 12 month periods.

What if our money earns interest while in your hands?

Any interest earned with Mass Humanities funds must be sent to Mass Humanities who, in turn, must send it to NEH.

What do we do when our public events get scheduled or change?

Please submit details for any public event once it is confirmed. The best way to do this is to submit the item via our [event calendar submission form](#). If once submitted via the form and details change later, email Melissa Wheaton at mwheaton@masshumanities.org.

What are all these documents you sent us and what do we do with them?

Award letter - Signatures are required on all lines. Scan or use our online Fax-to-File service and upload [online](#). This is required in the Initial Award Packet Report assigned to you online.

Assurance of Compliance with Civil Rights Statutes Form – The grants authorizing official must sign this form. Scan or use our online Fax-to-File service and upload. This is required in the Initial Award Packet Report assigned to you online.
(masshumanities.org/files/grants/onlineapp/compliance.pdf)

Interim Financial Expenditures Report - For grantees receiving over \$5,000 only, this report is assigned to you online, must be submitted in order to receive the second 45% of the grant award. This includes a brief progress report and the interim expenditures report form and is only expected if assigned to you online.
(Excel: masshumanities.org/files/grants/onlineapp/pg_interimexp.xls
Word: masshumanities.org/files/grants/onlineapp/pg_interimexp.doc)

Factual Report - An upload required in the final report assigned to you. Please familiarize yourself immediately with the kind of evaluation information and statistics we need (i.e. audience numbers). It is important to keep an accurate record of this information from the very beginning of the project. (masshumanities.org/files/grants/factual.doc)

Final Expenditures Report – An upload required in the final report assigned to you.
(Excel: masshumanities.org/files/grants/onlineapp/pg_finalexp.xls
Word: masshumanities.org/files/grants/onlineapp/pg_finalexp.doc)

Scholar Evaluation – This simple online form will be sent by the project director when completing the final report online. The scholar will receive an email to a simple online evaluation that will be submitted directly to Mass Humanities. The grant is not considered successfully closed until we receive this from the scholar and the final report online has been accepted.

Audience Participation Survey – A form provided for projects for which it is appropriate. Completed forms should be sent to our office via U.S.P.S.
(masshumanities.org/files/grants/onlineapp/participant_survey.pdf)

Sample Letter to Legislator - Using the sample letter provided, all grantees should acknowledge the grant to their state representatives and senators.
(masshumanities.org/files/grants/onlineapp/sample_legisltr.doc)

General Grant Provisions – Please read and keep for your records.
(masshumanities.org/files/grants/ggp.pdf)

Staff List: Send *all* publicity for the Mass Humanities funded project to our staff on this list.
(masshumanities.org/files/grants/stafflist.doc)

What reports do you require?

Initial Award Packet Report includes:

- Signed Award Letter
- Signed Assurance of Compliance Form

Interim Report (not required of everyone):

- Interim Financial Report
- Brief Progress Report

Final Report Includes:

- Evaluation/Narration for Project Director (in the final report form online, not an attachment)
- Final Expenditures Report
- Scholar Evaluation
- Factual Report
- Audience Participation Surveys (if applicable)
- List of participants and addresses (if applicable)
- Project Publicity

A final report, consisting of several documents (listed above), is required of all grantees, regardless of grant amount. It is due one month after the end of the grant term.

Interim reports, for grants over \$5,000, should be sent when the second 45% of the award is required and consist of an interim expenditures report and a narrative report on the progress of the project so far.

For the financial reporting, be sure to keep a simple but clear set of books on income and expenses, with supporting documents. Also keep track of in-kind contributions of services and facilities. In other words, you will need to verify your match. Regarding contributed services, a simple signed statement on paper will do (e.g., I contributed "X" hours of service at "Y" dollars per hour in the period from "this" date to "that" date, signed "so-and-so"). This documentation need not be submitted with the final report, but it is important you keep it because our funders may require Mass Humanities to audit several grantees' books. If you receive a total of \$700,000 or more in federal funds in a fiscal year, you are required to have an A-133 audit and submit a copy to Mass Humanities.

(revised: 11/02/2016)