



Streamlined Cultural Data Profile (CDP) – for Audited Organizations

To be released late 2020

SMU DataArts is planning to streamline the CDP to make data entry easier for arts and cultural organizations, while preserving the data points used to generate valuable insights for all of our stakeholders.

This document provides:

- the full list of questions included in the streamlined CDP for who receive an audit or review from a nonprofit accounting firm,
- an overview of what's changed in each section

Documentation of definitions, error checks, and migration of data from the current CDP to the new version will be provided in Fall of 2020.

This version of the CDP is specific to organizations who receive an audit or review from a nonprofit accounting firm. For other versions of the streamlined CDP and up to date information about this project visit: <https://culturaldata.org/pages/cdp-survey-streamline/>

Revenue

This section is required. You must report revenue, but lines that are not applicable to your organization can be left blank. Any specific lines or questions that must be answered are noted.

Revenue Set-up

Do you have non-operating revenue?

- Yes
- No

What's different in this section:

-The earned revenue section has been reduced from 30 lines to 15.

- The contributed revenue section is largely unchanged. It is one of the most frequently used sections in our reports and research.

-We have added a Special Events Revenue (Gross) line in Contributed Revenue.

Revenue totals (Required) *

*These amounts should be taken directly from your audit or review. The totals that calculate at the bottom of the revenue section will be verified against these totals.

	Unrestricted	Restricted
Total Operating Revenue	\$	\$
Non-Operating Revenue	\$	\$
Total Revenue	calc.	calc.

Earned Operating Revenue

	Unrestricted	Restricted
Subscription Revenue	\$	\$
Membership Fees - Individuals	\$	\$
Membership Fees - Organizations	\$	\$
Ticket sales/Admissions	\$	\$
Education Revenue	\$	\$
Publication sales	\$	\$
Gallery Sales	\$	\$
Contracted services and touring fees	\$	\$
Royalty/reproduction revenue	\$	\$
Rental Revenue	\$	\$
Sponsorship Revenue	\$	\$
Attendee-generated revenue not listed above	\$	\$
Earned program revenue not listed above	\$	\$
	<i>text box for description</i>	
Earned non-program revenue not listed	\$	\$
	<i>text box for description</i>	
Total Earned Operating Revenue	calc.	calc.

Digital Program Revenue

Of your organization's total earned operating revenue, how much was from programming delivered via digital means?

\$

Investment Revenue

	Unrestricted	Restricted
Investment Revenue - operating	\$	\$
Investment Revenue - non-operating	\$	\$
TOTAL INVESTMENT	calc.	calc.

Non-Operating Revenue

* This section will be hidden if the answer to "Do you have non-operating revenue?" is no.

	Unrestricted	Restricted
In-kind non-operating Revenue	\$	\$
Other Non-operating Revenue	\$	\$
	<i>(text box for description)</i>	
TOTAL NON-OPERATING REVENUE	calc.	calc.

Contributed Revenue

	Unrestricted	Restricted *	Total	Contributors
Trustee/Board	\$	\$	calc.	#
Other Individual	\$	\$	calc.	#
Corporate	\$	\$	calc.	#
Foundation	\$	\$	calc.	#
City Government	\$	\$	calc.	#
County Government	\$	\$	calc.	#
State Government	\$	\$	calc.	#
Federal Government	\$	\$	calc.	#
Tribal	\$	\$	calc.	#
In-Kind contributions	\$	\$	calc.	
Parent org support	\$	\$	calc.	
Special fundraising events	\$	\$	calc.	

Is the amount reported for special fundraising events gross or net?

- Gross
- Net

Fundraising event expenses (if reported as net)

\$

Contributions not listed above

\$	\$	calc.
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(text box for description)

Net Assets Released from Restriction

\$	\$	calc.
----	----	-------

TOTAL CONTRIBUTED

calc.	calc.	calc.	calc.
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Digital Program Revenue

Of your organization's total contributed revenue, how much was associated with programming delivered digitally?

\$

Capital Campaign

Is your organization currently in a capital campaign?

- Yes
- No

Total Revenue

	Unrestricted	Restricted
Total Operating Revenue	\$	\$
Non-Operating Revenue	\$	\$
Total Revenue	calc.	calc.

Funder report narrative - Revenue

text box

***This space can be used to add context, explanation, or narrative about your revenue. This text will appear on your reports to Funders. This narrative is optional.**

Expenses

This section is required. You must report expenses, but lines that are not applicable to your organization can be left blank. Specific lines that are required are noted below.

Expense Set-up

Do you have non-operating expenses? (required)

- Yes
- No

What's different in this section:

- We've reduced the line items in this section from 37 to 18.

Expense totals* (required)

*These amounts should be taken directly from your audit or review. The totals that calculate at the bottom of the revenue section will be verified against these totals.

Program Expenses	\$
Fundraising Expenses	\$
Management and General Expenses	\$
Total Operating Expenses	calc.
Non-operating Expenses	\$
Total Expenses	calc.

Personnel Expenses

	Program	Management and General	Fundraising
W2 Employee Salaries, Benefits, Independent Contractors	\$	\$	\$
Professional Fees	\$	\$	\$
TOTAL PERSONNEL	calc.	calc.	calc.

Visual/Performing Artists

Of your organization's total personnel expenses above, what portion was paid to artists and performers?

\$

Non-Personnel Expenses

	Program	Management and General	Fundraising
Occupancy	\$	\$	\$
Interest Expense	\$	\$	\$
Depreciation	\$	\$	\$
Non-Personnel expenses not listed above	\$	\$	\$

Key to data entry:
Enter text = text

Calculated automatically = calc
Enter a percentage = %

Dollar amount = \$
Non-dollar number = #

TOTAL NON-PERSONNEL

<i>(text box for description of expenses not listed above)</i>		
calc.	calc.	calc.

Total Operating Expenses

Total Personnel

Total Non-Personnel

TOTAL OPERATING EXPENSES

calc.
calc.
calc.

Marketing Expenses

Of your organization's total operating expenses, how much was spent on marketing personnel and non-personnel expenses? (Required)

Personnel

Non-Personnel

\$
\$

Digital Program Expenses

Of your organization's total operating expenses, how much was for programming delivered via digital means?

\$

Non-operating Expenses

* This section will be hidden if the answer to "Do you have non-operating expenses?" is no.

Personnel

Non-personnel

TOTAL NON-OPERATING

\$
\$
calc.

Total Expenses and Change in Net Assets

	Program	Management and General	Fundraising
Total Operating Expenses	\$	\$	\$

Total Non-Operating Expenses

\$

Total Operating and Non-Operating Expenses

\$

Change in Net Assets

	Unrestricted	Restricted
Total Operating Revenue	calc.	calc.
Total Operating Expenses	calc.	calc.
Operating Change in Net Assets	calc.	calc.

Total Non-Operating Revenue	calc.	calc.
Total Non-Operating Expenses	calc.	calc.
Non-Operating Change in Net Assets	calc.	calc.
Total Change in Net Assets	calc.	calc.

Funder report narrative - Expenses

text box

* This space can be used to add context, explanation, or narrative about your expenses. This text will appear on your reports to Funders. This narrative is optional.

Balance Sheet

This section is required for audited organizations. Lines that are not applicable to your organization can be left blank.

What's different in this section:

- We've reduced the lines in this section from 23 to 16.
- We have removed the Loans, Fixed Asset, and Endowment

Balance Sheet Set-up

Balance Sheet Totals*

*These amounts should be taken directly from your audit or review. The totals that calculate at the bottom of the balance sheet section will be verified against these totals.

Total Assets	\$
Total Liabilities and Net Assets	\$
Net Assets - Unrestricted	\$
Net Assets - Restricted	\$

Balance Sheet

Assets

	Unrestricted	Restricted
<i>Current</i>		
Cash and Cash Equivalents	\$	\$
Receivables	\$	\$
Investments - current	\$	\$
Current assets not listed above	\$	\$
	text box for description	
Total Current Assets	calc.	calc.
<i>Long-term/Non-Current assets</i>		
Investments - Non-current	\$	\$
Fixed assets (net of accumulated depreciation)	\$	\$
Non-current assets not listed above	\$	\$
	(text box for description)	
Total Long-term/Non-Current Assets	calc.	calc.
Total Assets	calc.	calc.

Fixed Asset Details - of Fixed assets (net of accumulated depreciation)

Gross Fixed Assets	\$
Accumulated Depreciation	\$

Key to data entry:
Enter text = text

Calculated automatically = calc
Enter a percentage = %

Dollar amount = \$
Non-dollar number = #

Liabilities

Current Liabilities

Accounts payable	\$	\$
Deferred revenue	\$	\$
Loans - Current	\$	\$
Additional Current Liabilities Not listed above	\$	\$
	(text box for description)	
Total Current Liabilities	calc.	calc.

Long-term/Non-Current Liabilities

Loans - Long-term/Non-current	\$	\$
Additional Long-term/Non-current liabilities not listed above	\$	\$
	(text box for description)	
Total Long Term/Non-Current Liabilities	calc.	calc.
Total Liabilities	calc.	calc.

Net Assets

Total Assets	calc.	calc.
Total Liabilities	calc.	calc.
Total Net Assets	calc.	calc.
Total Liabilities and Net Assets	calc.	calc.
Lines of credit limit	\$	

Funder report narrative - Balance Sheet

text box

* This space can be used to add context, explanation, or narrative about your balance sheet. This text will appear on your reports to Funders. This narrative is optional.

Workforce & Workspace

This section is required. You must report your staffing and workspace data, but lines that are not applicable to your organization can be left blank. Any line items that are specifically required are noted below.

Workforce

	Count	Turnover
Full-time Permanent	#	#
Full-time Temporary	#	#
Part-time Permanent	#	#
Part-Time Temporary	#	#
Volunteers	#	
Independent Contractors	#	
Interns & Apprentices	#	
Board members	#	
TOTAL POSITIONS	calc.	calc.
Visual/Performing Artists	#	

What's different in this section:

- We've removed the hours worked and Full Time Equivalent fields.
- We've added a new turnover column for staffing data. This column is meant to capture the number of people who left their positions with your organization during each fiscal year.

COVID-19 Impact

Due to COVID-19 crisis restrictions on in-person gatherings and/or stay-at-home orders mandated by government health guidelines, how was staffing affected at your organization:

Number of employees laid off:	#
Number of employees furloughed:	#
Of those furloughed or laid off employees,	#

Workspaces (up to 5)

Do you have physical workspace(s)?

Yes

No

Address	text
Status	select: own, rent, or donated
Square footage	#
Use	select: administration, program delivery,

Program Activity & Audiences

This section is required. You must report some program activity and attendance, but any lines that do not apply to your organization can be left blank.

What's different in this section: - We've changed this section from 32 customized sections for each type of program activity, to 3 standard sections.

Tickets/Admissions/Package Prices

	Low	High
Tickets/Admissions	\$	\$
Subscription Package	\$	\$
Individual Membership Package	\$	\$
Organization Membership Package	\$	\$
Subscription Ticket/Admissions	\$	\$
Individual Membership Ticket/Admissions	\$	\$
Organization Membership Ticket/Admissions	\$	\$

Members and Subscribers

	Count	Renewal Rate
Subscribers	#	%
Members - Individual(s)	#	%
Members - Organizations	#	%

Programs

In Person Programs

Digital Programs

	Distinct Offerings	# of Times Offered/ Distributed	Distinct Live/Live-streamed Offerings	# of Times Accessed Live-streamed	Distinct On-demand Offerings
Productions (self-produced)	#	#	#	#	#
Productions (presented)	#	#	#	#	#
Classes/Assemblies/Other Programs in Schools	#	#	#	#	#
Classes/Workshops (outside of schools)	#	#	#	#	#
Field Trips/school visits	#	#	#	#	#
Guided Tours	#	#	#	#	#
Lectures	#	#	#	#	#
Films Screened	#	#	#	#	#

Key to data entry:
Enter text = text

Calculated automatically = calc
Enter a percentage = %

Dollar amount = \$
Non-dollar number = #

Readings/Workshops
(Developing Works)
Festivals/Conferences
Broadcast productions
Community Programs (not
included above)
Additional Programs not
listed above

#	#	#	#	#
#	# (events at festivals)	#	# (events at festivals)	#
		#	#	#
#	#	#	#	#
<i>text box for description</i>				
#	#	#	#	#
<i>text box for description</i>				

Permanent Exhibitions
Temporary Exhibitions
Traveling Exhibitions
(Hosted)
Published Works
Private Lessons

	In Person/ Physical	Digital
Permanent Exhibitions	#	#
Temporary Exhibitions	#	#
Traveling Exhibitions (Hosted)	#	#
Published Works	#	#
Private Lessons	#	#

Fiscally Sponsored Projects
Scholarships awarded
Other Grants awarded
Residencies
Public Art Installations
Works Commissioned
Films Produced
World Premieres
National Premieres
Local/Regional Premieres
Competitions
Open Rehearsals

	Count	Monetary Value
Fiscally Sponsored Projects	#	\$
Scholarships awarded	#	\$
Other Grants awarded	#	\$
Residencies	#	
Public Art Installations	#	
Works Commissioned	#	
Films Produced	#	
World Premieres	#	
National Premieres	#	
Local/Regional Premieres	#	
Competitions	#	
Open Rehearsals	#	

Attendance/Participation

Total In-Person
Total Digital (for mission-related, digitally-
TOTAL In-Person and Digital

	Paid	Free
Total In-Person	#	#
Total Digital (for mission-related, digitally- TOTAL In-Person and Digital	#	#
	calc.	calc.

Of Total In-Person, total of
those 18 and under

#

Schools Programs Attendance Breakout (These should be included within the Attendance section above.)

	Attendance	Hours of Instruction
Programs in Schools	#	#

Social Media and Website

	Unique Followers/ Fans
Facebook	#
Twitter	#
YouTube	#
Instagram	#
Vimeo	#
TikTok	#
Snapchat	#
Other Social Media	#
Other Social Media Platform Description	text
Website Page Views	#
Website Sessions/Visits	#
Website Unique Visitors	#

Funder report narrative - Program Activity

text box	<p>* This space can be used to add context, explanation, or narrative about your Program Activity. This text will appear on your reports to Funders. This narrative is optional.</p>
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