

Streamlined Cultural Data Profile (CDP) – Organizations with Annual Expenses under \$50,000

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 organizations with annual expenses under \$50,000
- 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 with expenses less than \$50,000 annually. 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.

What's different in this section:

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

Earned Operating Revenue

Unrestricted

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 above	\$
	<i>text box for description</i>
Total Earned Operating Revenue	calc.

Digital Program Revenue

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

\$

Key to data entry:
Enter text = text

Calculated automatically = calc
Enter a percentage = %

Dollar amount = \$
Non-dollar number = #

Investment Revenue

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

Contributed Revenue

	Unrestricted	Total	Count 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?
 Fundraising event expenses (*if reported as net*)
 Contributions not listed above

- Gross
- Net

\$	
\$	calc.
<i>text box for description</i>	
calc.	calc.

TOTAL CONTRIBUTED

Digital Program Revenue

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

\$

Is your organization currently in a capital campaign?

- Yes
- No

TOTAL OPERATING REVENUE

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 want to provide a full breakout of your expenses into three functional categories (Program, Management and General, and Fundraising)? (required)

- Yes
- No

What's different in this section:

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

Personnel Expenses

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

Visual/Performing Artists

*Program, Management and General, and Fundraising columns will only be shown if the answer to "Do you want to provide a full breakout of your expenses into three functional categories?" is yes. Otherwise a single column will be shown.

Non-Personnel Expenses

	Single Column*	Program	Management and General	Fundraising
Occupancy	\$	\$	\$	\$
Interest Expense	\$	\$	\$	\$
Depreciation	\$	\$	\$	\$
Non-Personnel expenses not listed above	\$	\$	\$	\$
<i>(text box for description of expenses not listed above)</i>				

Key to data entry:
text = Enter text

calc = Calculated automatically
% = Enter a percentage

\$ = Dollar amount
= Non-dollar number

TOTAL NON-PERSONNEL

calc.	calc.	calc.	calc.
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Program Management and General Fundraising

Estimated Total Functional Expenses as Percentages

%	%	%
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**This question is only shown if you opt to fill out the single column expense section, by answering no to "Do you want to provide a full breakout of your expenses into three functional categories?"*

Total Operating Expenses

calc.
calc.
calc.

Total Personnel

Total Non-Personnel

TOTAL OPERATING EXPENSES

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?

\$

TOTAL EXPENSES

TOTAL (OPERATING and NON-OPERATING) Expenses

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.*

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,

Key to data entry:
Enter text = text

Calculated automatically = calc
Enter a percentage = %

Dollar amount = \$
Non-dollar number = #

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
#	#
#	#
#	#
#	#
#	#

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
#	\$
#	\$
#	\$
#	
#	
#	
#	
#	
#	
#	
#	
#	

Attendance/Participation

Total In-Person

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

Paid	Free
#	#
#	#
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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