



SMU | DataArts

NATIONAL CENTER FOR ARTS RESEARCH

## Streamlined Cultural Data Profile (CDP) – for Un-Audited Organizations

The Cultural Data Profile (CDP) is an online survey that collects financial and programmatic data from nonprofit arts, culture, and humanities organizations – large and small, and across all disciplines - to be used for grant reporting and internal analysis.

This document is a resource to help you prepare to fill out the CDP. It includes:

- All of the line items and questions you will find in the CDP
- An appendix with definitions and instructions for each line item
- Information about required fields and the built in error check (also in the appendix)

There are three different versions of the CDP for audited organizations, un-audited organizations, and organizations with annual expenses under \$50,000. This document is specifically for un-audited organizations..

You can login to complete the CDP at [da.culturaldata.org](https://da.culturaldata.org). There you will also find additional instructions and resources to help you get started. Our Support Center is also available to assist you with the CDP at **877-707-DATA (877-707-3282)** or [help@culturaldata.org](mailto:help@culturaldata.org).

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## Key to data entry fields:

Dollar amount = \$  
Non-dollar number = #  
Enter text = text  
Calculated automatically = calc.  
Enter a percentage = %

# Organization Set-up

## Before You Start

You will provide some basic information about your organization to set up your account. This process will only take a few minutes, and you will need to finish before you can save your work.

### Do you have this information available?

Organization address, phone, and email

Mission statement

Primary contact person

Fiscal year end date

Federal ID

Year founded and incorporated

## Basic Information

(Information will not be saved until all required questions are complete.)

Organization Type

### Organization Details

Organization Name

This is my organization's legal name

Friendly Name

Federal ID (optional)

DUNS Number (optional)

## Address and Contact Information

Enter your main mailing address. You will be able to enter additional locations for your organization when completing surveys.

|                           |                                     |                                    |
|---------------------------|-------------------------------------|------------------------------------|
| Quick Lookup              | <input type="text" value="text"/>   |                                    |
| Mailing Address           | <input type="text" value="text"/>   |                                    |
| Address Line 2 (optional) | <input type="text" value="text"/>   |                                    |
| City/State                | <input type="text" value="text"/>   | <input type="text" value="state"/> |
| County/Zip                | <input type="text" value="county"/> | <input type="text" value="#"/>     |
| Country                   | <input type="text" value="text"/>   |                                    |
| Phone                     | <input type="text" value="( ) -"/>  |                                    |
| Website (optional)        | <input type="text" value="text"/>   |                                    |

## Legislative Districts

These are the legislative districts for your organization's address. You may make changes or continue.

|                                  |                                |
|----------------------------------|--------------------------------|
| City Council District (optional) | <input type="text" value="#"/> |
| State House District (optional)  | <input type="text" value="#"/> |
| State Senate District (optional) | <input type="text" value="#"/> |

Federal Congressional District  
(optional)

|   |
|---|
| # |
|---|

Full Name

|      |
|------|
| text |
|------|

Title

|      |
|------|
| text |
|------|

Email

|      |
|------|
| text |
|------|

Phone

|      |
|------|
| text |
|------|

### Additional Information

Fiscal Year End Date

|         |
|---------|
| -Month- |
|---------|

Year Founded (optional)

|       |
|-------|
| -Day- |
|-------|

Year Incorporated (optional)

|   |
|---|
| # |
|---|

|   |
|---|
| # |
|---|

### Summary

Your choices will be displayed here and can be edited by clicking the orange pencil next to the bold header. Once information is updated, click the save where the pencil used to be.

# Customize your Survey

In this section, you will answer a few questions to help us tailor your survey to your organization's programming, size, and complexity. During this brief setup, you cannot save your work. After setup, you can stop and save while you work on your survey.

## Select a Year

Which Fiscal Year do you want to work on?

Fiscal Year Length

- 12 months
- Other

Fiscal Year End Date

## Organization Type

What is your organization type? (select one)

- 501(c)3 nonprofit organization
- Other nonprofit organization
- Unincorporated or fiscally sponsored organization
- Program/department within a parent organization
- Government agency, department, program, or facility
- For profit corporation

What is your organization's Federal Employer Identification number (EIN)?

Organization Federal EIN  
(required for 501c3 orgs)

What year did your organization receive IRS tax exemption status?

Year Tax Exemption Received  
(optional)

## Discipline

What is your organization's NTEE code? (required)

NTEE Classification

Full list of NTEE codes as provided by NCCS here:

<http://nccs.urban.org/classification/national-taxonomy-exempt-entities>

Which NISP code best describes your organization?

1 Discipline (required)

Dance

Music

Opera, musical theatre

Theatre

Visual arts

Media arts

Literature

Interdisciplinary

Folklife/traditional arts

Humanities storytelling

Design arts  
Crafts

Multidisciplinary  
Non-arts/non-humanities

2 Specialty (optional)

dropdown list based on discipline selected above

3 Institution Type (required)

dropdown list

01 Individual Artist  
02 Individual Non-Artist  
03 Performing Group  
04 Performing Group -  
College/University  
05 Performing Group -  
Community  
06 Performing Group - Youth  
08 Art Museum  
09 Other Museum  
10 Gallery/Exhibit Space  
11 Cinema  
12 Independent Press  
13 Literary Magazine  
14 Fair/Festival  
15 Arts Center  
16 Arts Council/Agency  
17 Arts Service Organization  
18 Union/Professional  
Association  
19 School District  
  
20 Parent-Teacher Organization  
  
21 Elementary School  
22 Middle School  
23 Secondary School  
24 Vocational/Technical School  
25 Other School  
26 College/University

27 Library  
28 Historical Society  
29 Humanities Council  
  
30 Foundation  
  
31 Corporation  
32 Community Service Org  
34 Health Care Facility  
35 Religious Organization  
36 Seniors' Center  
37 Parks & Recreation  
38 Government - Executive  
39 Government - Judicial  
40 Government - Legislative (House)  
41 Government - Legislative (Senate)  
42 Media - Periodical  
43 Media - Daily Newspaper  
44 Media -Weekly Newspaper  
45 Media - Radio  
  
46 Media- TV  
  
47 Cultural Series Organization  
48 Schools of the Arts  
49 Arts Camp/Institute  
50 Social Service Organization  
51 Child Care Provider  
99 None of the Above

**Total Expenses**

Are your total expenses less than \$50,000?

- Yes (*skip to Summary, Save & Finish*)  
 No (*continue with the wizard*)

**Financial Information Part 1**

Do you have a completed audit or review for [Fiscal Year]?

- Yes
- No

Did you have restricted contributions, grants, in-kind, or investment revenue?

- Yes
- No

Did you have restricted earned revenue (this is rare)?

- Yes
- No

### **Financial Information Part 2**

Did your organization have non-operating revenues in [Fiscal Year]?

- Yes
- No

Did your organization have non-operating expenses in [Fiscal Year]?

- Yes
- No

### **Summary**

Your choices will be displayed here and can be edited by clicking the orange pencil next to the bold header. Once information is updated, click the save where the pencil used to be.

**Save and Finish**

# 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.

[Definitions, required fields, and error checks are available in the appendix.](#)

## 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 Included Above | \$                                | \$         |
| Earned Program Revenue not Included Above     | \$                                | \$         |
|   | <i>(text box for description)</i> |            |
| Earned non-program revenue not included above | \$                                | \$         |
|   | <i>(text box for description)</i> |            |
| Total   | calc.                             | calc.      |

## Digital Program Revenue

Of your organization's total earned operating revenue, how much was from programming delivered digitally? This is a breakout field. Amounts included here should also be entered in the earned revenue section above. This field is optional, and you can provide an estimate.

|    |
|----|
| \$ |
|----|

## Investment Revenue

Use this section to record all of the activity on your investment portfolio. Include all interest, realized and unrealized gains and losses.

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



## Non-Operating Revenue

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

|                               | Unrestricted               | Restricted |
|-------------------------------|----------------------------|------------|
| In-Kind Non-Operating Revenue | \$                         | \$         |
| Other Non-Operating Revenue   | \$                         | \$         |
|                               | (text box for description) |            |
| Total                         | calc.                      | calc.      |

## Contributed Revenue

\* The Restricted column will be hidden if the answer to "Do you have restricted contributed revenue?" in Survey Settings is no.

|                            | 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 above for special fundraising events gross or net of expenses?

Gross  
 Net

|   |                            |       |       |
|---|----------------------------|-------|-------|
| Fundraising Event Expenses (if reported as net) | \$                         |       |       |
| Contributions not Included Above                | \$                         | \$    | calc. |
|   | (text box for description) |       |       |
| Net Assets Released from Restriction            | \$                         | \$    | calc. |
| Total Contributed                               | calc.                      | calc. | calc. |

## Digital Contributed Revenue

Of your organization's total contributed revenue, how much was associated with programming delivered digitally? This is a breakout field. Amounts included here should also be entered in the earned revenue section above. This field is optional, and you can provide an estimate.

\$

## Capital Campaign

Is your organization currently in a capital campaign?

- Yes
- No

## Revenue Summary

|                                | Unrestricted | Restricted |
|--------------------------------|--------------|------------|
| Earned Revenue                 | calc.        | calc.      |
| Investment Revenue             | calc.        | calc.      |
| Contributed Revenue            | calc.        | calc.      |
| <b>Total Operating Revenue</b> | calc.        | calc.      |
| Total Non-Operating Revenue    | calc.        | calc.      |
| <b>Total Revenue</b>           | calc.        | calc.      |

### Funder report narrative - Revenue

This space can be used to add context, explanation, or narrative about your revenue. This text will appear on your reports to funders. Limit 500 characters. This narrative is optional.

text box

# Expenses

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

[Definitions, required fields, and error checks are available in the appendix.](#)

## Audit Totals

These totals should be taken directly from your audit or review. We will use these numbers to verify that your expenses are entered accurately by comparing them to the totals that calculate at the bottom of the expenses section.

|                                 |       |
|---------------------------------|-------|
| Program Expenses                | \$    |
| Management and General Expenses | \$    |
| Fundraising Expenses            | \$    |
| Total Operating Expenses        | calc. |
| Non-operating Expenses          | \$    |
| Total Expenses                  | calc. |
| Total Change in Net Assets      | calc. |

## Expenses

### Personnel Expenses

|   | Program | Management and General | Fundraising |
|---|---------|------------------------|-------------|
| W2 Employee Salaries, Benefits, Payroll Taxes | \$      | \$                     | \$          |
| Independent Contractors                       | \$      | \$                     | \$          |
| Professional Fees                             | \$      | \$                     | \$          |
| Total   | calc.   | calc.                  | calc.       |

### Visual/Performing Artists

Of your organization's total personnel expenses above, what portion was paid to artists and performers? This is a breakout or further classification of the expenses entered above. This entry is not included in your total expenses at the bottom of the section. This is required, but you can enter a zero.

|    |
|----|
| \$ |
|----|

### Non-Personnel Expenses

|           | Program | Management and General | Fundraising |
|-----------|---------|------------------------|-------------|
| Occupancy | \$      | \$                     | \$          |

|   |  |       |       |
|---|--|-------|-------|
| Interest Expense                          | \$   | \$    | \$    |
| Depreciation                              | \$   | \$    | \$    |
| Non-Personnel expenses not included above | \$   | \$    | \$    |
|   | <i>(text box for description of expenses not listed above)</i> |       |       |
| Total                                     | calc.  | calc. | calc. |

**Total Operating Expenses**

|                                 | Program | Management and General | Fundraising |
|---------------------------------|---------|------------------------|-------------|
| Total Personnel                 | calc.   | calc.                  | calc.       |
| Total Non-Personnel             | calc.   | calc.                  | calc.       |
| <b>TOTAL OPERATING EXPENSES</b> | calc.   | calc.                  | calc.       |

**Marketing Expenses**

Of your organization's total operating expenses, how much was spent on marketing personnel and non-personnel expenses? (Required) This is a breakout or further classification of the expenses entered above. This entry is not included in your total expenses at the bottom of the section. This is required.

|               |    |
|---------------|----|
| Personnel     | \$ |
| Non-Personnel | \$ |

**Digital Program Expenses**

Of your organization's total operating expenses, how much was spent on programming delivered digitally? This is a breakout or further classification of the expenses entered above. This entry is not included in your total expenses at the bottom of the section. This question is optional and can be estimated.

|    |
|----|
| \$ |
|----|

**Non-operating Expenses**

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

|               |       |
|---------------|-------|
| Personnel     | \$    |
| Non-personnel | \$    |
| Total         | calc. |

**Total Expenses**

|  |       |
|--|-------|
| Total Operating Expenses                   | calc. |
| Total Non-Operating Expenses               | calc. |
| Total Operating and Non-Operating Expenses | calc. |

## Change in Net Assets and Narrative

### 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

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.

text box

# Balance Sheet

This section is required. You must fill out the balance sheet, but lines that are not applicable to your organization can be left blank. Any specific lines or questions that must be answered are noted.

[Definitions, required fields, and error checks are available in the appendix.](#)

## Balance Sheet

### Assets

|  |                            |
|--|----------------------------|
| Cash and Cash Equivalents                      | \$                         |
| Receivables                                    | \$                         |
| Investments - Current                          | \$                         |
| Current Assets not Included Above              | \$                         |
|  | (text box for description) |
| Total Current Assets                           | calc.                      |
| Investments - Non-Current                      | \$                         |
| Fixed Assets (Net of Accumulated Depreciation) | \$                         |
| Non-Current Assets not Included Above          | \$                         |
|  | (text box for description) |
| Total Long-term/Non-Current Assets             | calc.                      |
| Total Assets                                   | calc.                      |

### Fixed Asset Details

This is required if you have entered fixed assets above. This is a breakout or further classification of the fixed assets entered above. This entry is not included in your total net assets at the bottom of the section.

|                               |    |
|-------------------------------|----|
| Gross Fixed Assets            | \$ |
| Less Accumulated Depreciation | \$ |

### Liabilities

|  |                            |
|--|----------------------------|
| Accounts Payable and Accrued Expenses  | \$                         |
| Deferred Revenue                       | \$                         |
| Loans - Current                        | \$                         |
| Current Liabilities not Included Above | \$                         |
|  | (text box for description) |
| Total Current Liabilities              | calc.                      |
| Long-Term/Non-Current Loans            | \$                         |

Long-Term/Non-Current Liabilities  
not Included Above

\$

(text box for description)

Total Long Term/Non-Current  
Liabilities

calc.

Total Liabilities

calc.

### Net Assets

Total Assets

calc.

Total Liabilities

calc.

Total Net Assets

calc.

Total Liabilities and Net Assets

calc.

Lines of credit limit

\$

### Funder report narrative - Balance Sheet

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.

text box

# Workforce & Workspace

This section is required. You must fill out the balance sheet, but lines that are not applicable to your organization can be left blank. Any specific lines or questions that must be answered are noted.

[Definitions, required fields, and error checks are available in the appendix.](#)

## Workforce

|                         | Number of Positions | Turnover |
|-------------------------|---------------------|----------|
| Full-Time Permanent     | #                   | #        |
| Full-Time Temporary     | #                   | #        |
| Part-Time Permanent     | #                   | #        |
| Part-Time Temporary     | #                   | #        |
| Volunteers              | #                   |          |
| Independent Contractors | #                   |          |
| Interns and Apprentices | #                   |          |
| Board Members           | #                   |          |
| Total                   | calc.               | calc.    |

## Visual/Performing Artists

This is a breakout or further classification of the personnel entered above. This is required if you have entered an amount paid to artists in the Expense section.

Of the employees and contractors entered above, how many were artists or performers?\*

|   |
|---|
| # |
|---|

## COVID-19 Impact

The COVID-19 crisis has necessitated that organizations lay off or furlough employees to remain in operation. The following questions aim to gauge this impact on your organization's workforce. Please only answer these questions if the fiscal year you are reporting on includes a span of time impacted by the COVID-19 pandemic. Answers collected from fiscal years outside of the impact of the COVID-19 pandemic will not be used for research or reporting purposes. This is optional.

**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, how many (if any) have been brought back? | # |



## Organization Leadership

Provide information about the person with the highest level of decision-making authority (not including board members). This could be your organization's Executive Director, CEO, or President. You may enter two co-leaders if your organization has a shared leadership structure.

### Organizational Leader

|                         |      |
|-------------------------|------|
| Leader First Name       | text |
| Leader Last Name        | text |
| Leader Title            | text |
| Leader Year Started     | #    |
| Leader Email Address    | text |
| Co-Leader First Name    | text |
| Co-Leader Last Name     | text |
| Co-Leader Title         | text |
| Co-Leader Year Started  | #    |
| Co-Leader Email Address | text |

## Workspaces (up to 5)

In this section you can describe the places where your organization habitually works or performs. This is an opportunity to describe locations beyond your organization's home office. One workspace is required, and you may enter up to five.

If you do not have a physical workspace, check this box.

No workspace

|                    |  |
|--------------------|--|
| Address (required) | text                                       |
| Workspace Status   | Select: Own, Rent, or Donated In-kind      |
| Square footage     | #  |
| Use                | Select: Administration, Programmatic, Both |

## Program Activity & Audiences

This section is required. You must fill out the balance sheet, but lines that are not applicable to your organization can be left blank. Any specific lines or questions that must be answered are noted.

[Definitions, required fields, and error checks are available in the appendix.](#)

### Tickets/Admissions/Package Prices

|  | Low | High |
|--|-----|------|
| Tickets/Admissions Prices                          | \$  | \$   |
| Subscription Package Price                         | \$  | \$   |
| Individual Membership Price                        | \$  | \$   |
| Organization Membership Price                      | \$  | \$   |
| Subscription Ticket Price                          | \$  | \$   |
| Ticket/Admission Prices for Individual Members     | \$  | \$   |
| Ticket/Admission Prices for Organizational Members | \$  | \$   |

### Members and Subscribers

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

### Programs

|                          |   |
|--------------------------|---|
| Residencies Awarded      | # |
| 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

|                                   |                |
|-----------------------------------|----------------|
| #                                 | \$             |
| <b>In Person/<br/>Physical</b>    | <b>Digital</b> |
| Permanent Exhibitions             | #              |
| Temporary Exhibitions             | #              |
| Traveling Exhibitions<br>(Hosted) | #              |
| Published Works                   | #              |
| Private Lessons                   | #              |

In Person/Physical Programs

Digital Programs

Festivals/Conferences

| Distinct Offerings | # of Events at Festivals | Distinct Live/Live-streamed | # of Times Accessed Live-streamed | Distinct On-Demand Offerings |
|--------------------|--------------------------|-----------------------------|-----------------------------------|------------------------------|
| #                  | #                        | #                           | #                                 | #                            |

In Person/Physical Programs

Digital Programs

Productions (self-produced)  
 Productions (presented)  
 Broadcast Productions  
 Classes/Workshops (outside of schools)  
 Classes/Assemblies/Other Programs in Schools  
 Field Trips/School Visits  
 Guided Tours  
 Lectures  
 Films Screened  
 Readings/Workshops (Developing Works)  
 Community Programs not included above  
 Additional Programs not included above

| Distinct Offerings                  | # of Times Offered | Distinct Live-Streamed | # of Times Live-Streamed | On-Demand Offerings |
|-------------------------------------|--------------------|------------------------|--------------------------|---------------------|
| #                                   | #                  | #                      | #                        | #                   |
| #                                   | #                  | #                      | #                        | #                   |
|                                     |                    | #                      | #                        | #                   |
| #                                   | #                  | #                      | #                        | #                   |
| #                                   | #                  | #                      | #                        | #                   |
| #                                   | #                  | #                      | #                        | #                   |
| #                                   | #                  | #                      | #                        | #                   |
| #                                   | #                  | #                      | #                        | #                   |
| #                                   | #                  | #                      | #                        | #                   |
| #                                   | #                  | #                      | #                        | #                   |
| <i>Describe Community Programs</i>  |                    |                        |                          |                     |
| #                                   | #                  | #                      | #                        | #                   |
| <i>Describe Additional Programs</i> |                    |                        |                          |                     |

**Attendance/Participation**

|                               | Paid | Free |
|-------------------------------|------|------|
| Total In-Person Participation | #    | #    |

Total Digital Participation (for mission-related, digitally delivered programming)  
Total

|       |       |
|-------|-------|
| #     | #     |
| calc. | calc. |

### Attendees Age 18 and Under

This is a breakout or further classification of the attendance entered above. If you do not collect participants' ages, you can estimate this figure. This is required. If you did not have any participants under 18, enter a zero.

Of your organization's total in-person participation, how many participants were 18 and under?

|   |
|---|
| # |
|---|

### Programs in Schools

This section is a breakout or further classification of the programming and participation entered above. This is optional; if you do not provide programs in schools, leave these blank.

Of your organization's total participation, how much was a result of programs that took place in schools?

| Attendance | Hours of Instruction |
|------------|----------------------|
| #          | #                    |

### Social Media and Web

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

### Funder report narrative

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.

|          |
|----------|
| text box |
|----------|

## Organization Mission

This section seeks to identify whether it is your organization's mission to create, present, or interpret works from a specific ethnic, cultural, or other demographic group (e.g., an African American museum and archive, an LGBTQ choral group, or a women's dance troupe).

If your organization creates, presents, or interprets works from a range of different cultural traditions or demographic groups, answer "no" to this question.

If you select yes, you will see a list of demographic groups to select from.

Is your organization's mission rooted in an explicitly identified ethnic, cultural, or other demographic voice?

- Yes
- No

## Demographic Groups

This section appears because you selected "yes" for the previous question. If your organization's mission is rooted in a specific demographic voice, please select it below. You can select all that apply.

If your organization's mission is rooted in a specific ethnic, racial, or cultural voice, please select it here. You can select all that apply.

### Ethnic/Racial/Cultural Voice

- White (non-Hispanic)
- Hispanic/Latino(a)
- Black
- Asian
- Middle-Eastern
- Indigenous
- Additional Group (please state)

### Age Group

- Under 18
- 18-64
- 65+
- Additional Age Grouping (please state)

### Gender Identity

- Female
- Male
- Genderqueer/gender non-conforming
- Transgender
- Additional Identity (please state)

### Disability

Please indicate if your organization mission is rooted in serving individuals with a disability?

- Yes
- No

### Sexual Identity

- Heterosexual or Straight
- Gay or Lesbian
- Bisexual
- Asexual
- Additional Orientation (please state)

### Additional Characteristics

If your organization's mission is rooted in serving other populations, please state the additional characteristics of those as well

- Additional Characteristic (please state)

## Organization Audience

This question seeks to identify specific ethnic, cultural, or other demographic groups that your organization serves as audience members or participants. You should only answer “yes” and select a demographic group if your organization’s mission is focused on serving them, or if individuals from that group make up a significant portion of your overall audience (roughly 25% or more). If you do not have audience demographics data available, these answers may be based on estimates or perceptions of your audience or participants.

Does your organization primarily serve (or seek to serve) a specific audience?

- Yes
- No

## Demographic Groups

This section appears because you selected “yes” for the previous question. If your organization primarily serves a demographic group, please select it below. You can select all that apply.

### Ethnic/Racial/Cultural Voice

- White (non-Hispanic)
- Hispanic/Latino(a)
- Black
- Asian
- Middle-Eastern
- Indigenous
- Additional Group (please state)

### Age Group

- Under 18
- 18-64
- 65+
- Additional Age Grouping (please state)

### Gender Identity

- Female
- Male
- Genderqueer/gender non-conforming
- Transgender
- Additional Identity (please state)

### Disability

Does your organization primarily serve individuals with a disability?

- Yes
- No

### Sexual Identity

- Heterosexual or Straight
- Gay or Lesbian
- Bisexual
- Asexual
- Additional Orientation (please state)

### Additional Characteristics

If your organization primarily serves other populations, please state the additional characteristics of constituencies served.

- Additional Characteristic (please state)

## Local Community

Choose one community type, based on where the majority of your participants live. If you do not have data available, this can be based on estimates or your perceptions of your audience.

Which term best describes the local community you serve?

- Urban
- Suburban
- Rural

## COVID-19 Impact

This question is optional. Please only answer this question if the fiscal year you are reporting on includes a span of time impacted by the COVID-19 pandemic. Answers collected from fiscal years outside of the impact of the COVID-19 pandemic will be eliminated during research analysis.

During the period of the COVID-19 crisis when in-person gatherings were impossible due to stay-at-home orders and/or government health

- Delivery programming normally
- Modify program delivery
- Cease program delivery
- Not Applicable

# Appendix - Revenue

## Audit Totals

These totals should be taken directly from your audit or review. We will use these numbers to verify that your revenue is entered accurately, by comparing them to the totals that calculate at the bottom of the revenue section.

|                             |   |
|-----------------------------|---|
| Total Operating Revenue     | <p>The amount that appears on the “Total Revenue” or “Total Operating Revenue” line of your audit or review, broken down by restriction. Some audits show the restricted portion of Total Revenue below expenses in a section that may be called “Changes in Net Assets With Donor Restrictions.”</p> <p><b>Entries in this line and the line below must match the Unrestricted and Restricted Operating Revenue values that are calculated at the bottom of the Revenue section. (Required)</b></p>  |
| Total Non-Operating Revenue | <p>These items may be listed “below the line” on your audit’s income statement, or located below the “Total Revenue” or “Change in Net Assets” line. If your audit or review does not distinguish between operating and non-operating revenue, but you wish to break them out in your Data Profile, break them out here as well. Otherwise, leave this line blank.</p> <p><b>Entries in this line and the line below must match the Unrestricted and Restricted Operating Revenue values that are calculated at the bottom of the Revenue section. (Required)</b></p> |

## Definitions used throughout the Revenue section

|              |   |
|--------------|---|
| Unrestricted | Funds that can be used for general operations or designated by your organization for any other purpose.             |
| Restricted   | Funds that donors have specified for use for a specific purpose or at a specific time, or to be held in perpetuity. |

## Earned Operating Revenue

|                               |   |
|-------------------------------|---|
| Subscription Revenue          | Revenue from the sale of tickets to a performance season or series, or media subscriptions. Includes flexible, partial, or create-your-own subscriptions. Includes subscriptions or advance payments for access to a series of broadcast or digital media, such as telecasts, webcasts, podcasts, and similar programs. |
| Membership Fees - Individuals | Fees paid at regular intervals by individuals or households for their participation or affiliation with your organization. Members typically receive benefits, such as free admission, discounts, and invitations to special events.  |



|   |  |
|---|--|
| <b>Membership Fees - Organizations</b>      | Fees paid at regular intervals by organizations or corporations for their participation or affiliation with your organization. Members typically receive benefits, such as free or discounted registration for conferences or events for their staff, or discounts on services.  |
| <b>Ticket sales/Admissions</b>              | Revenue from one-time ticket sales or one-time admission fees for visitation. This includes group sales.   |
| <b>Education Revenue</b>                    | Revenue from fees or tuition for one-time workshops, multi-session classes, lectures, lecture series, and/or semester-long courses offered by your organization. If your organization was contracted by another organization for educational programming, enter that revenue in "Contracted Services and Touring Fees."            |
| <b>Publication sales</b>                    | Revenue from the sale of materials such as articles, books, and reports that were authored or produced by your organization. This includes both digital and physical publications. Revenue from materials not produced by your organization should be entered in the line item "Attendee-Generated Revenue Not Included Above."    |
| <b>Gallery Sales</b>                        | Revenue from the sale of visual art. This includes the commission portion of consignment sales.  |
| <b>Contracted services and touring fees</b> | Revenue or commissions from services performed under contract including public or private performances, exhibitions, or other programming. This includes revenue from performance or exhibition tours. Fees paid by individuals for facility tours should be entered in the line item "Earned Program Revenue Not Included Above." |
| <b>Royalty/reproduction revenue</b>         | Revenue from the use of your organization's intellectual property, such as printed materials, photographic materials, artistic works, broadcasts, webcasts, recordings, and choreography.  |
| <b>Rental Revenue</b>                       | Revenue from leasing space, equipment, costumes, instruments, etc.   |
| <b>Sponsorship Revenue</b>                  | Revenue from corporations or other organizations for association with a project or program in exchange for recognition, such as the display of logos, brand names, or specific mention that the corporation has provided funding.  |

|   |  |
|---|--|
| Attendee-generated revenue not included above | Revenue not entered above generated from additional spending by individuals attending programs at your facility, such as gift shop sales, concession sales, etc.   |
| Earned program revenue not included above     | Revenue not entered above generated from activities directly related to your mission, but not generated by individuals attending your programming.   |
| Describe Earned Program Revenue*              | Enter a description of your other earned program revenue. This is required if anything is entered in the line above. Limit 75 characters.<br><br><b>If you entered an amount in "Earned Program Revenue not Included Above," this field is required.</b>         |
| Earned non-program revenue not included above | Revenue not entered above from activities that do not contribute directly to your mission or exempt purpose.   |
| Describe Earned Non-Program Revenue*          | Enter a description of your other Earned Non-Program Revenue. This is required if anything is entered in the line above. Limit 75 characters.<br><br><b>If you entered an amount in "Earned Non-Program Revenue not Included Above," this field is required.</b> |

### Digital Program Revenue

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

Definitions text

### Investment Revenue

|                                    |  |
|------------------------------------|--|
| Investment Revenue - Operating     | Bank account interest, and any interest and realized or unrealized gains and losses on stocks, bonds, mutual funds, and other investments that are intended for immediate use.     |
| Investment Revenue - Non-Operating | Bank account interest, and any interest and realized or unrealized gains and losses on stocks, bonds, mutual funds, and other investments that are not intended for immediate use. |

## Non-Operating Revenue

|                                       |   |
|---------------------------------------|---|
| In-Kind Non-Operating Revenue         | Donated assets, such as buildings or equipment, or services associated with capital projects.   |
| Other Non-Operating Revenue           | All other one-time revenue additions such as capital campaign contributions, bequests, and gains from the sale of property or other extraordinary items.  |
| Describe Other Non-Operating Revenue* | Enter a description of your Other Non-Operating Revenue. This is required if anything is entered in the line above. Limit 75 characters.<br><br><b>If you entered an amount in "Other Non-Operating Revenue," this field is required.</b> |

## Contributed Revenue

### Definitions used throughout the Contributed Revenue section

|                    |  |
|--------------------|--|
| Count Contributors | Please provide the number of unique contributors for each type of contribution listed below. If a contributor gave multiple donations, only count them one time here. This is required in every line where contributions have been entered.<br><br><b>Count of contributors is required for any line item below where you enter an amount contributed.</b> |
|--------------------|--|

### Definitions for specific line items

|                  |   |
|------------------|---|
| Trustee/Board    | Contributions from current members of your Board of Directors/Trustees. Contributions from corporations or foundations affiliated with board members should not be entered here unless they are from a board member's family foundation.                            |
| Other Individual | Contributions from individuals who are not on your board. Do not include revenue from your membership program if it has been entered in the earned revenue section. This does not include special event ticket revenue, or donations made at a special event.       |
| Corporate        | Grants, funds, and matching gifts contributed to your organization by corporations, institutions, and other nonprofit organizations. Include revenue contributed by corporate foundations. Enter revenue from corporate sponsorships in the earned revenue section. |
| Foundation       | Revenue contributed to your organization by a charitable foundation. Contributions from corporate foundations and board member family foundations should be entered in the lines above.   |

|  |  |
|--|--|
| City Government  | Contributions, grants, and contracts from city government agencies and departments.  |
| County Government  | Contributions, grants, and contracts from county government agencies and departments.  |
| State Government   | Contributions, grants, and contracts from state government agencies and departments.   |
| Federal Government   | Contributions, grants, and contracts from federal government agencies and departments.   |
| Tribal   | Contributions, grants, and contracts from tribal governments and organizations.  |
| In-Kind Contributions  | The monetary value of non-cash contributions received by your organization in the form of goods, professional services, use of space, etc. Only include contributions that can be assigned a monetary value through an invoice, established rate for services, receipt, etc.                               |
| Parent Organization Support  | Contributions from a parent organization, whether received as a cash transfer or a budget line item. If your parent organization pays for salaries, space, or any other overhead expenses, include the value of those expenses here.   |
| Special Fundraising Events   | Revenue from events such as dinners, galas, auctions, and walk-a-thons, organized to raise funds to support the organization's activities. Enter this number as it appears on your financial statements. You will be asked to specify if it is gross or net of expenses below.                             |
| Is the amount reported above for special fundraising events gross or net of expenses?* | Gross refers to the total amount of revenue from the event. Net refers to the revenue from the event less any associated event expenses. Either reporting method is allowable according to GAAP accounting rules.<br><b>This is required if anything has been entered in "Special Fundraising Events."</b> |
| Fundraising Event Expenses*  | If your Special Fundraising Event Revenue is reported net of expenses, enter the expense amount subtracted from the event revenue.<br><b>This is required if you have reported Special Fundraising Events Revenue Net.</b>   |

|                                      |  |
|--------------------------------------|--|
| Contributions Not Included Above     | Contributions not entered elsewhere in this section.   |
| Describe Other Contributions*        | Enter a description of your other Contributions. This is required if anything is entered in the line above.<br><br><b>If you entered an amount in "Contributions Not Included Above," this field is required.</b>  |
| Net Assets Released From Restriction | The transfer of funds originally restricted by donor(s) that become available for use once program or timing stipulations have been satisfied. Funds are usually released from Restricted to Unrestricted, so you will usually enter the amount as a positive value in the Unrestricted field, and as a negative value in the Restricted field. <b>This line must net to zero.</b> |

### Digital Contributed Revenue

Of your organization's total contributed revenue, how much was associated with programming delivered digitally? This is a breakout field. Amounts included here should also be entered in the earned revenue section above. This field is optional, and you can provide an estimate.

|   |   |
|---|---|
| Of your organization's total contributed revenue, how much was associated with programming delivered digitally? | Contributions directly associated with programs that happen through computer technology, digitally, or virtually. This includes contributions made during a virtual event or grant funds restricted for the purpose of providing digital programming. |
|---|---|

### Capital Campaign

|   |   |
|---|---|
| Is your organization currently in a capital campaign? | A long-term fundraising campaign or plan for strategic projects or initiatives that require a large amount of capital. Capital campaigns are typically for acquiring funds to renovate or build a building, grow an endowment, or pursue a large-scale initiative.<br><br><b>This question is required.</b> |
|---|---|

# Appendix - Expenses

## Audit Totals

These totals should be taken directly from your audit or review. We will use these numbers to verify that your expenses are entered accurately by comparing them to the totals that calculate at the bottom of the expenses section.

|                                 |   |
|---------------------------------|---|
| Program Expenses                | Total Program Expenses as reported in the Income Statement, Statement of Activities, or notes portion of your organization's audit or review.<br><br><b>This line is required, and must match the Program Expenses value that is calculated at the bottom of the Expense section.</b>   |
| Management and General Expenses | Total Management and General Expenses as reported in the Statement of Activities, Income Statement, or notes portion of your organization's audit or review.<br><br><b>This line is required, and must match the Management and General Expenses value that is calculated at the bottom of the Expense section.</b>   |
| Fundraising Expenses            | Total Fundraising Expenses as reported in the Statement of Activities, Income Statement, or notes portion of your organization's audit or review.<br><br><b>This line is required, and must match the Fundraising Expenses value that is calculated at the bottom of the Expense section.</b>   |
| Non-Operating Expenses          | Expense items listed in your audit or review below the Total Expenses line. Non-operating expenses are incurred outside the normal business operations of the organization, or are associated with unusual or one-time events.<br><br><b>This line must match the Non-Operating Expenses value that is calculated at the bottom of the Expense section.</b> |

## Expenses

### Definitions used throughout the Expenses section

|                        |   |
|------------------------|---|
| Program                | Costs associated with activities that advance your organization's mission and that result in the delivery of programs, products, or services. |
| Management and General | Costs associated with the overall operations and management of your organization.   |
| Fundraising            | Costs associated with soliciting grants and contributions of money, goods, and services for your organization.                                |

## Personnel Expenses

|   |  |
|---|--|
| W2 Employee Salaries, Benefits, Payroll Taxes | All salaries and wages paid to employees as well as benefits, fringe benefits, and payroll taxes paid on behalf of employees to whom your organization provides an IRS Form W2.<br><br><b>If you enter full-time or part-time staff in the Workforce section, this line is required.</b> |
| Independent Contractors                       | Payments to individuals who provide services for your organization under an agreement and outside of an employer-employee relationship. Independent contractors do not have taxes withheld from their wages, and your organization may provide them with an IRS Form 1099.               |
| Professional Fees                             | Fees paid to companies or organizations for services rendered.   |

## Visual/Performing Artists

This is a breakout or further classification of the expenses entered above. This entry is not included in your total expenses at the bottom of the section. This is required, but you can enter a zero.

|   |  |
|---|--|
| Of your organization's total personnel expenses above, what portion was paid to artists and performers? | The compensation provided to visual or performing artists to create or perform artistic works as part of your programmatic activities. Includes employees and independent contractors.<br><br><b>This field is required. If you do not have any visual or performing artists on staff, enter zero.</b> |
|---|--|

## Non-Personnel Expenses

|   |  |
|---|--|
| Occupancy                                 | Cost related to occupying space, such as rent, property taxes, repairs, security, and utilities.   |
| Interest Expense                          | Interest paid on lines of credit, credit cards, and any other loans your organization holds.   |
| Depreciation                              | A non-cash accounting estimate representing the decline in the value of physical assets owned by your organization.  |
| Non-Personnel Expenses Not Included Above | All other expenses not entered in the lines above. This could include office expenses, travel expenses, production and event expenses, etc.  |
| Please Describe other Non-Personnel       | Please describe or list the major non-personnel items included above.<br><br><b>If you entered an amount in "Non-Personnel Expenses not Included Above," this field is required.</b> |

## Functional Expense Estimation

(Only for organizations with total expenses under \$50,000)

The sum of these percentages must equal 100%. Enter the estimates as whole numbers, e.g., 60%, 20%, 20%.

These percentages will be used to calculate your total expenses for each of these three categories for reporting. This is required.

Estimate what percentage of your total expenses were associated with Programs, Management and General, and Fundraising.

Percentages entered here must equal 100%

## Marketing Expenses

Of your organization's total operating expenses, how much was spent on marketing personnel and non-personnel expenses? (Required) This is a breakout or further classification of the expenses entered above. This entry is not included in your total expenses at the bottom of the section.

These fields are required. If you have no marketing expenditures, enter zero.

|                                    |  |
|------------------------------------|--|
| Marketing Expenses - Personnel     | Marketing expenses related to personnel, such as salaries or wages for marketing employees, marketing agency fees, independent contractor fees related to marketing, etc. For employees who spend part of their time on marketing, include a percentage of their salary equal to the portion of time they spend on marketing activities. |
| Marketing Expenses - Non-Personnel | Marketing expenses not related to personnel, such as the cost of advertising space, marketing-related printing and postage costs, promotional materials, etc.  |

## Digital Program Expenses

This is a breakout or further classification of the expenses entered above. This entry is not included in your total expenses at the bottom of the section. This question is optional and can be estimated.



|   |   |
|---|---|
| Of your organization's total operating expenses, how much was spent on programming delivered digitally? | All costs for programming delivered through computer technology, digitally, or virtually. This includes technology costs, artist wages, materials costs, etc. |
|---|---|

**Non-operating Expenses**

|  |   |
|--|---|
| Non-Operating Expenses - Personnel     | Personnel expenses incurred outside of the normal business operations of your organization, including personnel costs related to capital campaigns and other capital projects.                                |
| Non-Operating Expenses - Non-Personnel | Expenses incurred outside of the normal business operations of your organization, such as unusual or one-time costs associated with capital campaigns, property sales, business reorganizations, or lawsuits. |

# Appendix - Balance Sheet

## Audit Totals

These totals should be taken directly from your audit or review. We will use these numbers to verify that your balance sheet is entered accurately, by comparing them to the totals that calculate at the bottom of the Balance Sheet.

|                                  |  |
|----------------------------------|--|
| Total Assets                     | The amount that appears on the "Total Assets" line of your Balance Sheet or Statement of Financial Position.   |
| Total Liabilities and Net Assets | The amount that appears on the "Liabilities and Net Assets" line of your Balance Sheet or Statement of Financial Position. It may also be referred to as "Total Liabilities and Equity" or "Total Liabilities and Fund Balances." <b>This amount must match the Total Assets entered in the line above.</b>  |
| Unrestricted Net Assets          | The amount that appears on the "Net Assets Without Donor Restrictions" line of your Balance Sheet or Statement of Financial Position. It may also be referred to as "Unrestricted Net Assets," "Total Unrestricted Equity," or "Unrestricted Fund Balance."<br><br><b>This line is required, and must match the Unrestricted Net Assets value that is calculated at the bottom of the Balance sheet.</b>                           |
| Restricted Net Assets            | The amount that appears on the "Net Assets With Donor Restrictions" line on your Balance Sheet or Statement of Financial Position. If you are working from an audit or review from 2018 or earlier, enter the sum of your Permanently Restricted and Temporarily Restricted Net Assets.<br><br><b>This line is required, and must match the Restricted Net Assets value that is calculated at the bottom of the Balance sheet.</b> |

## Definitions used throughout the Balance Sheet section

|              |   |
|--------------|---|
| Unrestricted | Funds that can be used for general operations or designated by your organization for any other purpose.             |
| Restricted   | Funds that donors have specified for use for a specific purpose or at a specific time, or to be held in perpetuity. |

## Balance Sheet

### Assets

|  |   |
|--|---|
| Cash and Cash Equivalents                      | The value of any asset that is cash or can be converted to cash within 90 days. Includes the year-end balances of savings and checking accounts, certificates of deposit, and money market accounts and/or other accounts with a maturity of fewer than 90 days.  |
| Receivables                                    | The amount owed to your organization for the sale of goods and the provision of services, and the amount of awards and pledges owed to your organization by grantmakers, public funders, and individual donors within one year.   |
| Investments - Current                          | Investments in financial securities, such as stocks and bonds or other temporary investments, that can be (or are intended to be) converted to cash within one year.  |
| Current Assets Not Included Above              | Assets not entered above that can be converted to cash within one year, including amounts paid by your organization for future expenses such as, rent and insurance (e.g. prepaid expenses), the value of gift shop inventory, or security deposits. Use this line for interfund balances or "Due To/Due From" entries. |
| Investments - Non-Current                      | The value of long-term financial securities, such as stocks and bonds, that are intended to remain invested for the long term or in perpetuity.   |
| Fixed Assets (Net of Accumulated Depreciation) | The purchase value of land, building(s), equipment, and leasehold improvements minus accumulated depreciation. Depreciation is a non-cash expense that reduces the purchase value of fixed assets to reflect general wear and tear.   |
| Non-Current Assets Not Included Above          | All other assets not entered above that your organization expects to hold for more than one year, such as investments in another company, intangible assets such as patents or trademarks, long-term security deposits, etc.  |

### Fixed Asset Details

This is required if you have entered fixed assets above. This is a breakout or further classification of the fixed assets entered above. This entry is not included in your total net assets at the bottom of the section.

Both lines below are required if you have entered "Fixed Assets, net" above.

|                               |   |
|-------------------------------|---|
| Gross Fixed Assets            | The purchase or original value of land, building(s), equipment, and leasehold improvements.   |
| Less Accumulated Depreciation | An accounting estimate of the decline in value of all fixed assets due to wear and tear or obsolescence. <b>This must be a negative number.</b> |

## Liabilities

|  |   |
|--|---|
| Accounts Payable and Accrued Expenses                | The amount owed to vendors or other organizations by your organization and any expenses recognized before they have been paid, such as employee bonuses and unused vacation time.   |
| Deferred Revenue                                     | Payment received for services that have not yet been earned or delivered. For example, tuition paid a year before the start of a program or subscription revenue for performances in the next year. Deferred revenue is recorded as a liability until the services are delivered.   |
| Loans – Current                                      | The amount of your organization's debt due within the next fiscal year, including lines of credit, term loans, mortgages, bonds, and capital leases.  |
| Current Liabilities Not Included Above               | Other obligations due within one year.  |
| Long-Term/Non-Current Loans                          | The amount of your organization's debt due in more than one year, including term loans.   |
| Long-Term/Non-Current Liabilities Not Included Above | Other obligations due in more than one year.  |
| Lines of credit - limit                              | <p>The amount your organization can borrow on a revolving line of credit with a bank or other financial institution. This does not include credit card limits. This is required but you can enter zero.</p> <p><b>This field is required. If you do not have a line of credit with a financial institution, enter zero.</b></p> |

# Appendix - Workforce & Workspace

## Workforce

### Definitions used throughout the Workforce section

|                     |  |
|---------------------|--|
| Number of Positions | <p>The number of positions, as opposed to the number of people. If someone leaves mid-season and is replaced, only count one position, not two different people. A position left unfilled for part of a year should still be counted.</p> <p><b>This column is required for each line item where you have entered a corresponding Personnel expense in the expenses section.</b></p> |
| Turnover            | <p>The number of employees who left their positions, retired, or were fired. If an employee or contractor was hired for a specific term or with a specific completion date and left their position as planned, do not count them here.</p> <p><b>This column is required for any line items where you have entered the Number of Positions.</b></p>                                  |

### Definitions for specific line items

|                     |   |
|---------------------|---|
| Full-Time Permanent | <p>Employees who work more than 30 hours a week for the entire year, to whom your organization provides an IRS Form W-2.</p> <p><b>If you entered salary, payroll tax, and benefits expenses in the expenses section, you must fill out one of the top four lines in this section.</b></p>  |
| Full-Time Temporary | <p>Employees who work more than 30 hours a week seasonally or for a period less than 12 months, to whom your organization provides an IRS Form W-2.</p> <p><b>If you entered salary, payroll tax, and benefits expenses in the expenses section, you must fill out at least one of the top four lines in this section.</b></p>                        |
| Part-Time Permanent | <p>Employees on your organization's payroll who work fewer than 30 hours a week on an ongoing basis, to whom your organization provides an IRS Form W-2.</p> <p><b>If you entered salary, payroll tax, and benefits expenses in the expenses section, you must fill out at least one of the top four lines in this section.</b></p>                   |
| Part-Time Temporary | <p>Employees on your organization's payroll who work fewer than 30 hours a week seasonally or for less than 12 months, to whom your organization provides an IRS Form W-2.</p> <p><b>If you entered salary, payroll tax, and benefits expenses in the expenses section, you must fill out at least one of the top four lines in this section.</b></p> |
| Volunteers          | <p>Anyone performing work for your organization who is unpaid. Do not include Board Members in this count.</p>  |

|                         |   |
|-------------------------|---|
| Independent Contractors | Individuals who provide services for your organization under an agreement and outside of an employer-employee relationship. Independent contractors are not paid through your payroll, and they may receive an IRS Form 1099. This does not include companies or firms.<br><br>If you entered independent contractor expenses in the expenses section, you must enter the number of independent contractors here. |
| Interns and Apprentices | Students, recent graduates, or others who work for your organization in exchange for job experience and, possibly, a stipend or college credit.   |
| Board Members           | Individuals who served on your organization's board of directors or advisory board during this fiscal year.   |

### Visual/Performing Artists

This is a breakout or further classification of the personnel entered above. This is required if you have entered an amount paid to artists in the Expense section.

|   |  |
|---|--|
| Of the employees and contractors entered above, how many were artists or performers?* | Visual or performing artists who are compensated by your organization to create or perform artistic works as part of your programmatic activities. Include employees and contractors; do not include volunteers. |
|---|--|

### COVID-19 Impact

The COVID-19 crisis has necessitated that organizations lay off or furlough employees to remain in operation. The following questions aim to gauge this impact on your organization's workforce. Please only answer these questions if the fiscal year you are reporting on includes a span of time impacted by the COVID-19 pandemic. Answers collected from fiscal years outside of the impact of the COVID-19 pandemic will not be used for research or reporting purposes. This is optional.

**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:  | Laid off is defined as severance of employment, requiring rehiring process to bring employee back. Include employees who receive a W-2, and independent contractors whose contracts were canceled or deferred. |
| Number of employees furloughed:  | Furloughed is defined as an individual with reduced or zero work hours but who remains an employee, allowing for reinstatement without going through a rehiring process.                                       |
| Of those furloughed or laid off employees, how many (if any) have been brought back? | The number of those furloughed or laid off who have returned to pre-crisis levels of employment. Include only employees brought back within the fiscal year you are reporting on.                              |

## Organization Leadership

Provide information about the person with the highest level of decision-making authority (not including board members). This could be your organization's Executive Director, CEO, or President. You may enter two co-leaders if your organization has a shared leadership structure.

|                         |   |
|-------------------------|---|
| Leader First Name       |   |
| Leader Last Name        |   |
| Leader Title            |   |
| Leader Year Started     | The year your organization's leader started in their current role.                                      |
| Leader Email Address    |   |
| Co-Leader First Name    | If two individuals share the highest decision-making authority at your organization, enter a co-leader. |
| Co-Leader Last Name     |   |
| Co-Leader Title         |   |
| Co-Leader Year Started  |   |
| Co-Leader Email Address |   |

## Workspaces (up to 5)

In this section you can describe the places where your organization habitually works or performs. This is an opportunity to describe locations beyond your organization's home office. One workspace is required, and you may enter up to five.

|                    |  |
|--------------------|--|
| Address (required) | Enter the address of your organization's workspace.<br><br><b>One workspace is required. If you do not have a physical workspace to enter, you can check the box at the top of the section that says "We do not have a physical workspace" and bypass the requirement.</b> |
| Workspace Status   | Select: Own, Rent, or Donated In-kind  |
| Square footage     | This may be an approximation. You may be able to find your exact square footage in your lease or property tax documentation.   |
| Use                | Indicate what this workspace is used for: administration, program delivery, or both.   |

## Appendix - Program Activity & Audiences

### Tickets/Admissions/Package Prices

#### Definitions used throughout the Pricing section

|      |   |
|------|---|
| Low  | The lowest price charged for the items below. Zero is not considered a price. Free tickets/admissions can be reflected under the Free column in the attendees and participation section, but \$0 should not be entered as a price.<br><br>Value must be greater than \$1. |
| High | The highest price charged for the items below.<br><br>This value must higher than the low price entered in the same line.   |

#### Definitions for specific line items

|  |   |
|--|---|
| Tickets/Admissions Prices                          | Prices charged for a standard ticket or admission fee. Include prices reserved for students, seniors, or other groups. If your organization charges an additional fee to view special exhibitions, do not include that cost in this price range. If you do not charge admission, leave this question blank. |
| Subscription Package Price                         | Prices charged for a subscription to your organization's programming. This can include performance subscriptions, media subscriptions, etc.   |
| Individual Membership Price                        | Prices charged to subscribers for a single ticket.  |
| Organization Membership Price                      | Prices charged for an individual or household to become a member.   |
| Subscription Ticket Price                          | Prices charged for another organization to become a member.   |
| Ticket/Admission Prices for Individual Members     | Prices charged to individual members for admission for a single ticket.   |
| Ticket/Admission Prices for Organizational Members | Prices charged to organizational members for admission or tickets to programs.  |

### Members and Subscribers

#### Definitions used throughout the Members and Subscribers section

|              |   |
|--------------|---|
| Count        | The number of people or organizations participating in your organization's membership or subscription programs.   |
| Renewal Rate | The percentage of last year's subscribers or members that renewed in the current fiscal year. Calculated as (Subscribers That Renewed This Year / Total Number of Last Year's Subscribers). |

#### Definitions for specific line items



|                          |   |
|--------------------------|---|
| Subscribers*             | <p>Individuals that subscribed to a series of programs, events, or publications. Count every individual subscribed. For example, one family subscription for a family of 4 would equal 4 subscriptions.</p> <p>If you have entered revenue from subscriptions, count of subscribers is required.</p>  |
| Members - Individual(s)* | <p>Individual persons who belong to your organization and enjoy special benefits as part of their membership. Include household memberships, and count all individuals covered by a membership. For example, one household membership for a family of 4 would equal 4 memberships.</p> <p>If you have entered revenue from individual memberships, count of individual members is required.</p> |
| Members - Organizations* | <p>Organizations who belong to your organization and enjoy special benefits as part of their membership. For example, organizations who are members of an arts service organization in exchange for discounted services and trainings.</p> <p>If you have entered revenue from organizational memberships, count of organizational members is required.</p>                                     |

## Programs

|                          |  |
|--------------------------|--|
| Residencies Awarded      | <p>Offering time and space to an artist to work on a specific project, develop artistic works, or make a substantive contribution to a community or institution in the form of classes, lectures, or performances. Residencies are generally for a predetermined length of time and may include meals, lodging, or other support.</p>        |
| Public Art Installations | <p>Works that are visually and physically accessible to the public. Include new works produced or commissioned by your organization this year, as well as works your organization is actively stewarding or maintaining.</p>   |
| Works Commissioned       | <p>A new piece of art (music, dance, visual art, etc.) created by a person selected and (typically) compensated by your organization.</p>  |
| Films Produced           | <p>Produced video content created by your organization. Includes feature films, documentaries, and short films. Do not include videos produced for promotional purposes or recordings of in-person programs. If your organization screened films that it did not produce, include them in "Films Screened" but do not include them here.</p> |
| World Premieres          | <p>Distinct new works your organization premiered that had never been previously seen elsewhere in the world. Each work should only be counted as one type of premiere.</p>  |
| National Premieres       | <p>Distinct new works your organization premiered that had never been previously seen elsewhere in the nation. Each work should only be counted as one type of premiere.</p>   |

|                          |   |
|--------------------------|---|
| Local/Regional Premieres | Distinct new works your organization premiered that had never been previously shown in your region. Each work should only be counted as one type of premiere.                                   |
| Competitions             | Judged contests where people or organizations compete based on merit, skill, popularity, or other criteria. For example, music or dance performance competitions, writing or art contests, etc. |
| Open Rehearsals          | An early performance or rehearsal of a work, to an invited audience, prior to its run of scheduled performances.  |

**Definitions related to all the lines below**

|                |   |
|----------------|---|
| Count          | The number of each item that was offered or produced.   |
| Monetary Value | The total monetary value of funds transferred or awarded through these programs.<br><br><b>This column is required for any line item for which you enter a count below.</b> |

**Definitions for specific line items**

|                             |  |
|-----------------------------|--|
| Fiscally Sponsored Projects | The number of unincorporated projects or groups who received fiscal sponsorship from your organization. Fiscal sponsorship means receiving donated funds on behalf of a project or group without 501(c)(3) status.   |
| Scholarships awarded        | Offering time and space to an artist to work on a specific project, develop artistic works, or make a substantive contribution to a community or institution in the form of classes, lectures, or performances. Residencies are generally for a predetermined length of time and may include meals, lodging, or other support. |
| Other Grants awarded        | Awards of free or reduced-rate instruction based on financial need, merit, or any other reason. Only include the number of students offered reduced rates for programs that have a set rate for instruction.   |

**Definitions related to all the lines below**

|                     |  |
|---------------------|--|
| In Person/ Physical | Offered in person with attendees present or via a physical published work. |
| Digital             | Offered through computer technology, digitally, or virtually.              |

**Definitions for specific line items**

|                       |   |
|-----------------------|---|
| Permanent Exhibitions | Permanently placed works of art, educational installations, or other items of interest in a gallery, public site, other visitation-based setting, or digital format.  |
| Temporary Exhibitions | Temporarily placed works of art, educational installations, or other items of interest in a gallery, other visitation-based setting, or digital format. Only include exhibitions created or curated by your organization. |

|                                |  |
|--------------------------------|--|
| Traveling Exhibitions (Hosted) | Traveling exhibitions created or curated by another institution, and hosted by your organization.                              |
| Published Works                | Printed or digital works, including magazines, newspapers, books, etc., authored, published, or produced by your organization. |
| Private Lessons                | Providing knowledge, insight, or guidance in a one-on-one setting in person.   |

**Definitions related to all the lines below**

|  |   |
|--|---|
| In Person/Physical Programs - Distinct Offerings | Unique productions or programs that took place in person with attendees physically present. Count the number of programs with distinct content as opposed to the number of times each program took place.   |
| In Person/Physical Programs - # of Times Offered | The total number of in-person programs or events. Include all events, whether or not the content was distinct.<br><br><b># of times offered is required for any line item for which you enter Distinct offerings below. The number of times offered must be greater than or equal to the number of distinct programs.</b> |
| Digital Programs - Distinct Live-Streamed        | Unique productions or programs offered digitally via livestream. Only include live programs that had to be watched at a specific time.  |
| Digital Programs - # of Times Live-Streamed      | The total number of digital livestreamed programs or events. Only include live programs that had to be watched at a specific time.  |
| Digital Programs - On-Demand Offerings           | Recorded programs that can be viewed at any time/on demand. Include recordings of programs that you have counted in the previous columns and that were also made available on demand, as well as programs that were recorded specifically for on-demand viewing.  |

**Definitions for specific line items**

|                             |  |
|-----------------------------|--|
| Festivals/Conferences       | Gatherings that may involve performances, vendors, formal meetings, and other activities, generally in recognition or celebration of an occasion, theme, constituency, or topic.   |
| Productions (self-produced) | Staged works presented to an audience, including theater, music, dance, storytelling, readings, etc., that were produced by your organization. Produced refers to casting, choreography, rehearsals, and other activities to develop the production.   |
| Productions (presented)     | Staged works, including theater, music, dance, storytelling, readings, etc., that were presented to an audience by your organization. Presented refers to providing performance space, ticketing, marketing, and other services to make productions developed by other organizations available to the public. Do not include productions that were already entered in Productions (self-produced) above. |
| Broadcast Productions       | Produced audio and/or video content, or other messages intended for broadcast to a dispersed audience, including radio productions, television productions, internet broadcasting productions, and podcasts.   |

|  |  |
|--|--|
| Classes/Workshops (outside of schools)       | Programs presenting knowledge, insight, instruction, or guidance to an audience on a specific topic. This includes single-session classes, workshops, multi-session classes or series, etc. For a multi-class series, enter one distinct class and multiple occurrences to reflect each class session.       |
| Classes/Assemblies/Other Programs in Schools | Programs presenting artistic works, knowledge, instruction, or guidance to an audience on a specific topic that took place in schools. This could include assemblies, classroom visits, afterschool programming, etc.  |
| Field Trips/School Visits                    | Organized visits made by students or other groups to experience your organization's programming, exhibits, or site as a form of educational enrichment.  |
| Guided Tours                                 | Escorted visits of your organization's exhibits, facilities, or grounds, or of a geographic area, to explain the significance, history, or relevance of your collection or a site.   |
| Lectures                                     | Presentations from a speaker to provide knowledge, insight, instruction, or guidance.  |
| Films Screened                               | Motion pictures presented to an audience, including full-length feature films, shorts, documentaries, etc. Include screenings of films that your organization produced, as well as films produced by other organizations.  |
| Readings/Workshops (Developing Works)        | Workshops with the specific focus of reading new works or developing new works.  |
| Community Programs not included above        | Programs or programming focused on community participation, engagement, or activism. Examples include participatory art projects, community arts/music/dance/cultural events, community service events, partnerships with community-based organizations, etc. Please describe your community programs below. |
| Additional Programs not included above       | This could be any program or event not entered above. Please describe your additional programs below.  |

## Attendance/Participation

### Definitions related to all the lines below

|      |  |
|------|--|
| Paid | Money was exchanged for admission or participation.<br><br>If you entered revenue from ticket sales/admissions or tuition/registration fees in the Earned Revenue section, you must enter In-Person or Digital Participation numbers in the paid column. |
| Free | No money was exchanged for admission or participation.   |

### Definitions for specific line items

|                               |   |
|-------------------------------|---|
| Total In-Person Participation | Participants that physically attended live events, performances, exhibitions, and other programming. Report the total number of participants, not unique attendees. For example, if one individual attended multiple programs throughout the year, count each time they attended. |
|-------------------------------|---|

|  |   |
|--|---|
| Total Digital Participation (for mission-related, digitally delivered programming) | Participants that attended, viewed, or listened to digital programs. Digital is defined as program delivery that happens through computer technology, digitally, or virtually. Report the total number of participants, not unique attendees. For example, if one individual attended multiple programs throughout the year, count each time they attended. |
|--|---|

### Attendees Age 18 and Under

This is a breakout or further classification of the attendance entered above. If you do not collect participants' ages, you can estimate this figure. This is required. If you did not have any participants under 18, enter a zero.

|  |                             |
|--|-----------------------------|
| Of your organization's total in-person participation, how many participants were 18 and under? | Attendees age 18 and under. |
|--|-----------------------------|

### Programs in Schools

This section is a breakout or further classification of the programming and participation entered above. This is optional; if you do not provide programs in schools, leave these blank.

|  |  |
|--|--|
| Of your organization's total Educational programs your organization was hired or recruited by a school |  |
| Attendance   | The number of students who attended.         |
| Hours of Instruction   | The number of hours of instruction provided. |

## Social Media and Web

|                     |   |
|---------------------|---|
| Facebook Followers  | People who like or follow your Facebook page. Enter the total followers/likes at the end of your fiscal year. |
| Twitter Followers   | People who follow your Twitter account. Enter the total followers at the end of your fiscal year.             |
| YouTube Followers   | People who subscribe to your YouTube page. Enter the total subscribers at the end of your fiscal year.        |
| Instagram Followers | People who follow your Instagram account. Enter the total followers at the end of your fiscal year.           |
| Vimeo Followers     | People who subscribe to your Vimeo page. Enter the total subscribers at the end of your fiscal year.          |
| TikTok Followers    | People who follow your TikTok account. Enter the total followers at the end of your fiscal year.              |
| Snapchat Followers  | People who follow your Snapchat account. Enter the total followers at the end of your fiscal year.            |

|   |  |
|---|--|
| Other Social Media Followers            | People who follow or like any other social media accounts your organization maintains. |
| Other Social Media Platform Description | Enter the name of the other social media accounts your organization maintains.         |

|                         |   |
|-------------------------|---|
| Website Page Views      | Each time a user visits a web page. Normally page views are equal to or greater than sessions/visits.   |
| Website Sessions/Visits | Visits are the total number of times your website was visited. Normally sessions/visits are equal to or greater than unique visitors.   |
| Website Unique Visitors | A unique visitor is a person who visits a site at least once in a reporting period. Even if that visitor returns, their visit will only count once. How many unique visitors did your website have? |

## Organization Mission

This section seeks to identify whether it is your organization's mission to create, present, or interpret works from a specific ethnic, cultural, or other demographic group (e.g., an African American museum and archive, an LGBTQ choral group, or a women's dance troupe).

If your organization creates, presents, or interprets works from a range of different cultural traditions or demographic groups, answer "no" to this question.

If you select yes, you will see a list of demographic groups to select from.

Is your organization's mission rooted in an explicitly identified ethnic, cultural, or other demographic voice?

- Yes
- No

## Demographic Groups

This section appears because you selected "yes" for the previous question. If your organization's mission is rooted in a specific demographic voice, please select it below. You can select all that apply.

|   |   |
|---|---|
| If your organization's mission is rooted in a specific ethnic, racial, or cultural voice, please select it here. You can select all that apply. | Select from the following: White (non-Hispanic) ; Hispanic/Latino(a); Black; Asian; Middle-Eastern; Indigenous; Additional Group (please state) |
|---|---|

|   |  |
|---|--|
| <p>If your organization's mission is rooted in a specific gender identity, please select it here. (Select all that apply).</p>              | <p>Select from the following: Female; Male; Genderqueer/gender non-conforming; Transgender; Additional Identity (please state)</p> <p>Language for Gender and Sexual Identity questions is taken from recommendations in reports by the UCLA Williams Institute's Gender Identity in U.S. Surveillance Group (commonly called the GenIUSS report), the Sexual Minority Assessment Research Team (the SMART report), and the Human Rights Campaign.</p> |
| <p>If your organization's mission is rooted in a specific sexual orientation, please select it here. (Select all that apply).</p>           | <p>Select from the following: Heterosexual or Straight; Gay or Lesbian; Bisexual; Asexual; Additional Orientation (please state)</p>   |
| <p>If your organization's mission is rooted in a specific age group, please select it here.</p>   | <p>Select from the following: Under 18; 18-64; 65+; Additional Age Grouping (please state)</p>   |
| <p>Please indicate if your organization mission is rooted in serving individuals with a disability.</p>                                     | <p>Select Yes or No.</p> <p>Disability is defined by the Oxford Dictionary as "a physical or mental condition that limits a person's movements, senses, or activities."</p>  |
| <p>If your organization's mission is rooted in serving other populations, please state the additional characteristics of those as well.</p> | <p>Describe additional characteristics.</p>  |

## Organization Audience

This question seeks to identify specific ethnic, cultural, or other demographic groups that your organization serves as audience members or participants. You should only answer "yes" and select a demographic group if your organization's mission is focused on serving them, or if individuals from that group make up a significant portion of your overall audience (roughly 25% or more). If you do not have audience demographics data available, these answers may be based on estimates or perceptions of your audience or participants.

Does your organization primarily serve (or seek to serve) a specific audience?

- Yes
- No

## Demographic Groups

This section appears because you selected “yes” for the previous question. If your organization primarily serves a demographic group, please select it below. You can select all that apply.

|   |  |
|---|--|
| <p>If your organization primarily serves a specific ethnic, racial, or cultural group, select it here. (Select all that apply).</p>   | <p>Select from the following: White (non-Hispanic) ; Hispanic/Latino(a); Black; Asian; Middle-Eastern; Indigenous; Additional Group (please state)</p>   |
| <p>If your organization primarily serves a specific gender, select it here. (Select all that apply).</p>                              | <p>Select from the following: Female; Male; Genderqueer/gender non-conforming; Transgender; Additional Identity (please state)</p> <p>Language for Gender and Sexual Identity questions is taken from recommendations in reports by the UCLA Williams Institute’s Gender Identity in U.S. Surveillance Group (commonly called the GenIUSS report), the Sexual Minority Assessment Research Team (the SMART report), and the Human Rights Campaign.</p> |
| <p>If your organization primarily serves individuals with a specific sexual identity, select it here. (Select all that apply).</p>    | <p>Select from the following: Heterosexual or Straight; Gay or Lesbian; Bisexual; Asexual; Additional Orientation (please state)</p>   |
| <p>If your organization primarily serves a specific age group, select it here. (Select all that apply).</p>                           | <p>Select from the following: Under 18; 18-64; 65+; Additional Age Grouping (please state)</p>   |
| <p>Does your organization primarily serve individuals with a disability?</p>  | <p>Select Yes or No.</p> <p>Disability is defined by the Oxford Dictionary as "a physical or mental condition that limits a person's movements, senses, or activities."</p>  |
| <p>If your organization primarily serves other populations, please state the additional characteristics of constituencies served.</p> | <p>Describe additional characteristics.</p>  |

### Local Community

Choose one community type, based on where the majority of your participants live. If you do not have data available, this can be based on estimates or your perceptions of your audience.



Which term best describes the local community you serve?

|          |   |
|----------|---|
| Urban    | Urban is defined as Located within an urbanized area or cluster with at least 10,000 people. Any area included in the title of a Core Based Statistical Area (CBSA) as designated by the census is considered Urban. For example, Philadelphia is included in the name of the Philadelphia-Camden-Wilmington CBSA.  |
| Suburban | Suburban is defined as Areas adjacent to an urban core with a high degree of social and economic integration with the core (often characterized by commuting ties). The census provides a list of Core Based Statistical Areas (CBSAs); generally, any location within a CBSA that is outside of the city(s) included in the name of the CBSA is considered Suburban. |
| Rural    | Rural is defined as Any area that is not considered Urban or Suburban based upon the definitions above.   |

### COVID-19 Impact

This question is optional. Please only answer this question if the fiscal year you are reporting on includes a span of time impacted by the COVID-19 pandemic. Answers collected from fiscal years outside of the impact of the COVID-19 pandemic will be eliminated during research analysis.

|  |  |
|--|--|
| <p>During the period of the COVID-19 crisis when in-person gatherings were impossible due to stay-at-home orders and/or government health guidelines, did your organization?</p> | <p>Select one of the following: Deliver programming normally; Modify program delivery; Cease program delivery; Not Applicable.</p> <p>Modified programming refers to situations where production or delivery of programmatic content was changed from original intentions to adhere to stay-at-home orders and/or government health guidelines (not including the cessation of all programming).</p> |
|--|--|