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NATIONAL CENTER FOR ARTS RESEARCH

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CDP Survey Streamline

MARCH 17, 2020

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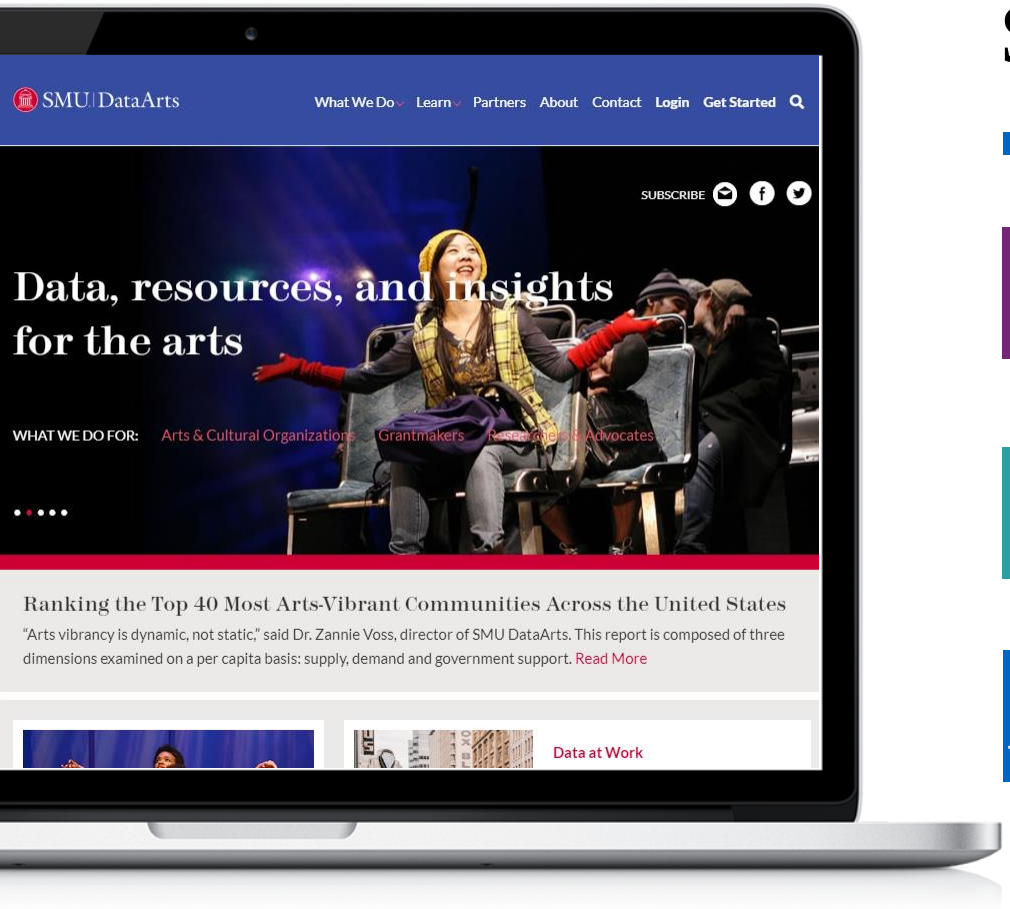

Short-term goals

Improved User Experience

Improve the Data

Increased Benefits

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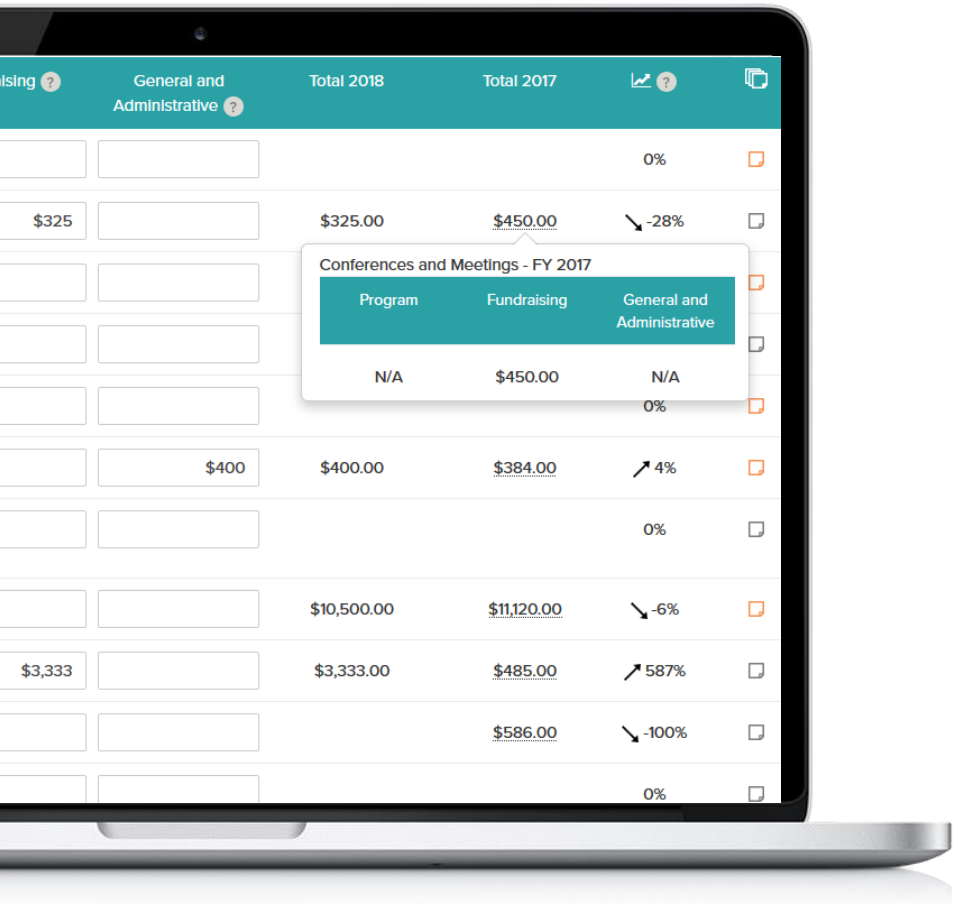
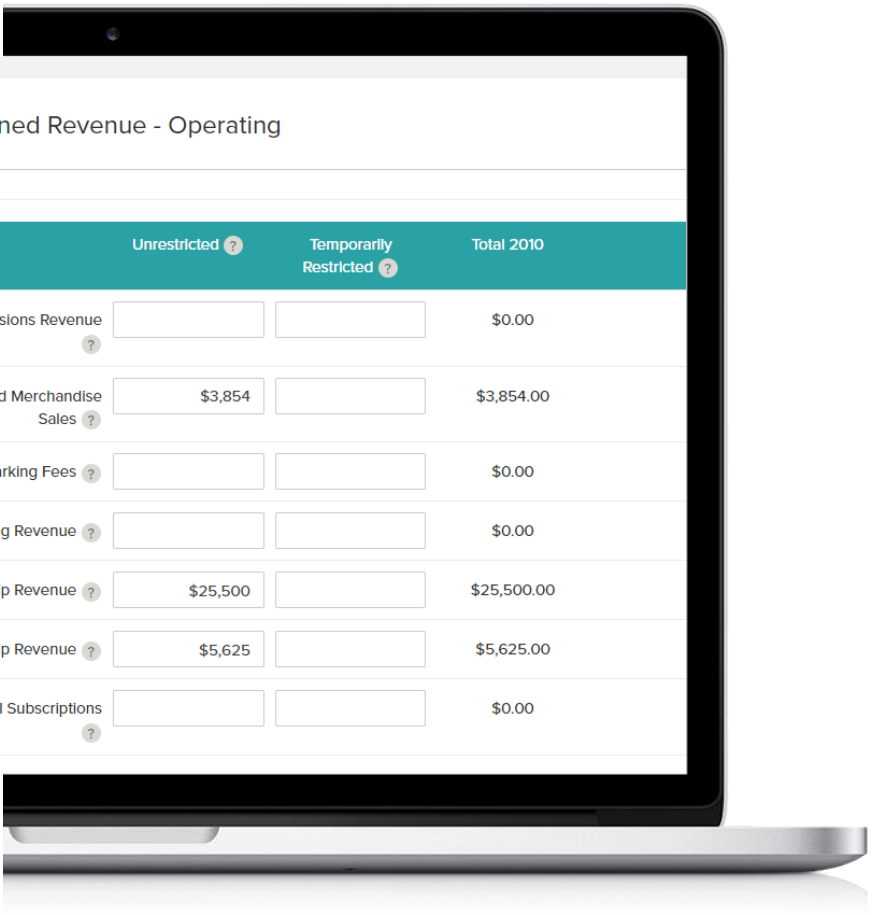


User Experience

- Prior Year and Trend indicators
- Funder Report Generation
- Account and Survey set up (with streamline)
- Spreadsheet upload (after streamline)



CDP Survey Streamline

- Reduce the number of questions
- Decrease time spent
- Preserve the usefulness of the data

Ongoing feedback

- 30 One-on-one calls
- 5 Focus groups
- Open comment: Starts today!

Timeline

- Open comment: March 17 – 31
- Survey Finalized: June 2020
- Streamlined survey live: Late 2020

PROPOSED CHANGES

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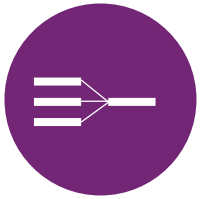

Streamline Financial line items

Streamline Program Activity

Remove entire sections

New lines for improved data

Continuity with previous survey

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Org Set-up and Survey Setup

- Fewer screens
- New section about mission and constituencies served

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Organization Type

501c3 nonprofit organization
Other nonprofit organization
Unincorporated or fiscally sponsored organization
etc.....

Organization Name

EIN Number ____--_____--_____

DUNS Number *optional* ____--_____--_____

Parent Organization Name *(if applicable)*

Fiscal Sponsor Name *(if applicable)*

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Address *Prefilled based on EIN Number*

Legislative Districts *Prefilled based on address*

Website *Prefilled based on EIN Number*

Mission *Prefilled based on EIN Number*

Year Founded *Prefilled based on EIN Number*

NTEE Code *Prefilled based on EIN Number*

NISP Code

Dance
Music
Opera/Musical Theatre
Theatre
etc...

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

◉ Yes ◉ No

If Yes, please state the ethnic or cultural voice.

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Does your organization seek to primarily serve a specific audience? (Select all that apply)

- ☐ No, General Audience
- ☐ Racial/Ethnic Group — *Please describe if selected*
- ☐ Gender - Female
- ☐ Gender - Male
- ☐ Gender – Different Identity — *Please describe if selected*
- ☐ Age Group – Under 18
- ☐ Age Group – 18-64
- ☐ Age Group – 65+
- ☐ Other Audience Type — *Please describe if selected*

Which term best describes the local community you serve?

- ☐ Community – Rural
- ☐ Community – Suburban
- ☐ Community – Urban
- ☐ Not Applicable

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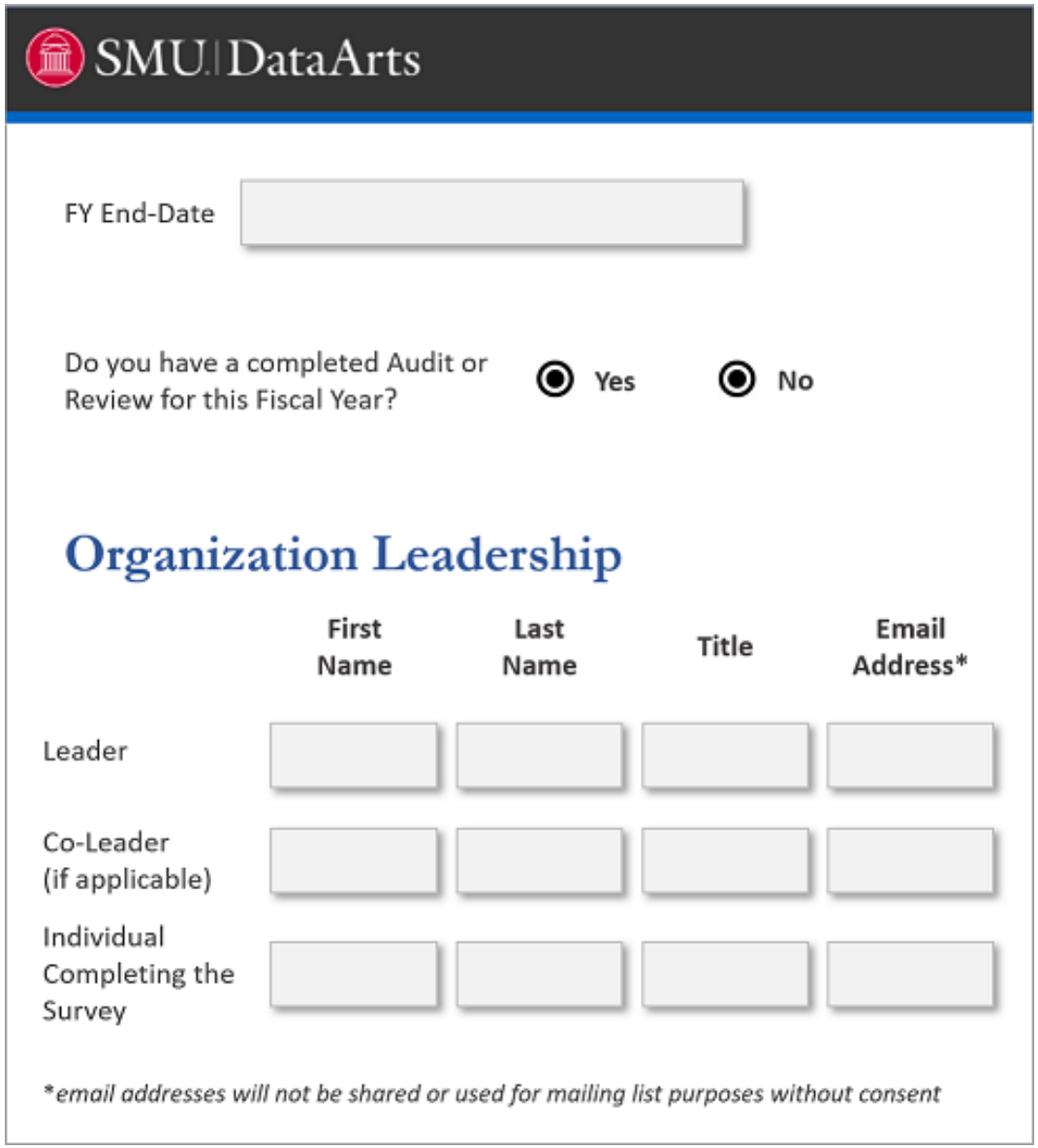

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FY End-Date

Do you have a completed Audit or Review for this Fiscal Year? ◉ Yes ◉ No

Organization Leadership

	First Name	Last Name	Title	Email Address*
Leader				
Co-Leader (if applicable)				
Individual Completing the Survey				

*email addresses will not be shared or used for mailing list purposes without consent

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Balance Sheet Summary

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

Revenue Summary

	Unrestricted	Restricted
Total Operating Revenue		
Non-Operating Revenue		
Total Revenue	*Calculated*	*Calculated*

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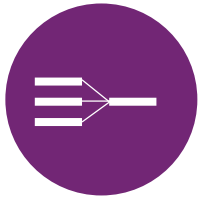
Expenses Summary

Program Expenses	
Fundraising Expenses	
Management and General	
Total Operating Expenses	*Calculated*
Non-Operating Expenses	
Total Expenses	*Calculated*

Change in Net Assets

Total Change in Net Assets	*Calculated*

Earned Revenue



Reduced from 29 lines to 13

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Earned Operating Revenue - Program

Subscription revenue from performances, events, media, and broadcasting	
Membership Fees - Individuals	
Membership Fees - Organizations	
Single Ticket Sales/Admissions	
Tuition and Registration	
Publication Sales	
Gallery Sales	
Contracted services and touring fees (not facility tours)	
Total	*Calculated*

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Earned Operating Revenue – Non-Program

Attendee-related (includes Gift shop, merchandise, concessions, sponsorship revenue, advertising, and other non-program-attendee-related revenue. Does not include ticketing revenue.)	
Royalty/reproduction revenue	
Rental Revenue	
Other earned revenue (rentals, loan interest, application fees, parking fees, co-production revenue, enhancement revenue, other)	*Please describe if selected*
Total	*Calculated*

Total Earned Operating Revenue

Total	*Calculated*

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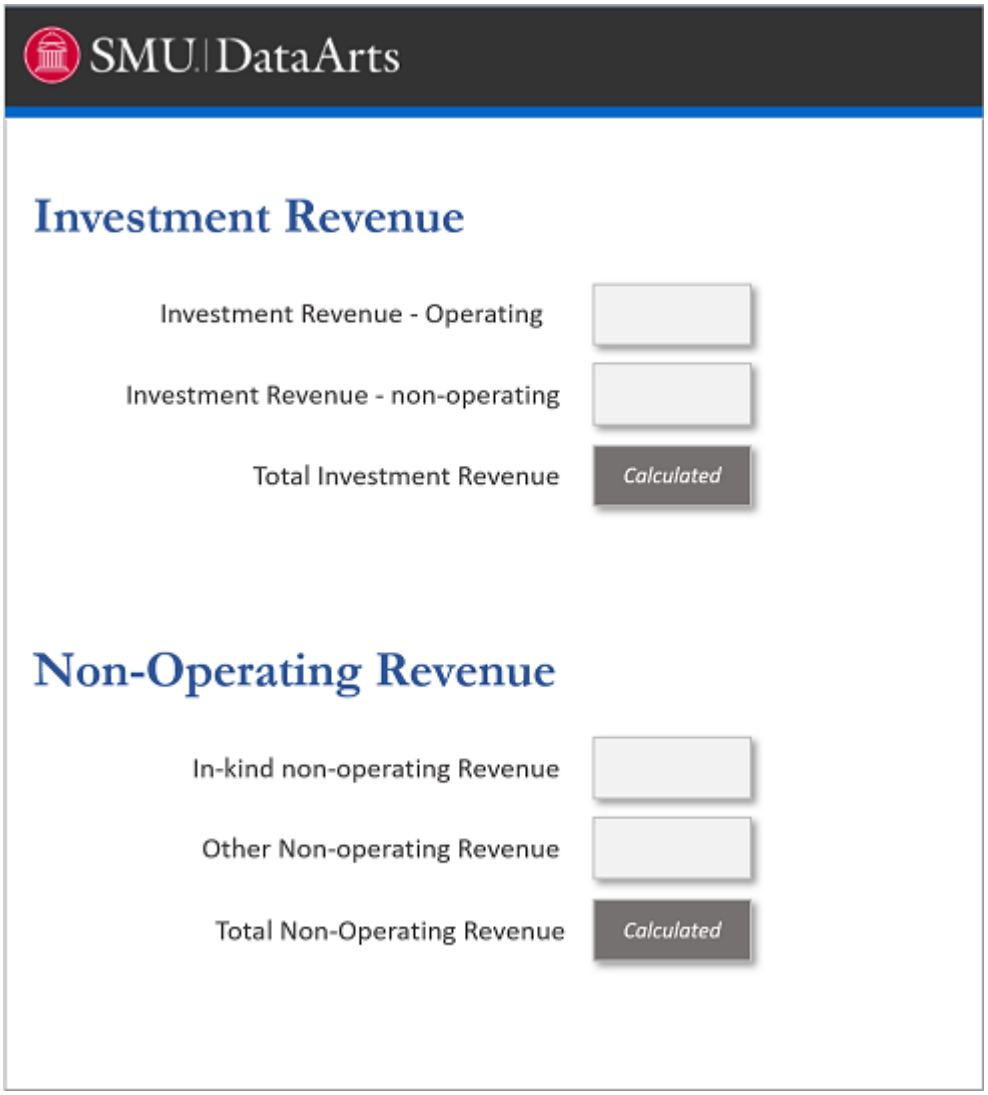

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Contributed Revenue

Contributed Revenue

Additional line for Special Events Revenue - Net

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Contributed Revenue

Currently in a capital campaign?

◉ Yes ◉ No

The term capital campaign refers to any fundraising drive for a specific purpose or purposes that is separate from an annual campaign

	Unrestricted	Restricted	Total	Count Contributors	Average Contribution
Trustee/Board			Calculated		Calculated
Other Individual			Calculated		Calculated
Corporate			Calculated		Calculated
Foundation			Calculated		Calculated
City Government			Calculated		Calculated
County Government			Calculated		Calculated
State Government			Calculated		Calculated
Federal Government			Calculated		Calculated
Tribal			Calculated		Calculated
In-Kind Contributions			Calculated		
Parent org support			Calculated		
Special fundraising events (net)			Calculated		
Other contributions			Calculated		
Net Assets Released from Restriction			Calculated		
Total Contributed Revenue	Calculated	Calculated	Calculated	Calculated	Calculated

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Expenses

- Reduced from 25 lines to 7
- Three columns: Program, Fundraising, General and Management
- Marketing Expense breakout

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Personnel Expenses

	Program	Fundraising	Management & General
W2 Employee Salaries, Benefits, Payroll Taxes			
Independent Contractors			
Professional Fees			
Total Personnel	Calculated	Calculated	Calculated

Visual/Performing Artists ?

Non-Personnel Expenses

	Program	Fundraising	Management & General
Occupancy			
Depreciation			
Other Non-Personnel			
Total Non-Personnel	Calculated	Calculated	Calculated

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Total Operating Expenses

Total Personnel	Calculated	Calculated
Total Non-Personnel	Calculated	Calculated
Total Operating Expenses	Calculated	Calculated

Marketing Expenses

Of the totals above, how much do you spend on marketing personnel and non-personnel expenses?

	Personnel	Non-Personnel	Total
Marketing Expenses			Calculated

Total Non-Operating Expenses

Total Personnel	
Total Non-Personnel	
Total Non-Operating Expenses	Calculated

? Supply the compensation paid to visual or performing artists compensated by your organization to provide your programmatic activities. This compensation should also be included in the above personnel expenses.

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Revenue and Expenses

Add text for context or explanation

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Total Revenue

Total Operating Revenue	*Calculated*
Total Revenue	*Calculated*

Revenue Summary Notes/Context

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Total Expenses

Total (Operating + Non-Operating)	*Calculated*

Expense Summary Notes/Context

CUNA calculations and other indices may populate here to give immediate access to metrics

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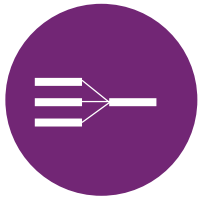
Balance Sheet



Reduced from 23 lines to 12

Two column balance sheet only for organizations with audit or review

Removed Loan and Endowment detail sections

BALANCE SHEET

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Assets

	Unrestricted	Restricted	Total
Current Assets			
Cash and Cash Equivalents			Calculated
Receivables			Calculated
Investments - current			Calculated
Prepaid Expenses & Other			Calculated
Total Current Assets	Calculated	Calculated	Calculated
Long-Term/Non-Current Assets			
Investments - Non-current			Calculated
Fixed assets (net of accumulated depreciation)			Calculated
Other non-current assets			Calculated
Total Long—Term/Non-Current Assets	Calculated	Calculated	Calculated
Total Assets	Calculated	Calculated	Calculated

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Liabilities

	Unrestricted	Restricted	Total
Current Liabilities			
Accounts payable			Calculated
Deferred revenue			Calculated
Loans & other debt			Calculated
Total Current Liabilities	Calculated	Calculated	Calculated
Long-Term/Non-Current Liabilities			Calculated
Total Liabilities	Calculated	Calculated	Calculated

Net Assets

Total Net Assets	Calculated	Calculated	Calculated
Total Liabilities and Net Assets	Calculated	Calculated	Calculated

Lines of Credit

Working Capital, debt ratio, and months of operating cash may be shown here to allow immediate access to metrics

Balance Sheet Summary Notes/Context

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Workforce and Workspaces

Removed Hours worked and FTEs

Added Turnover for employees

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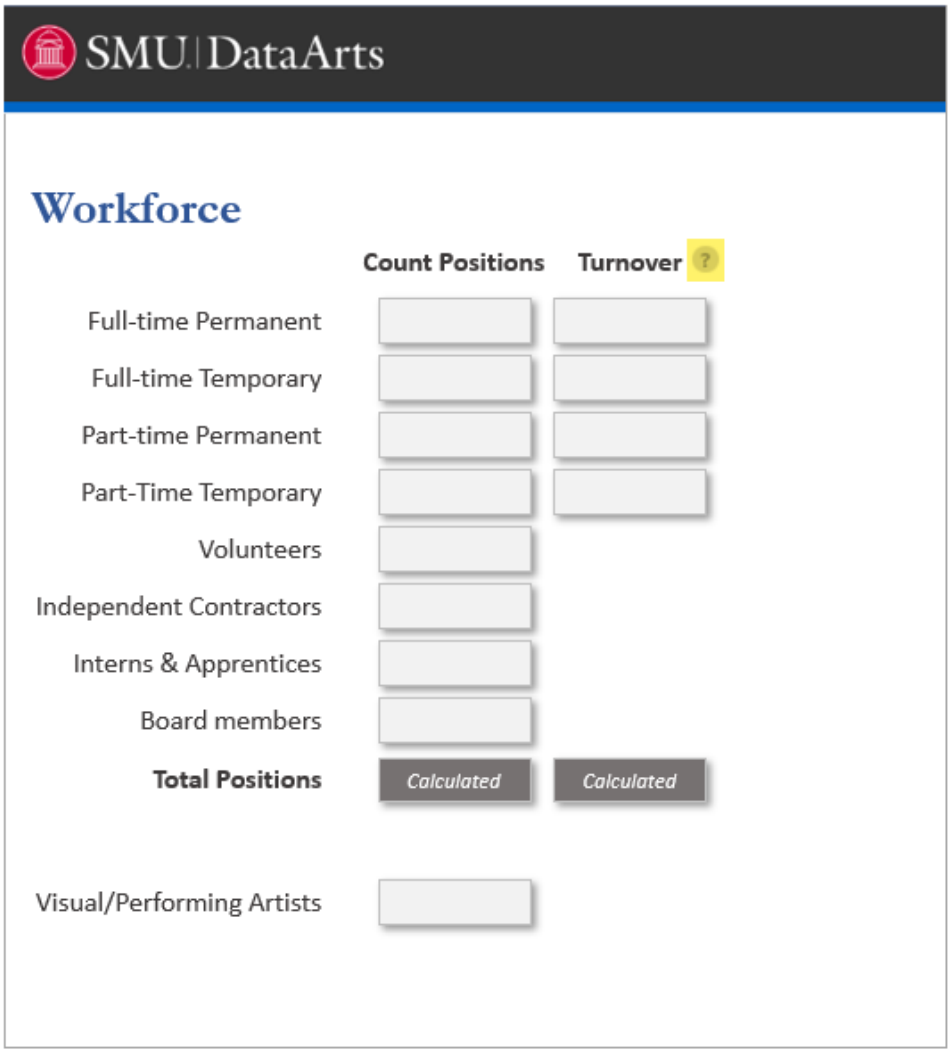
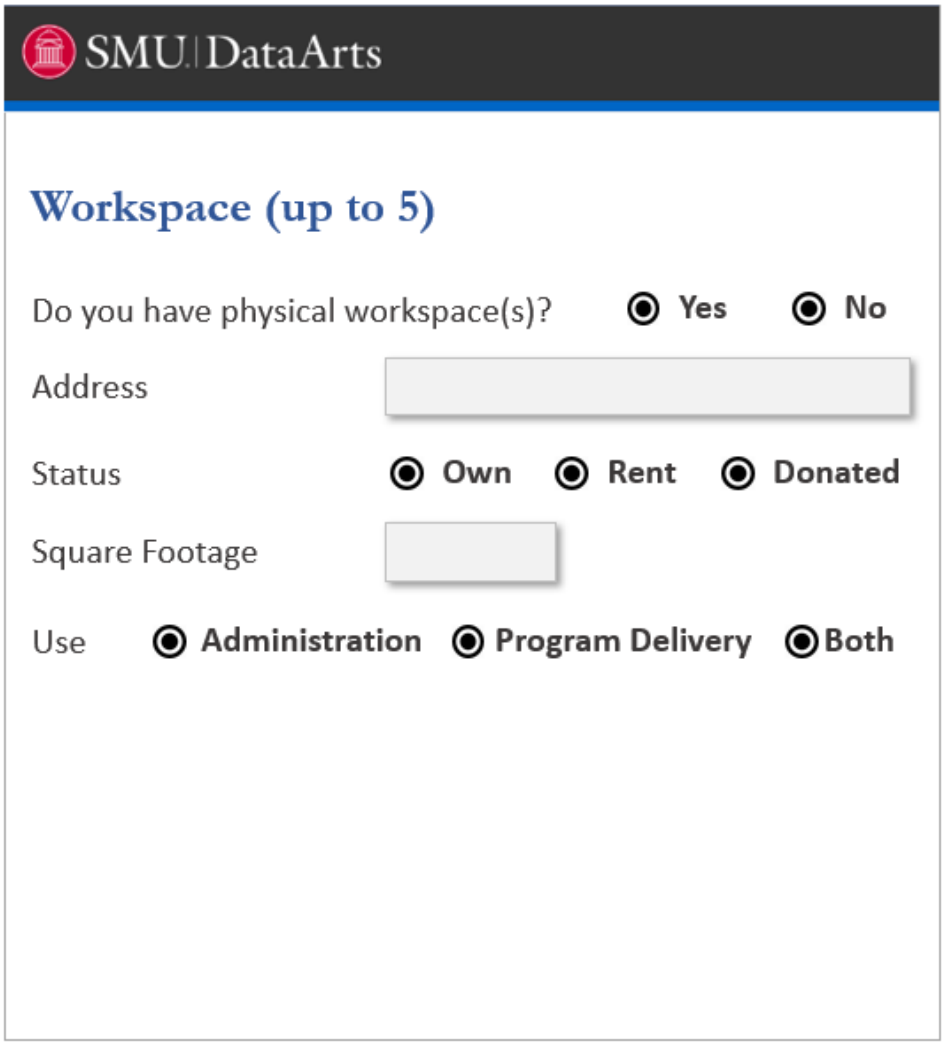


Workforce

	Count Positions	Turnover
Full-time Permanent		
Full-time Temporary		
Part-time Permanent		
Part-Time Temporary		
Volunteers		
Independent Contractors		
Interns & Apprentices		
Board members		
Total Positions	*Calculated*	*Calculated*
Visual/Performing Artists		



Workspace (up to 5)

Do you have physical workspace(s)? ◉ Yes ◉ No

Address

Status ◉ Own ◉ Rent ◉ Donated

Square Footage

Use ◉ Administration ◉ Program Delivery ◉ Both

For the Turnover column, enter the number of employees who left their positions or were fired prior to the completion of their contracts or standard periods of employment.

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Program activity

- Reduced from 32 customized sections to 3 standard sections
- Reduced membership and subscription lines from 15 to 3

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Tickets/Admissions/Package Prices

	Low	High
Tickets/Admissions Prices		
Membership/Subscription Ticket Prices		
Membership/Subscription Package Prices		

free/comped tickets/ admissions do not mean the low price is $0. So low is the lowest non-free price.

Members and Subscribers

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

For example, a family of 4 = 4 subscriptions, etc.

What percentage of last year's subscribers/members renewed in this fiscal year?

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Program Activity

	Distinct: In-Person/ Physical Offerings	Distinct: Digital Offerings	# Times Offered/ Distributed: In-Person	# Times Offered/Distributed: Digital	
Productions (self-produced)					
Productions (presented)					
National and World Premieres					
Local Premieres					
Classes/Workshops (outside of schools)					
Field trips/school visits					
Guided Tours					
Classes/Assemblies/ Other Programs in Schools					
Lectures					
Permanent Exhibitions					
Temporary Exhibitions					
Traveling Exhibitions (Hosted)					
Works Commissioned					
Published Works					
Films Screened					
Films Produced					
Festivals					*This represents number of events at festivals*
Public Readings/Workshops					
Community Programs (not included in other lines)					*Text box for explanation*
Other					*Text box for explanation*

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Example: Historical Society

- 3 in person lectures
- Genealogy class offered 4 times in person and 2 times as an online webinar
- One local history print review published twice a year, distribution of 200 per issue

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Program Activity

	Distinct: In-Person/ Physical Offerings	Distinct: Digital Offerings	# Times Offered/ Distributed: In-Person	# Times Offered/Distributed: Digital	
Productions (self-produced)					
Productions (presented)					
National and World Premieres					
Local Premieres					
Classes/Workshops (outside of schools)	1	1	4	2	
Field trips/school visits					
Guided Tours					
Classes/Assemblies/ Other Programs in Schools					
Lectures	3		3		
Permanent Exhibitions					
Temporary Exhibitions					
Traveling Exhibitions (Hosted)					
Works Commissioned					
Published Works	2		400		
Films Screened					
Films Produced					
Festivals					*This represents number of events at festivals*
Public Readings/Workshops					
Community Programs (not included in other lines)					*Text box for explanation*
Other					*Text box for explanation*

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Example: Arts Center

- 5 productions presented, 4 shows each
- 3 different classes which each met 6 times
- Three temporary exhibits
- Docent led tours offered once a week

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Program Activity

	Distinct: In-Person/ Physical Offerings	Distinct: Digital Offerings	# Times Offered/ Distributed: In-Person	# Times Offered/Distributed: Digital	
Productions (self-produced)					
Productions (presented)	5		20		
National and World Premieres					
Local Premieres					
Classes/Workshops (outside of schools)	3		18		
Field trips/school visits					
Guided Tours	1		52		
Classes/Assemblies/ Other Programs in Schools					
Lectures					
Permanent Exhibitions					
Temporary Exhibitions	3				
Traveling Exhibitions (Hosted)					
Works Commissioned					
Published Works					
Films Screened					
Films Produced					
Festivals					*This represents number of events at festivals*
Public Readings/Workshops					
Community Programs (not included in other lines)					*Text box for explanation*
Other					*Text box for explanation*

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Program activity

- Attendance all in one section
- School-related attendance breakout
- Programmatic Financial support section

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Attendance/Participation

	Paid	Free	Total
Total In-Person			Calculated
Of Total In-Person, those 18 and under*			Calculated
Total Digital (for mission-related, digitally-delivered programming)			Calculated
Total In-Person & Digital	Calculated	Calculated	Calculated

Digital is defined as program delivery that happens via digital, virtual, remote, or distance means

School-Related Attendance/Participation Breakout

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

	Attendance	Hours of Instruction
School-Arranged Programs in Schools		

Program Summary Notes/Context

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Programmatic Financial Support Breakout

These financial values should be included within the expense section above. Of expenses reported under Program, Fundraising, and Management/General, how much in total was allocated to the below activities?

	Units Awarded (#)	Total Financial Support ($)
Fiscally Sponsored Projects		
Residencies		
Scholarships/Tuition Assistance		
Other Grants awarded		

Social media and website

Net assets released from restriction detail

In-Kind revenue detail

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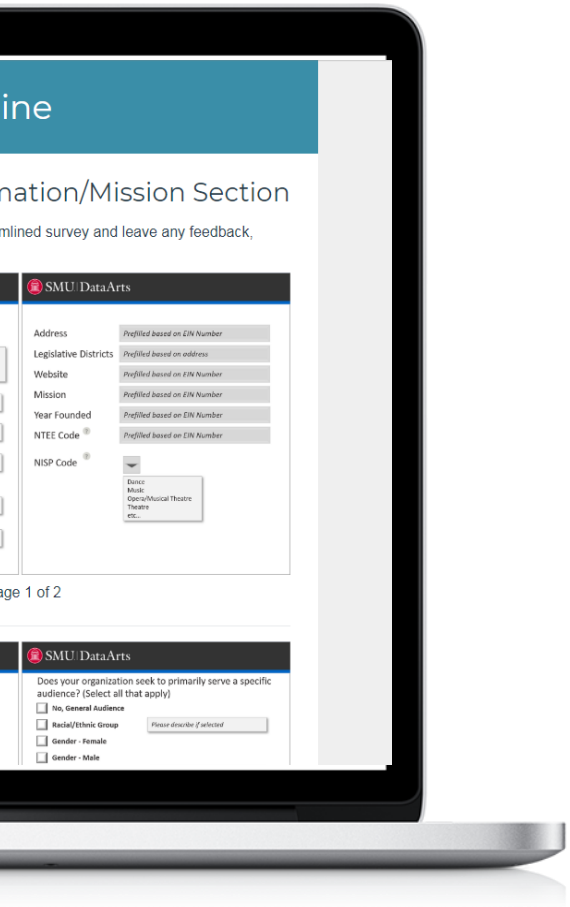

Participate in open comment

- Will these changes save you time?
- Will the streamlined survey accurately represent your organization?
- Where are better definitions needed?

https://culturaldata.org/pages/cdp-survey-streamline/

Open comment: March 17 - 31

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Things to know…

- We will provide documentation of the final survey in June
- We will provide 30 days notice before the release date in late 2020
- Your existing CDPs will be transformed to the new format

Questions?

https://culturaldata.org/pages/cdp-survey-streamline/

Open Comment: March 17 - 31