SMU DataArts

Getting Started with the Cultural Data Profile

A guide to completing your first Cultural Data Profile survey

Watch the webinar recording

smu.edu/dataarts

Updated Winter 2025

About SMU DataArts

For more than a decade, we've provided data-informed insights and resources to the arts and cultural sector.

DataArts began in Pennsylvania as the Cultural Data Project in 2004 as a collaborative venture of visionary funders and arts advocates with a goal to address a longstanding need for detailed, reliable information on nonprofit arts, culture, and humanities organizations, and by doing so, strengthen management, philanthropy, research, and public policy. In 2018, DataArts merged with Southern Methodist University's National Center for Arts Research, a nationally recognized research center developing reports based on a uniquely comprehensive set of data that models the arts and culture ecosystem.

As a combined entity, SMU DataArts employs cutting-edge research techniques and high-powered computing to test hypotheses, build theory, and increase understanding of the arts and cultural sector. Our research efforts range from academic papers published in leading journals, applied research undertaken with community partners, and actionable insights shared directly with arts practitioners.

Our Mission

As a combined entity, our mission is to provide and engage organizations and individuals with the evidence-based insights needed to collectively build strong, vibrant, and equitable arts communities.

Our Commitment to Equity, Diversity, Accessibility, and Inclusion

SMU DataArts recognizes that our society is characterized by a complex web of inequities, and we are committed to making research, tools, and resources accessible to all persons regardless of race, age, gender expression, sexual orientation, national origin, disability, and/or socioeconomic status. We strive to conduct our work without bias or preference, and we value input and creativity from diverse perspectives. We prioritize data collection and research projects that celebrate the arts and culture of communities of color, and advance equity in access to art, cultural funding, and the sector at large. We commit to contributing to a more equitable funding model for organizations rooted in, led by, or serving people and communities of color. Our equity work is a continuous process requiring ongoing input from the field, accountability, and evaluation.

- We hold ourselves accountable by sharing progress on our website and providing concrete evidence of our work in this regard.
- We set goals and define the progress we will make.
- We actively invite input from the field on our plans and our actions.
- We regularly address equity, diversity, accessibility, and inclusion (DEAI) concerns within our organization and report updates to all staff at monthly meetings.

What We Do

COLLECT

High quality longitudinal data on the arts sector

RESEARCH

The health and vitality of the arts and cultural sector

DEVELOP

Data collection and research that responds to evolving sector needs

ENGAGE

The field with insights from the data that people can use

The Cultural Data Profile

The Cultural Data Profile (CDP) is a free and secure online survey that collects financial and programmatic data from nonprofit arts, culture, and humanities organizations so they can apply for grants, gather insights, use data to strengthen a case for support, and contribute to nationwide research. As of 2021, over 19,000 organizations have contributed data.

SMU DataArts uses the CDP to collect and organize data from across the arts and cultural sector. Each CDP contains financial and programmatic data for a single fiscal year.

Because together, we are stronger.

Cultural nonprofits complete the CDP

SMU DataArts creates a national longitudinal dataset

Arts & Cultural Organizations

- Use data to streamline the grant application process
- Apply for grants, gather insight, and share your data to strengthen the case for arts and culture

Grantmakers

- Access data and reports that lead to higher-impact philanthropy
- Standardize data to streamline your grant application process

Researchers & Advocates

- Explore datasets, answer questions, and communicate about the sector's assets and challenges
- Use evidence-based support to advocate for policy and funding

Incorporating the Cultural Data Profile into Your Workflow

To make the most of your CDP, we recommend completing it as part of your year-end budgeting process. By aligning the completion of your profile with your fiscal year-end, you can ensure that your financial data is up-to-date and ready for when grant opportunities arise. Below is an example of what that annual workflow might look like:

Preparing for the Survey

To complete the Cultural Data Profile, you're going to need both financial and non-financial information for your organization.

Gather Essential Documents

Listed are several documents that will be helpful throughout the process.

Smaller organizations may rely on spreadsheets and other tools used to track financials throughout the year.

1. **Audit or review documents** (if available)
2. **Year-end profit and loss statement**
3. **Balance Sheet/990 Forms**
4. **Ticketing and attendance records**
5. **Staffing records**
6. **Donor records**

Download the Survey Questions

A copy of the full survey is available for download on our website so you can be sure you have all information needed and make prioritize efficiency when requesting documents from colleagues.

Visit Our Website

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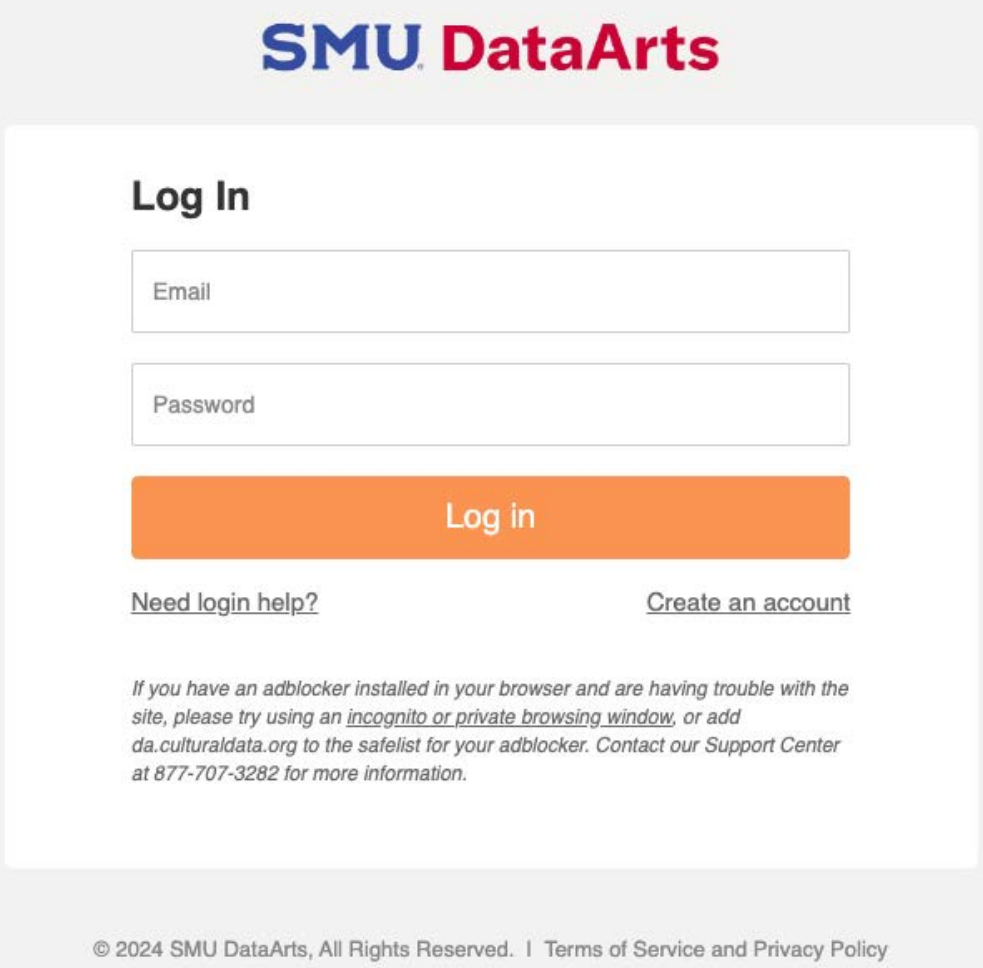
Create a CDP Account

If you have not already created an account, this will be your next step. Multiple colleagues from the same organization may create an individual account. Within your individual account, you may connect to all organizations you are personally affiliated with (some may be affiliated with multiple organizations). Only individuals with your login credentials will be able to access your personal account and the connected organizations.

To create an account for the first time, click the ‘create an account’ link option and follow the instructions.

Login to the CDP



Connect your Organization

To connect your individual account to an organization, select ‘Join or Set Up’ near the top of your screen and follow the steps outlined below:

- Search for the organization(s) in our database.
- If the organization already exists, request to connect your account to the existing profile.
  - Requests will be sent to the organization’s administrator.
  - If the administrator account has been lost or changed, please contact our Support Center to help troubleshoot.
- If the organization does not exist, follow the steps to set up a new organization profile.

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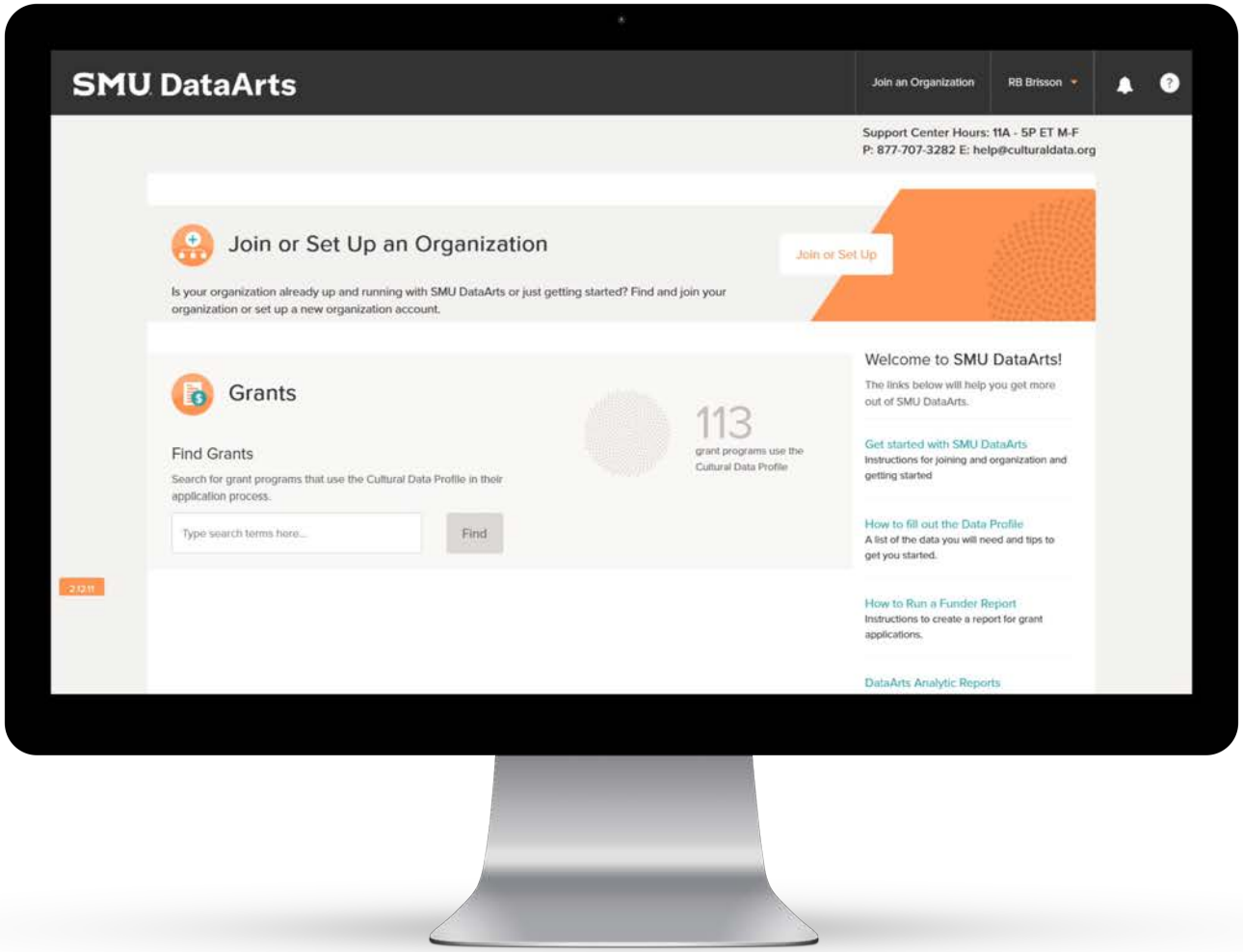

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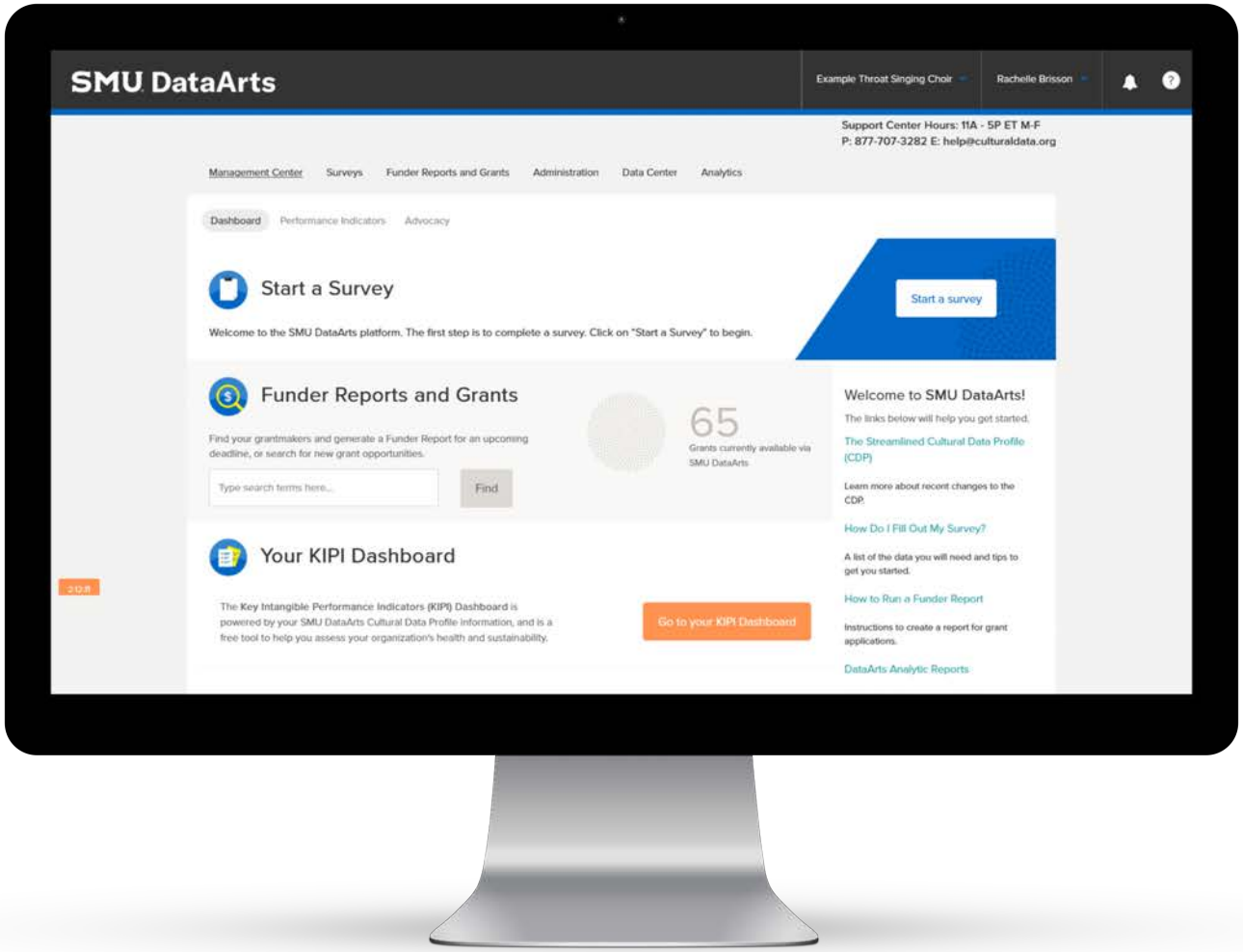
Customize Survey Settings

As you start a new survey, you will be prompted with a short set of questions that will help the platform determine which survey is most relevant for your organization.

The CDP survey is tailored based on organization size and type to help ensure that questions are relevant to your organization.

From the dashboard select the ‘Start a Survey’ and respond to the financial and programmatic questions as best as possible. The setup process takes about 5 minutes to complete.

These settings can be modified in future years as your organization grows and changes.



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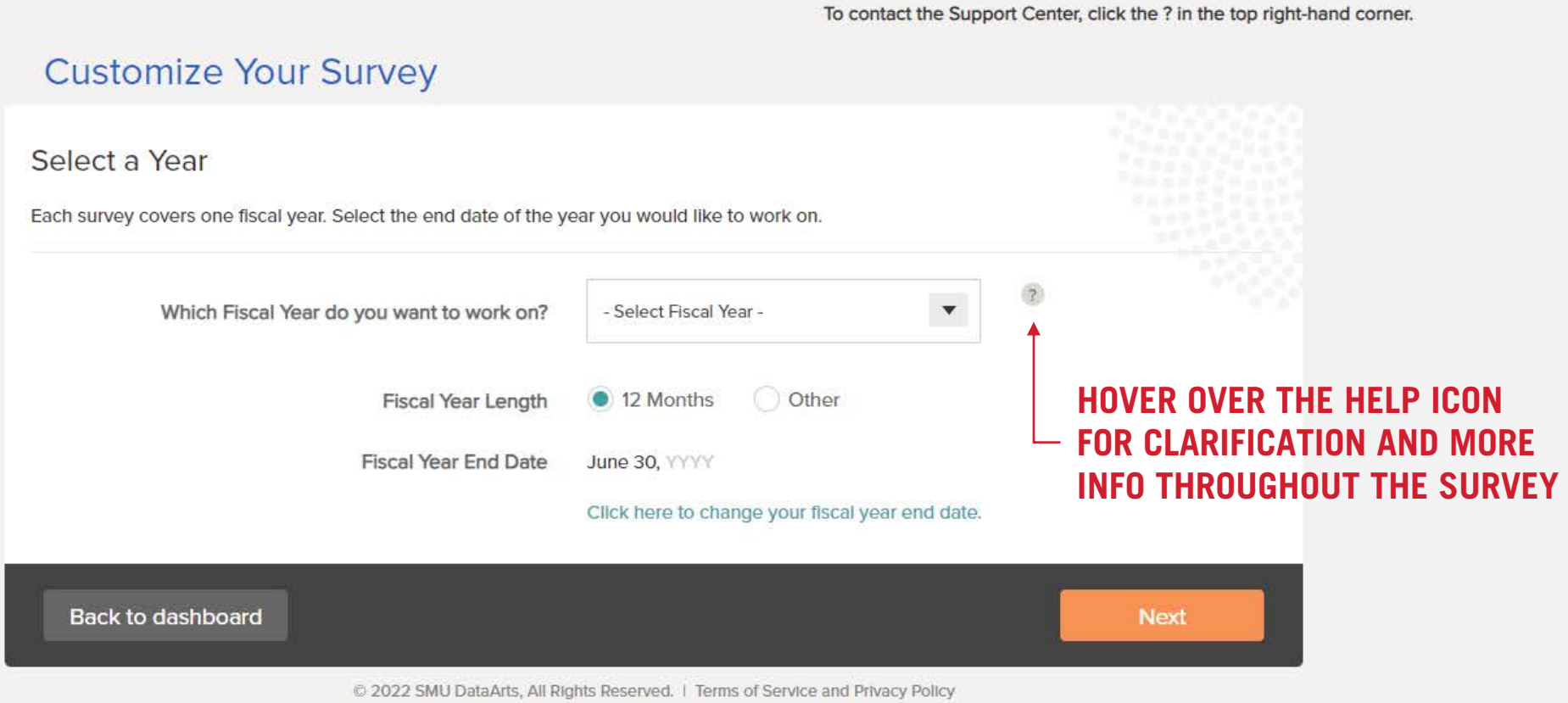

SURVEY SETTINGS

Select the year you want to work on from the drop-down menu and confirm that the full fiscal year-end date is correct.

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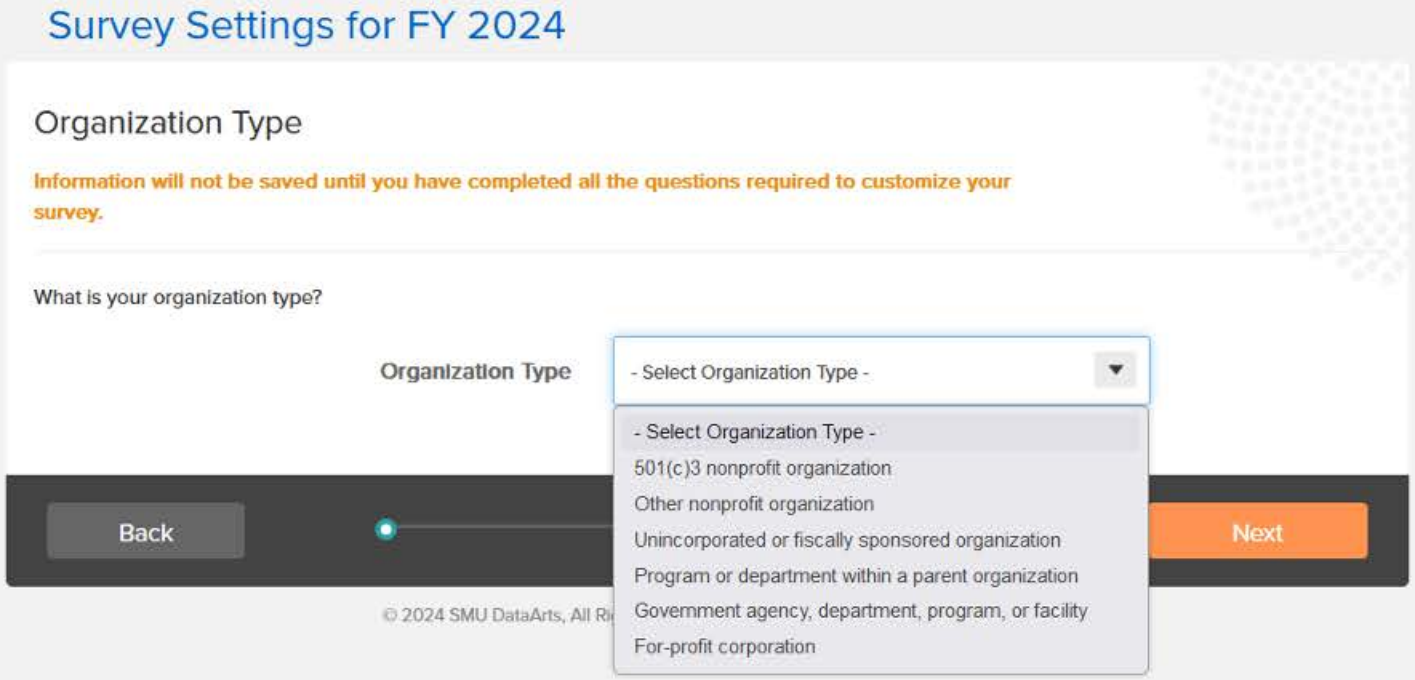

SURVEY SETTINGS

Select the organization type from the drop-down menu. Most organizations that complete the CDP are 501(c)3s.

Fiscally-sponsored organizations are new or existing organizations that have not yet acquired 501(c)3 status and rely on a nonprofit sponsor to apply for and receive grant funding.

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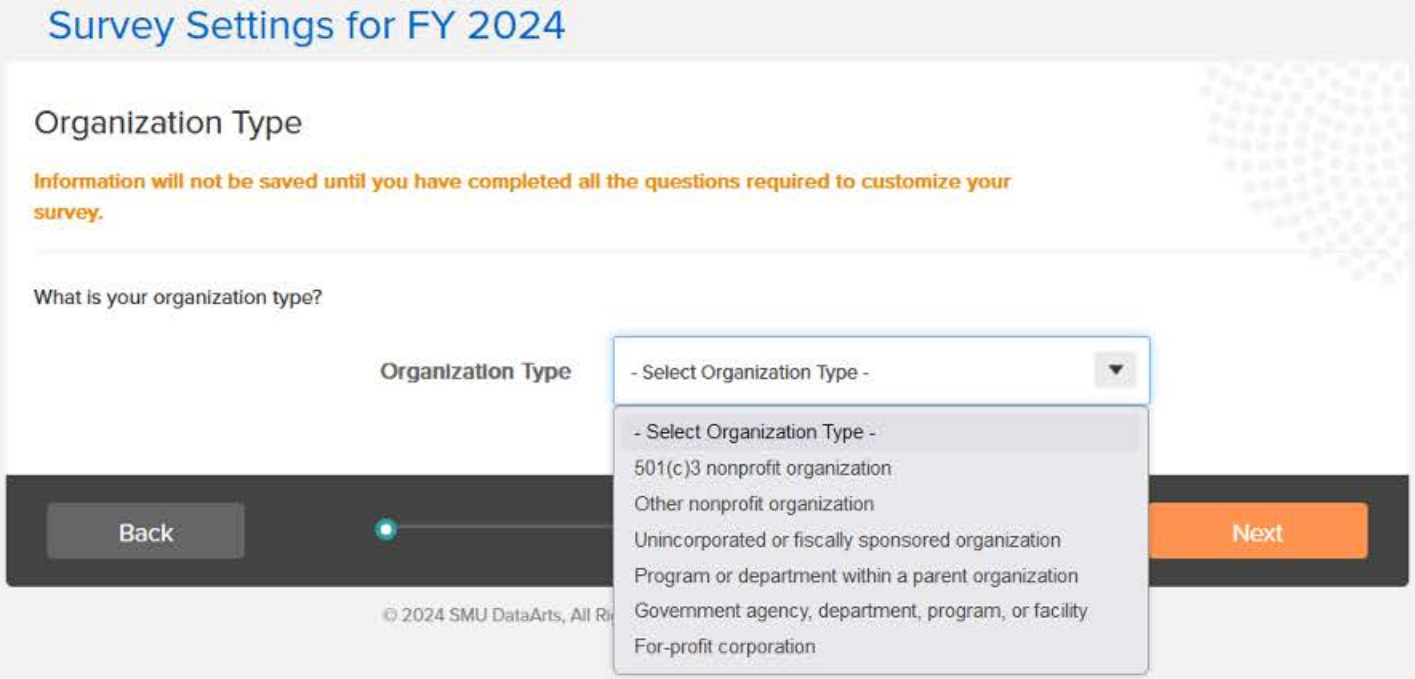

SURVEY SETTINGS

An entity under a parent organization is a project, program, or department with an arts or cultural focus that is part of a larger organization. The larger organization is called a parent organization and holds oversight on management, operations, and finances. An example would be a history museum run by a university, or an arts therapy program run by a hospital.

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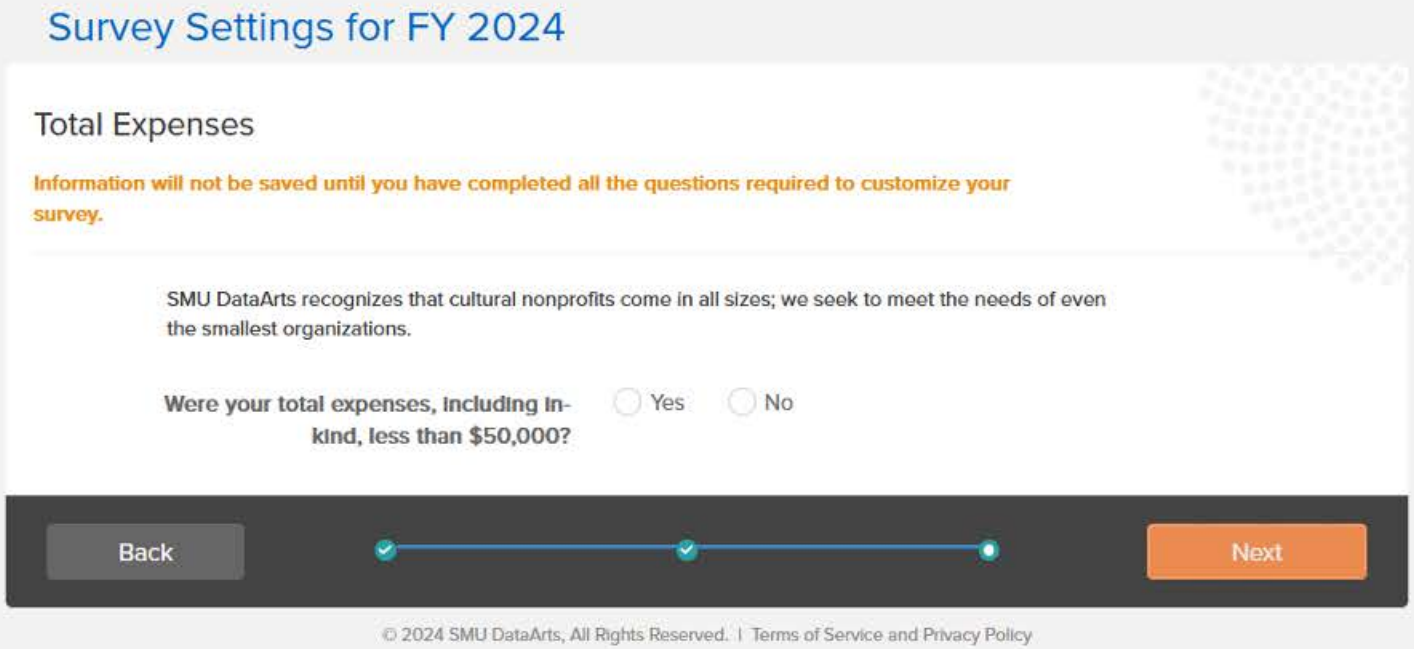

SURVEY SETTINGS

The next question asks if the organization's total expenses were less than $50,000 for the fiscal year reported on.

Answering 'yes' to this question will categorize the organization as 'small,' and the survey will be shorter and streamlined for organizations with less detailed data available.

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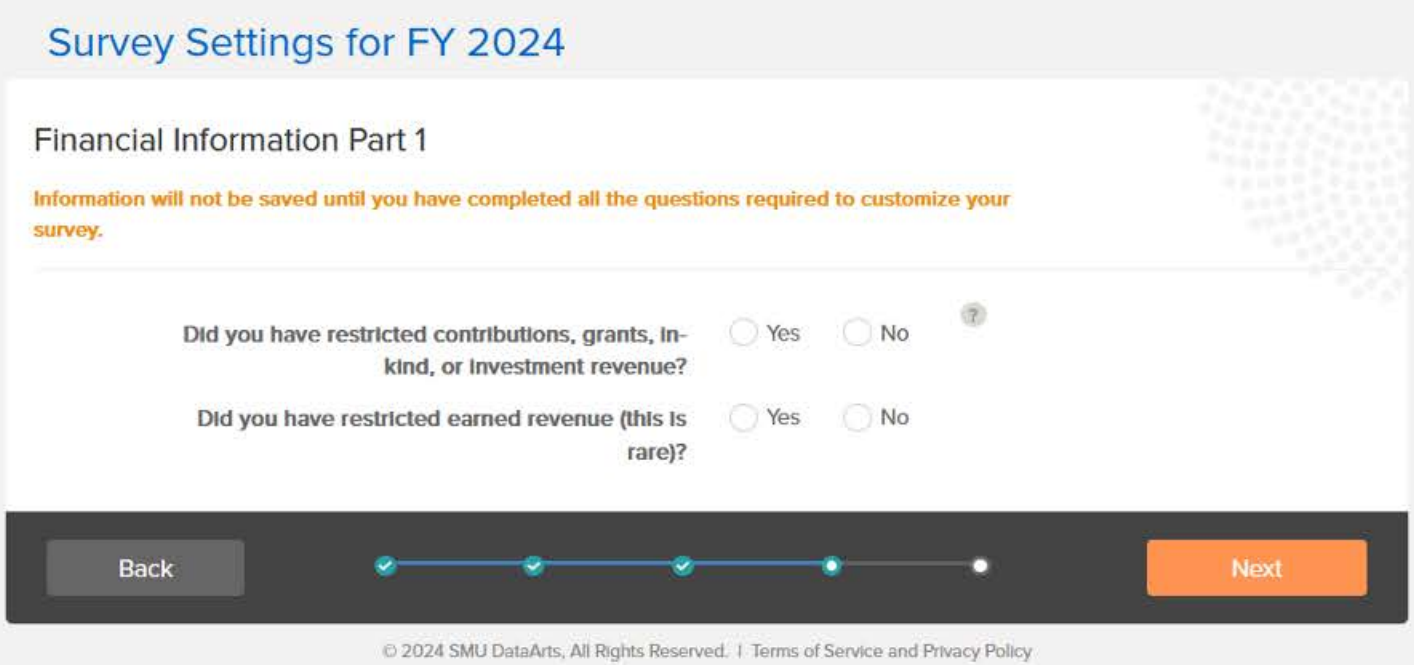

SURVEY SETTINGS

The next several questions will ask about your organization's finances in more detail, including whether the organization was reviewed or audited, if the organization has restricted revenue, non-operating revenue, and expenses.

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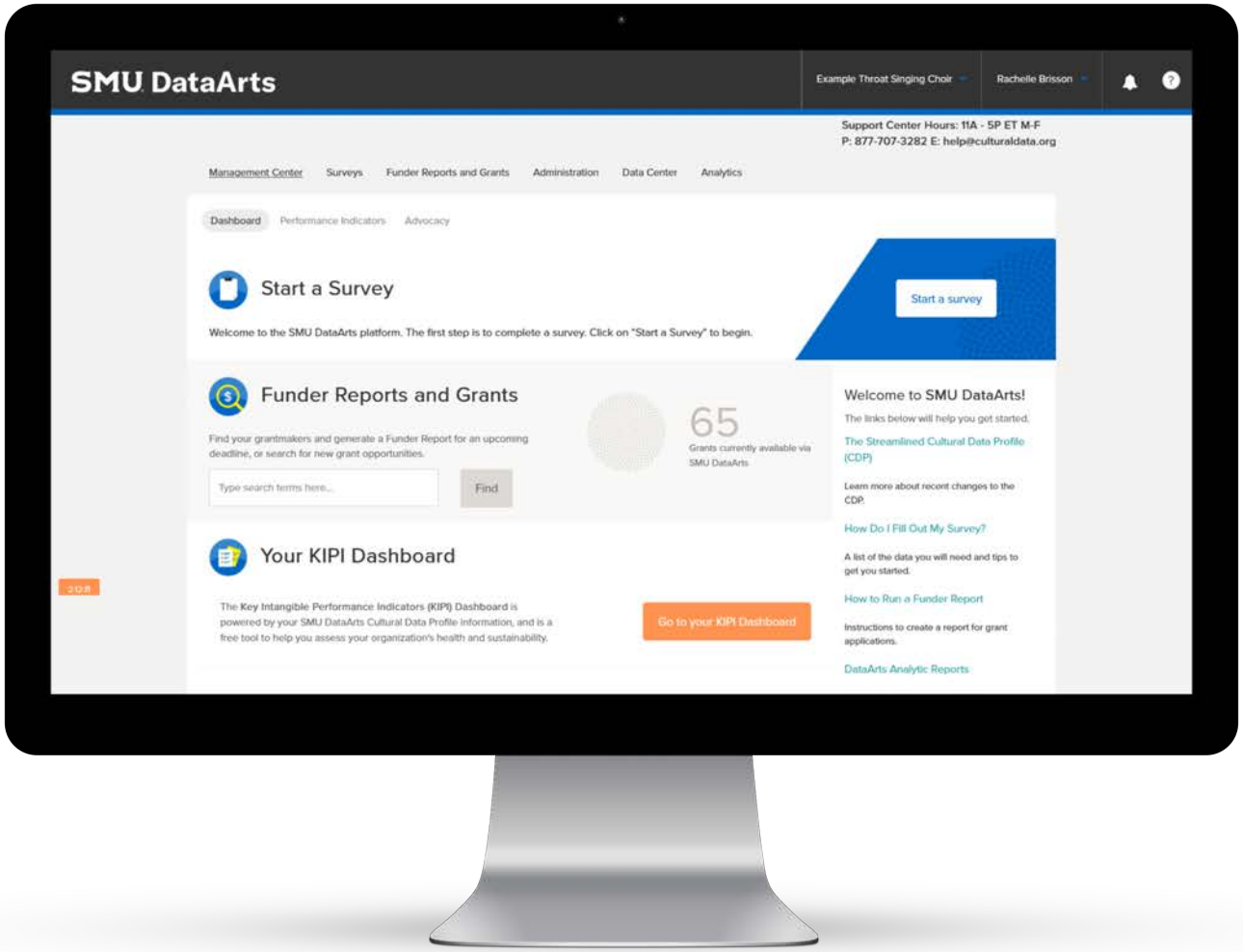
Our platform is designed with you in mind.



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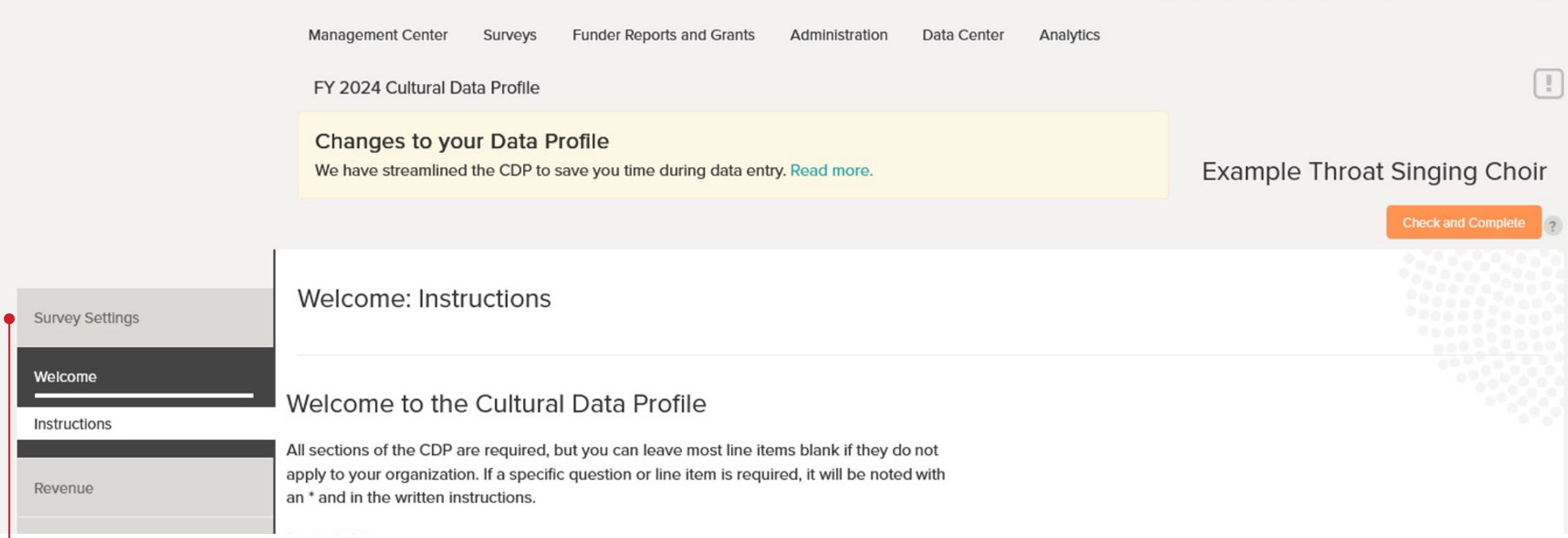

SURVEY TOUR

On the left-hand side of the screen is the internal navigation for the Data Profile that will help you quickly move around from section to section.

To modify the survey customization, select ‘Survey Settings’ and edit any the responses.

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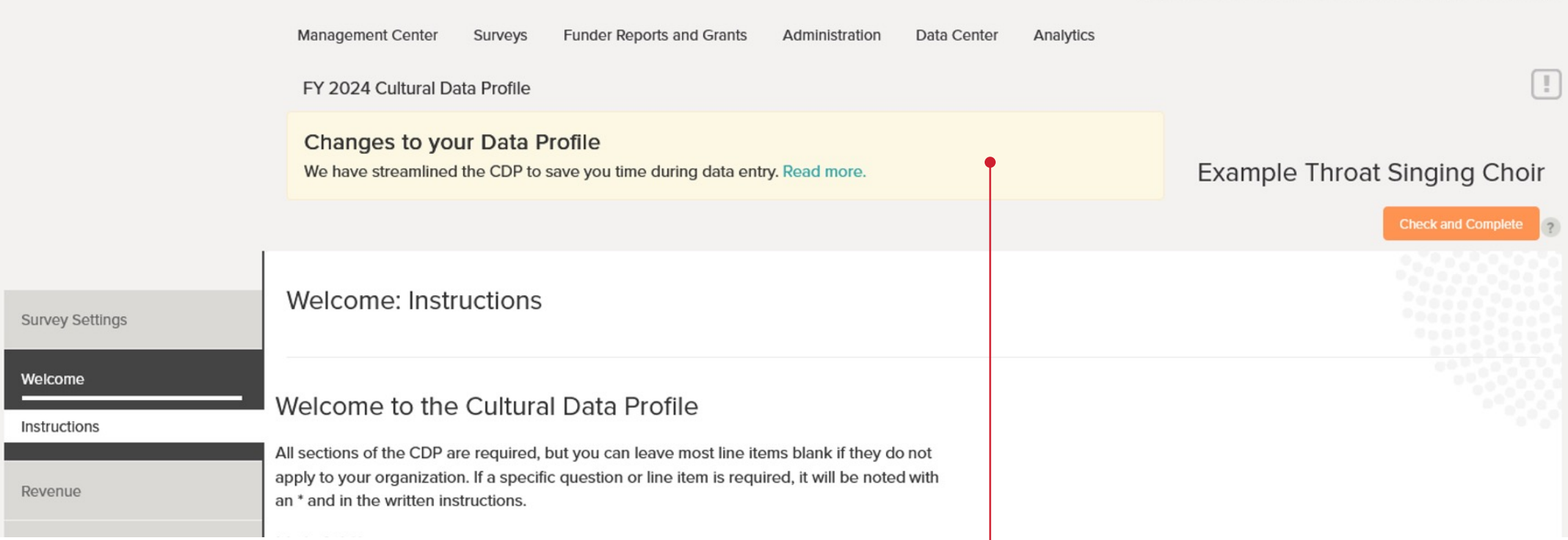

SURVEY TOUR

Near the top of your screen is a general announcement box. If there is any important news or announcements regarding the CDP platform, such as platform maintenance, information will be posted here.

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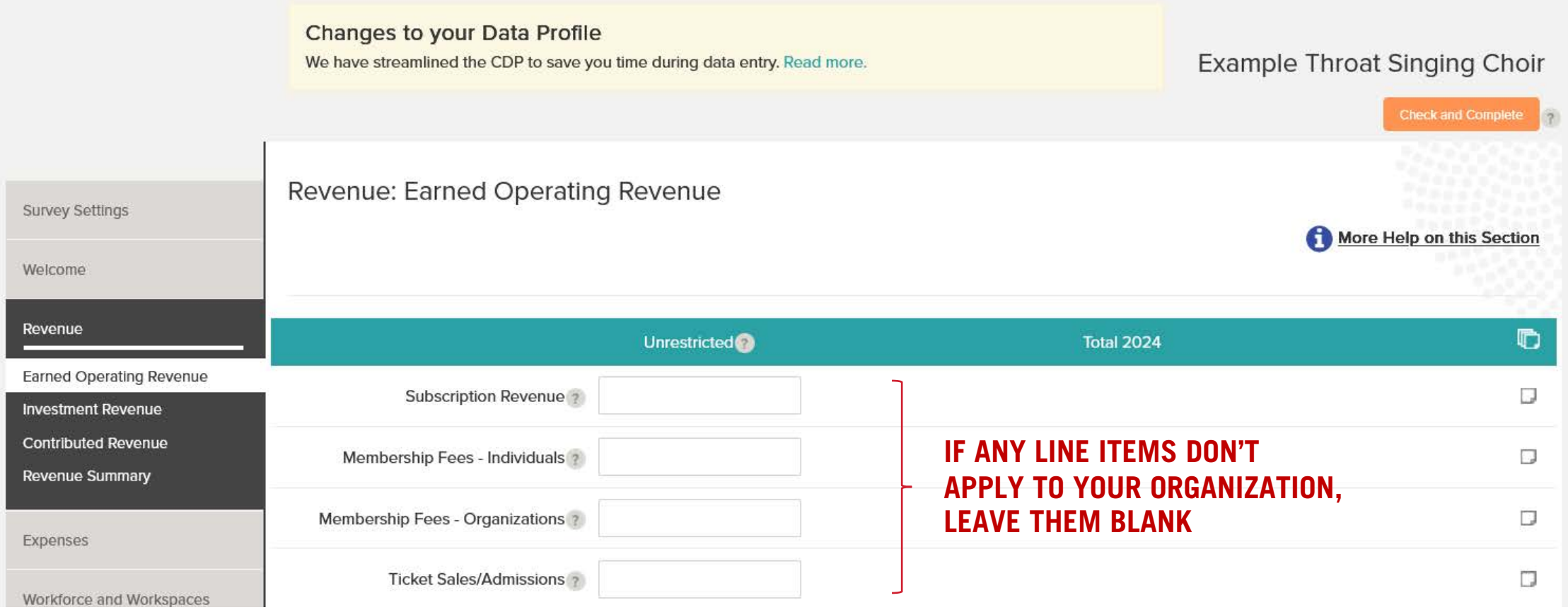

SURVEY TOUR

Near the top of each subsection is a link for 'More Help on this Section' which that will redirect you to our Knowledgebase containing helpful articles about the most frequently asked questions for each section.

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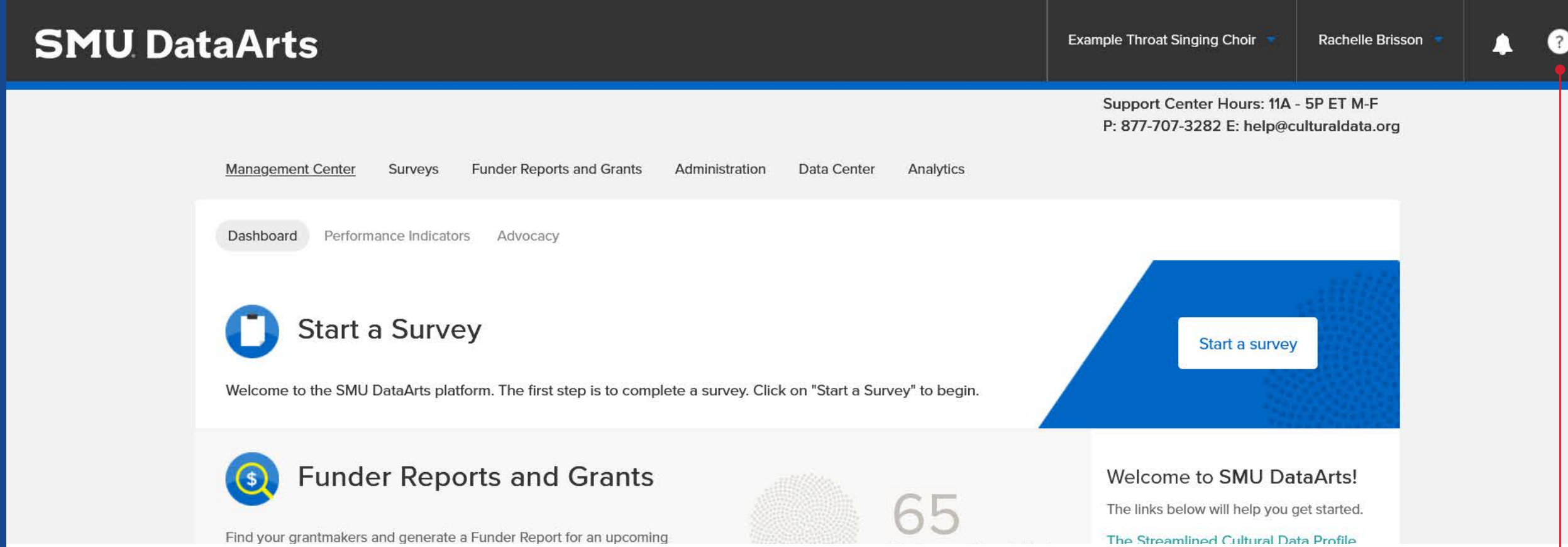

SURVEY TOUR

In the main navigation bar at the top of your screen is another help icon. This remains active and visible within all sections of the platform and will bring up a search field for our online Knowledgebase, as well as the contact information for our Support Center.

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Quick Facts

1

Audits or reviews might be less detailed than the CDP

An audit might have a line for earned revenue but no further details. Since the CDP asks for a more line items under earned revenue, you might need to look at internal financial statements to find the information needed.

2

Financial statements might be more detailed than the CDP

QuickBooks commonly provides more details than the CDP asks for. In these cases, simply add up the line items from the financial statements and input them as one number in the CDP.

3

The CDP might use different terminology than other records

To help guide you through some of the more common terminology differences, the CDP contains definitions and instructions for line items where possible.

Help & Support

Our Support Center is available from 10:30am to 7pm ET, Monday through Friday.

Call us at 877-707-DATA (3282) or email help@culturaldata.org.

We offer on-demand interpretation in many languages. Please ask the specialist when you are connected.
Ofrecemos interpretación a pedido en muchos idiomas, pregunte al especialista cuando esté conectado.

For the best possible experience, please be sure you are using the latest version of your web browser.

Contact Us

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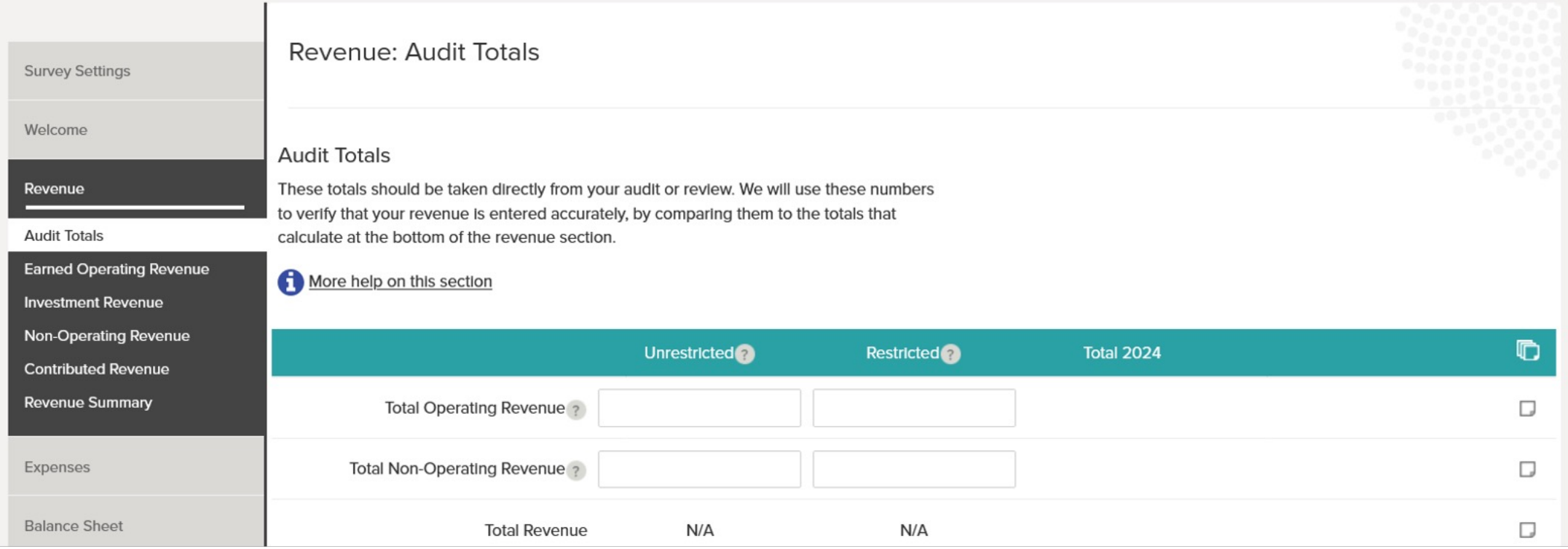
Financial Sections

Once the survey settings are complete, you are now at the heaviest lift of the survey. You may save your progress at any point, but please expect to spend most of your time on this portion of survey.



REVENUE – AUDIT TOTALS

The first section of the survey is Revenue with six subsections that go into specific details. Only organizations that selected audit or review in the survey settings portion will see the subsection for Audit Totals. Enter the key revenue totals from the audit, which will be used as a check against other sections and help ensure correct financials are entered throughout the survey.

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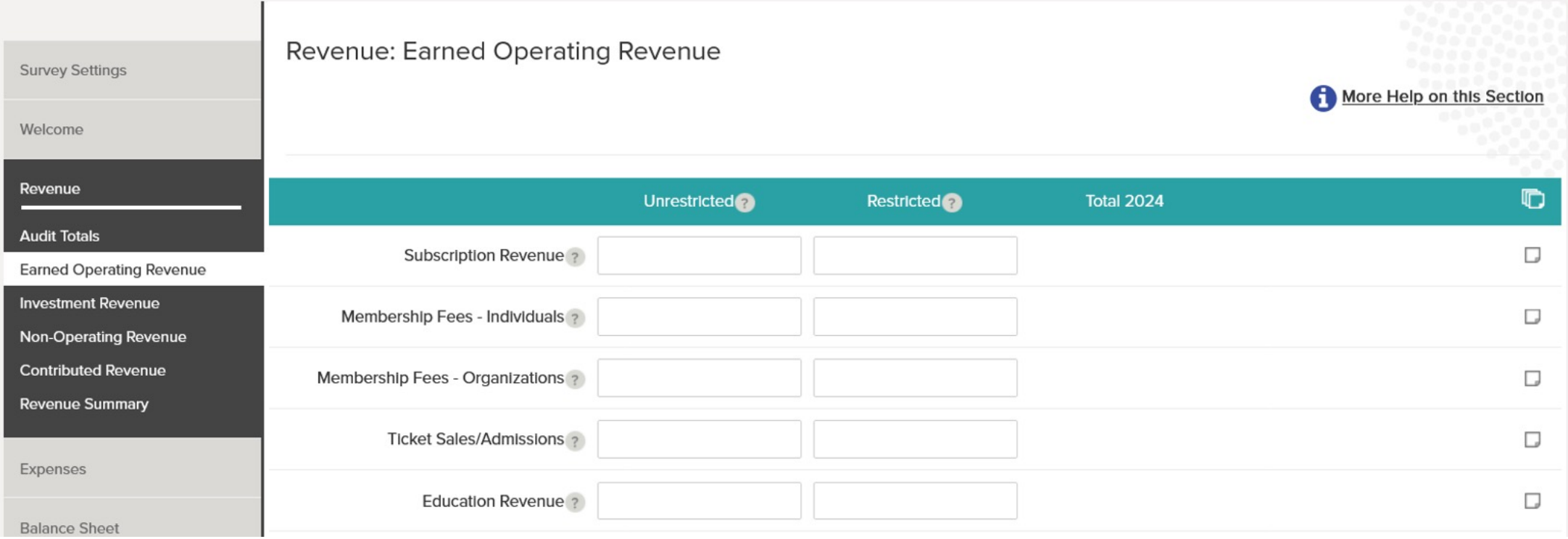

REVENUE – EARNED OPERATING REVENUE

The second subsection of the Revenue section is Earned Revenue. Earned operating revenue is any income the organization earned by providing goods or services. In this subsection, we ask you to breakout your earned operating revenue into more specific line items, such as ticket sales, rental revenue, and membership fees.

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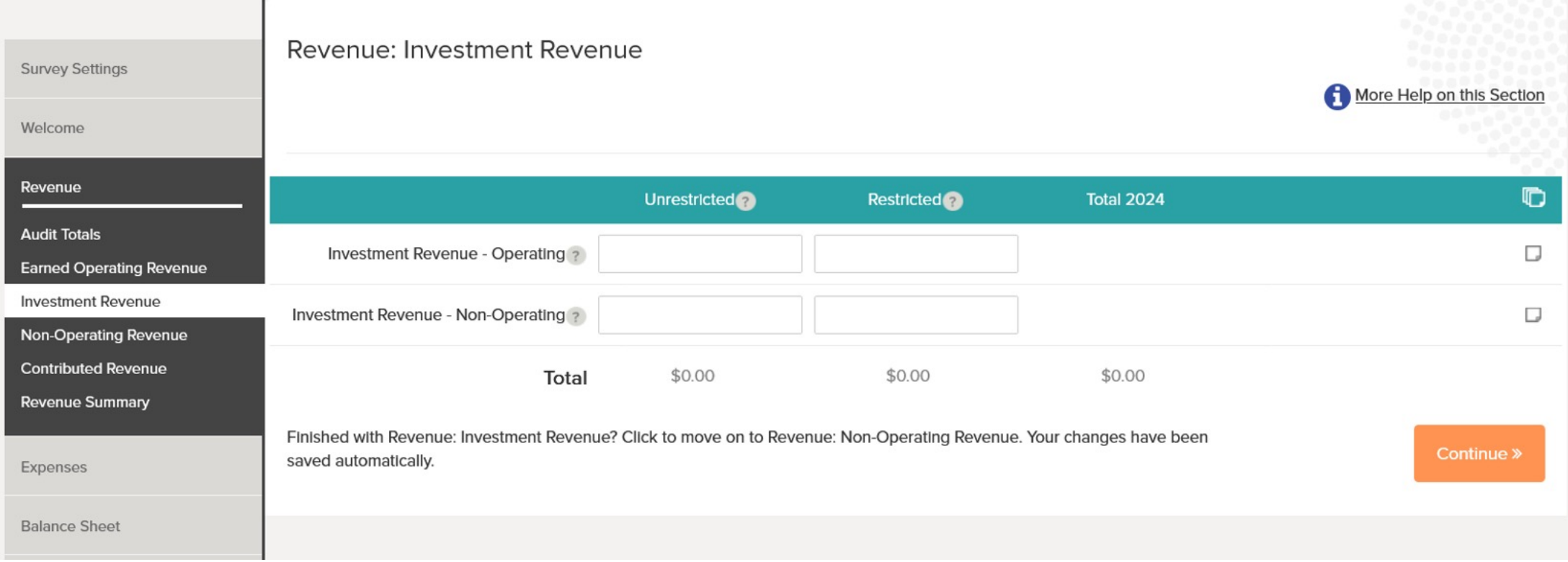

REVENUE – INVESTMENT REVENUE

Investment Revenue includes interest and other earnings on any investments such as bank accounts, stocks, bonds, mutual funds, or any other investments. Non-operating revenue will only appear if you state that you have non-operating revenue when customizing the survey. This can include any unusual or one-time income that falls outside of the core business and programs (e.g., contributions to a capital campaign or a large bequest).

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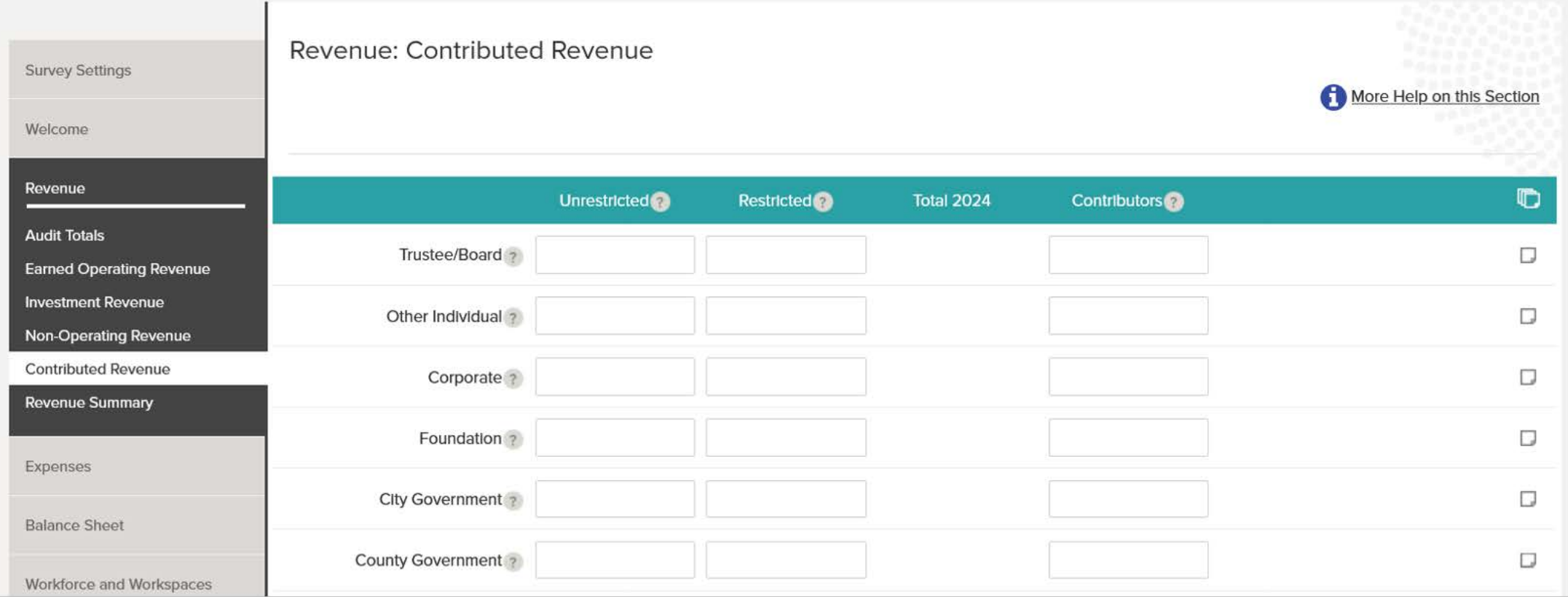

REVENUE – CONTRIBUTED REVENUE

All organizations will be asked to submit information regarding contributed revenue, but if you indicated that the organization has restricted contributions during the setup, you will see columns for unrestricted and restricted contributed revenue as well as a column for the number of contributors.

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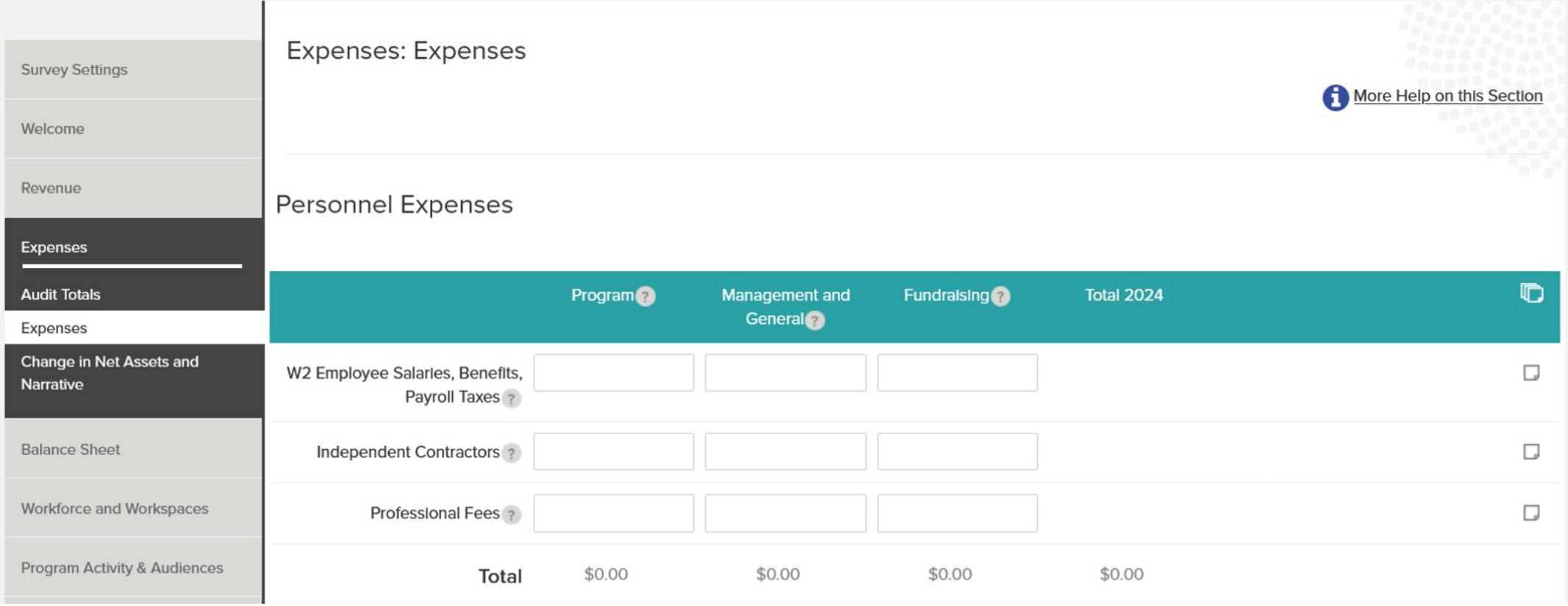

EXPENSES – PERSONNEL EXPENSES

Expenses are subdivided into personnel and non-personnel expenses. Program, Management and General, and Fundraising fall under personnel expenses.

If the organization has an annual budget under $50,000, you will only have one column in the expenses section.

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Breakout Questions

An additional breakout question asks for the amount paid to visual and performing artists (i.e. an itemized calculation of the total personnel expenses reported above).

In the expenses section, we also have a breakout question that asks organizations to report the portion of its expenses associated with Marketing. This data allows us to provide insights into marketing activities across the sector. We have also added a question about digital program expenses. This data will help us to understand the costs associated with the shift to digital programming that many organizations experienced in 2020. This is an optional question.

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Visual and 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 this section. This is required, but you can enter a zero.

Marketing Expenses*

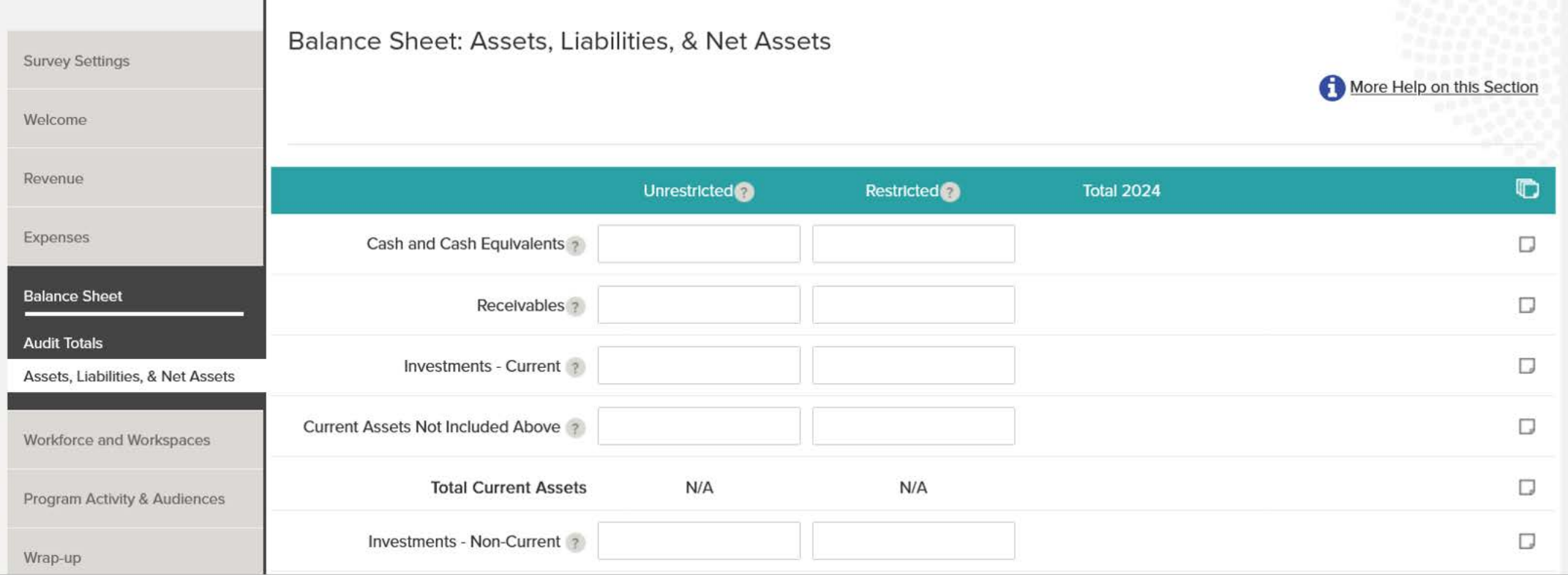
Of your organization's total operating expenses, how much was spent on marketing personnel and non-personnel expenses? (Required)

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 this section. This is required, but you can enter a zero.

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 this section. This is required, but you can enter a zero.



BALANCE SHEET – ASSETS, LIABILITIES, & NET ASSETS

- Audited organizations: Complete unrestricted and restricted columns
- Unaudited organizations: Complete a single-column balance sheet
- Fiscally sponsored organizations: Balance sheet is optional
- Small organizations: Balance sheet will not appear

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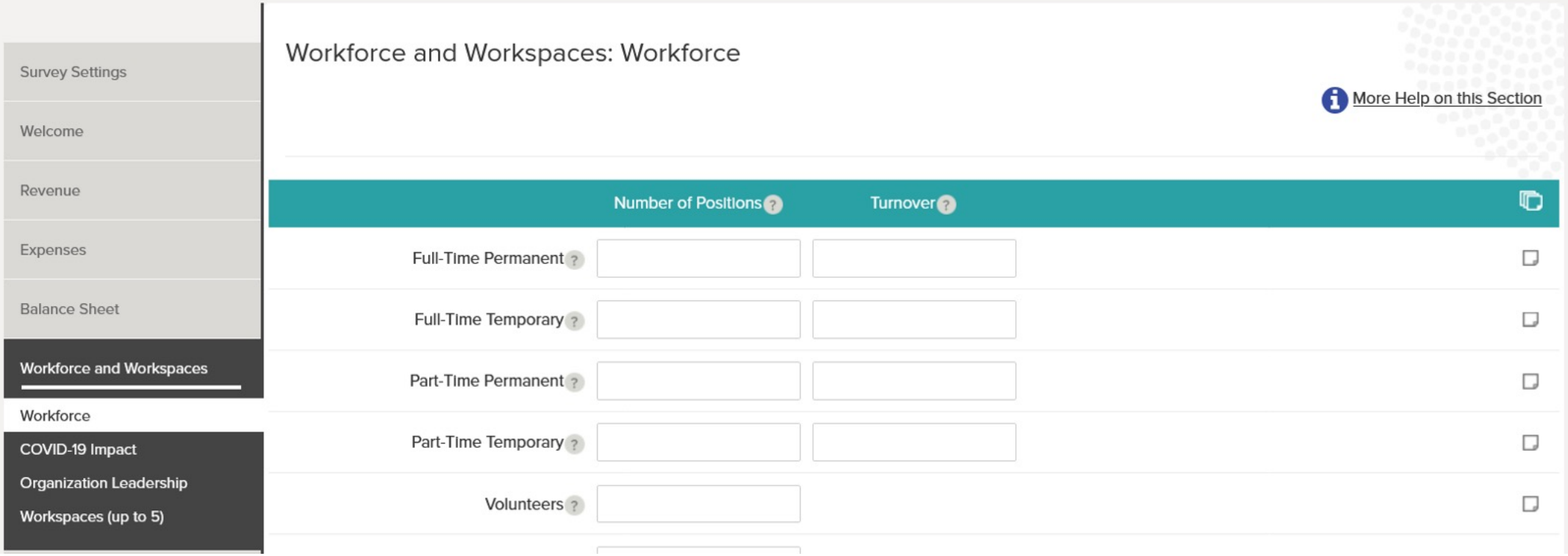
Workforce & Workspaces Section

This section focuses on your workforce, leadership structure, and locations where your organization does its programmatic and administrative work.



WORKFORCE AND WORKSPACES – WORKFORCE

This section has several sub-sections for you to fill out, including Workforce for information about the number of full-time and part-time staff, independent contractors, and volunteers who work for the organization.

There is also a turnover column to report the number of individuals who left their positions within each fiscal year.

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Defining Employee Turnover

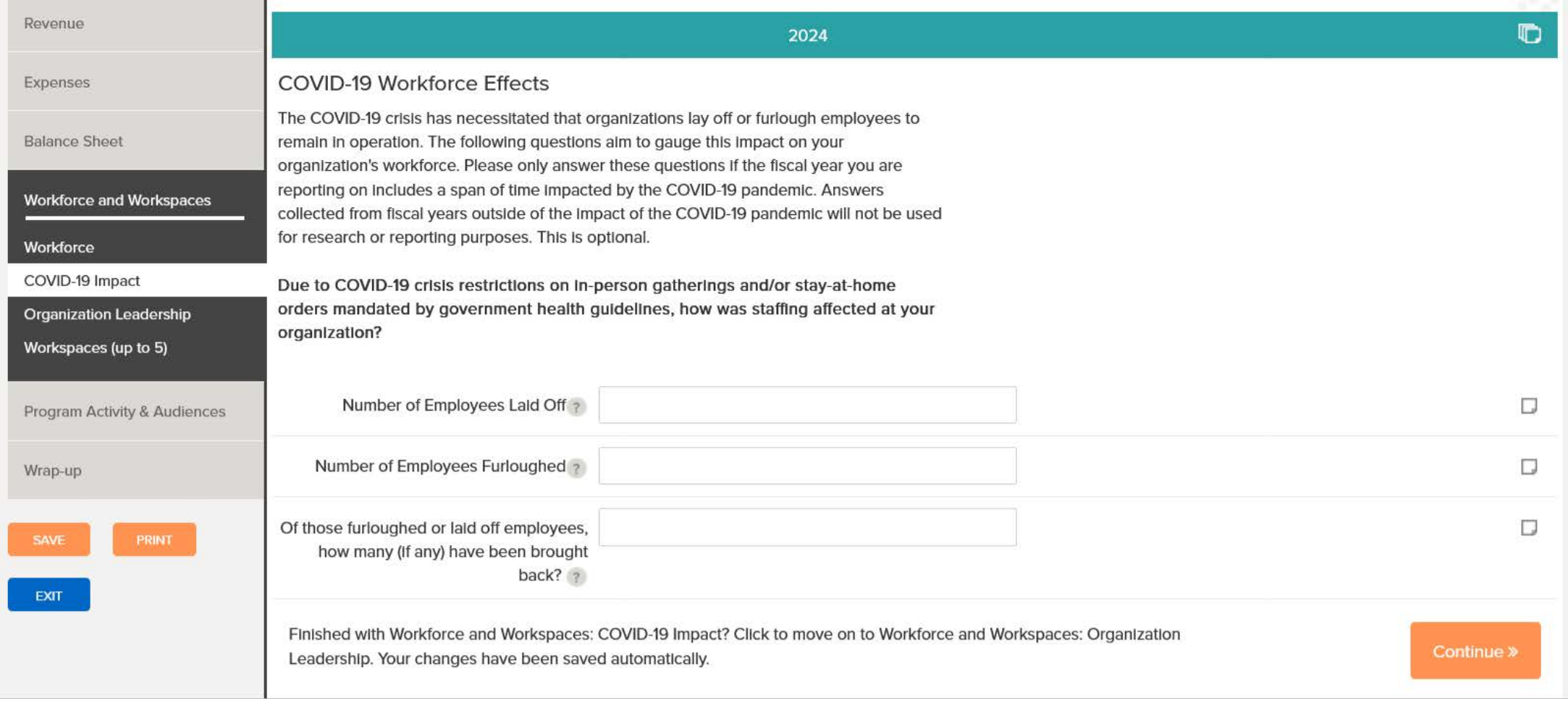
Turnover is defined as the number of permanent employees who resigned, retired, or were terminated.

Include:

- ✓ Resignations
- ✓ Retirements
- ✓ Employment terminations
- ✓ Employment layoffs

Do not include:

- ✗ Internships
- ✗ Fellowships
- ✗ Temporary positions



WORKFORCE AND WORKSPACES – COVID-19 IMPACT

Next there is a COVID-19 impact section. These questions ask you to quantify the effects of the COVID-19 crisis on your workforce.

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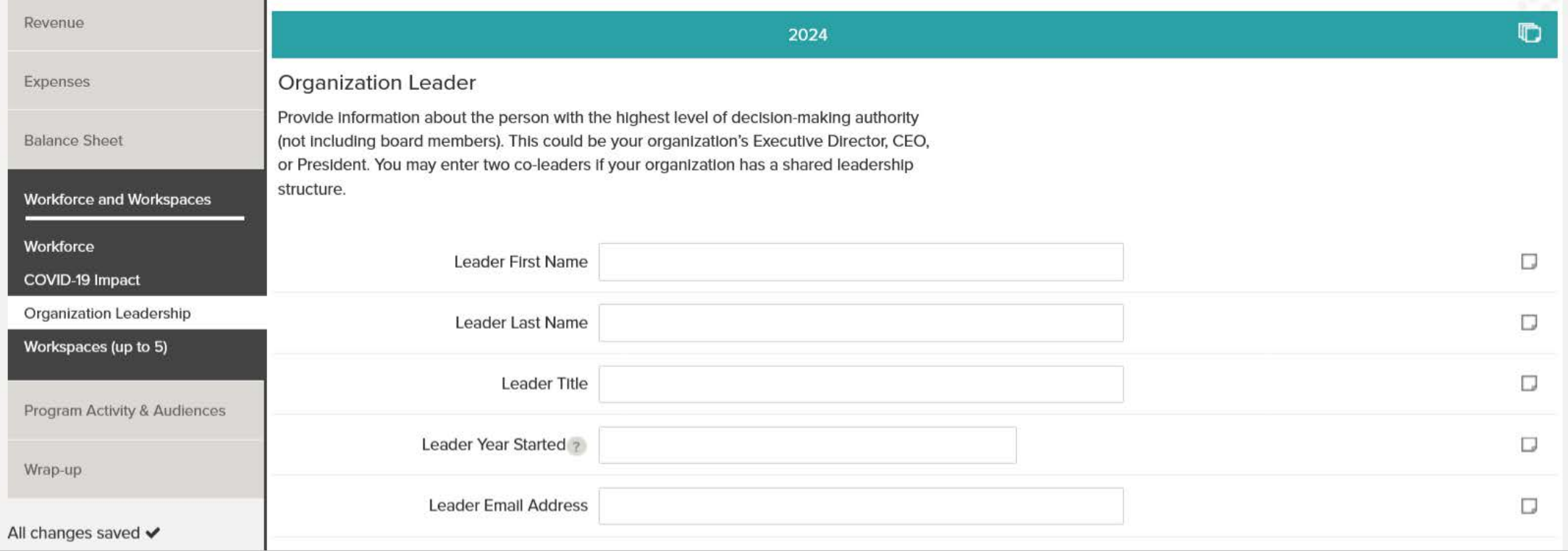

WORKFORCE AND WORKSPACES – ORG LEADER

In the next subsection we ask about your organization's leadership. Here we are asking for information on whoever has the highest decision-making authority at your organization. We ask for some basic information about your leader, as well as the year they started. If you have a shared leadership structure where two people share equal decision-making authority, you can enter two co-leaders.

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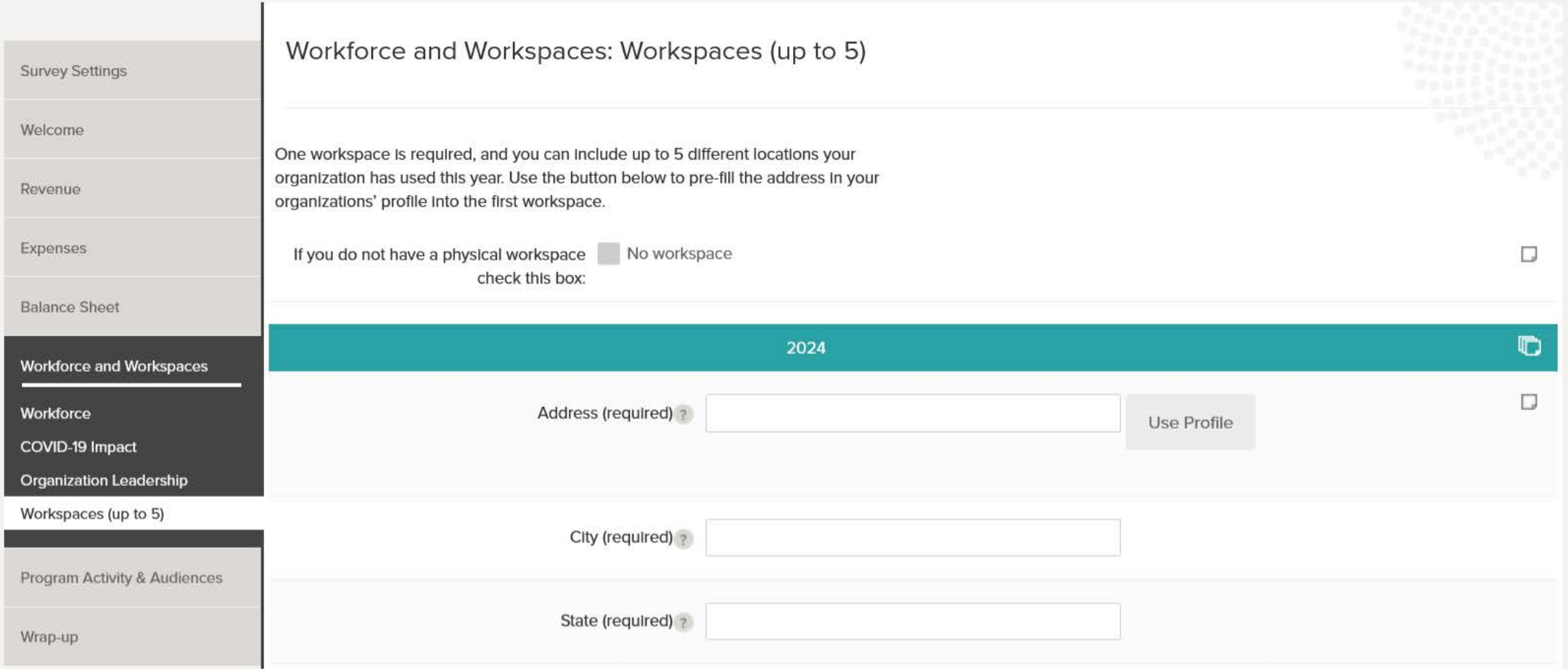

WORKFORCE AND WORKSPACES – WORKSPACES

You can enter up to five workspaces here. If you do not have a physical workspace, you can indicate that and skip this section.

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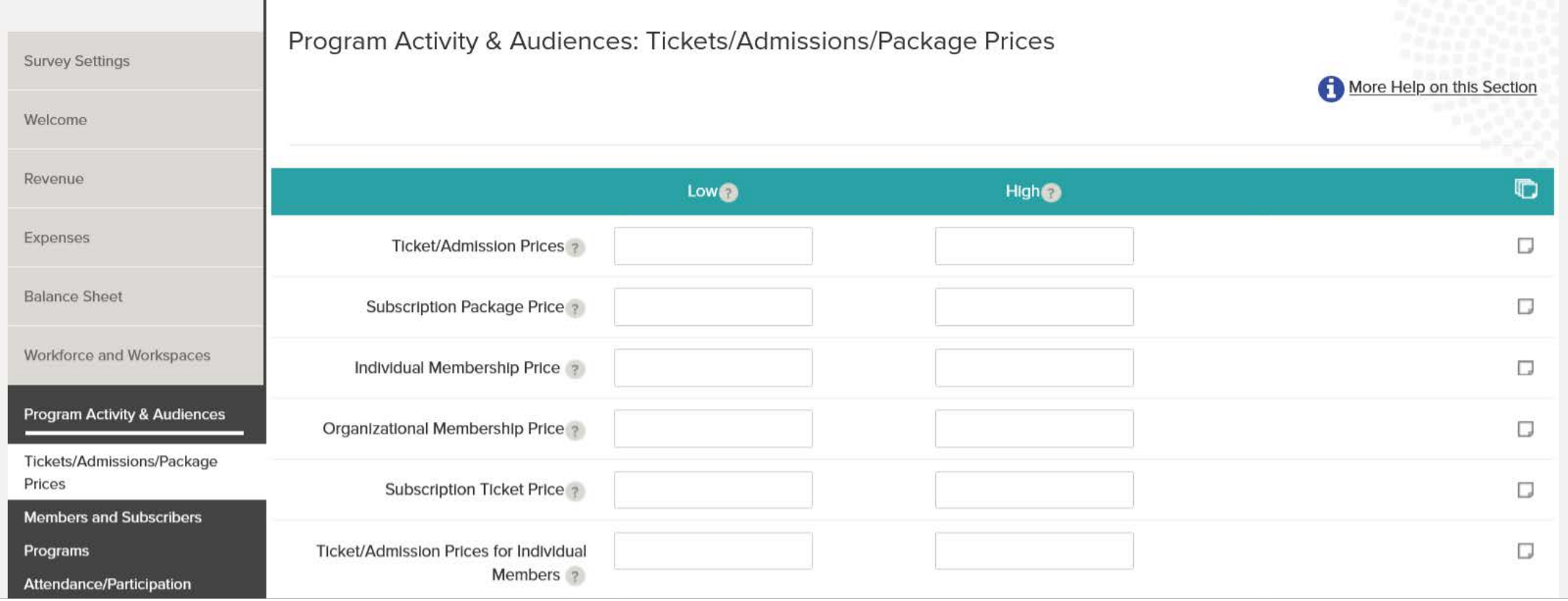
Program Activity & Audiences

Share the number of programs and types of programs your organization held during the fiscal year. You'll also see questions about admissions, membership programs, and digital participation.



PROGRAM ACTIVITY AND AUDIENCES – TICKETS/ADMISSION/PACKAGE PRICING

Enter the lowest and highest prices offered for each line item. Free is not considered a price point, so $0 should not be entered as a low price. You will be able to account for free programming under the Attendance/Participation section.

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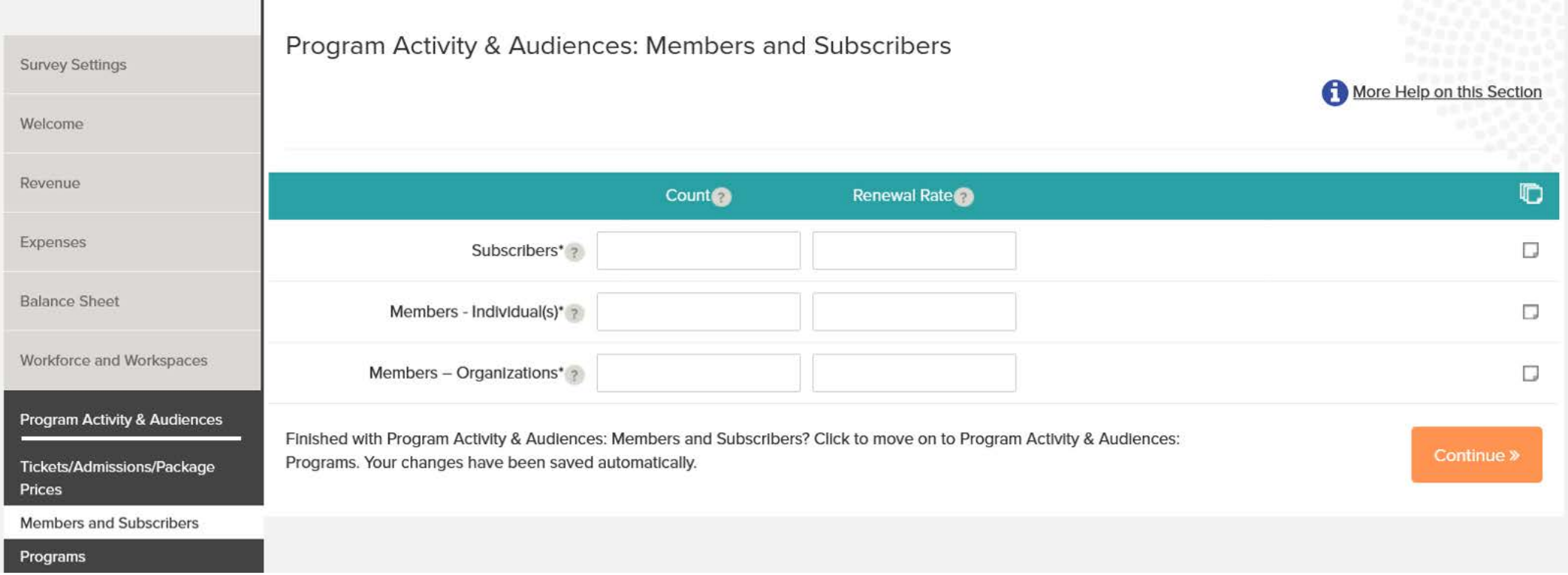

PROGRAM ACTIVITY AND AUDIENCES – MEMBERSHIPS AND SUBSCRIBERS

This section includes the total count of members and subscribers during the year, as well as the percentage of renewals from last year. Renewal rates are optional.

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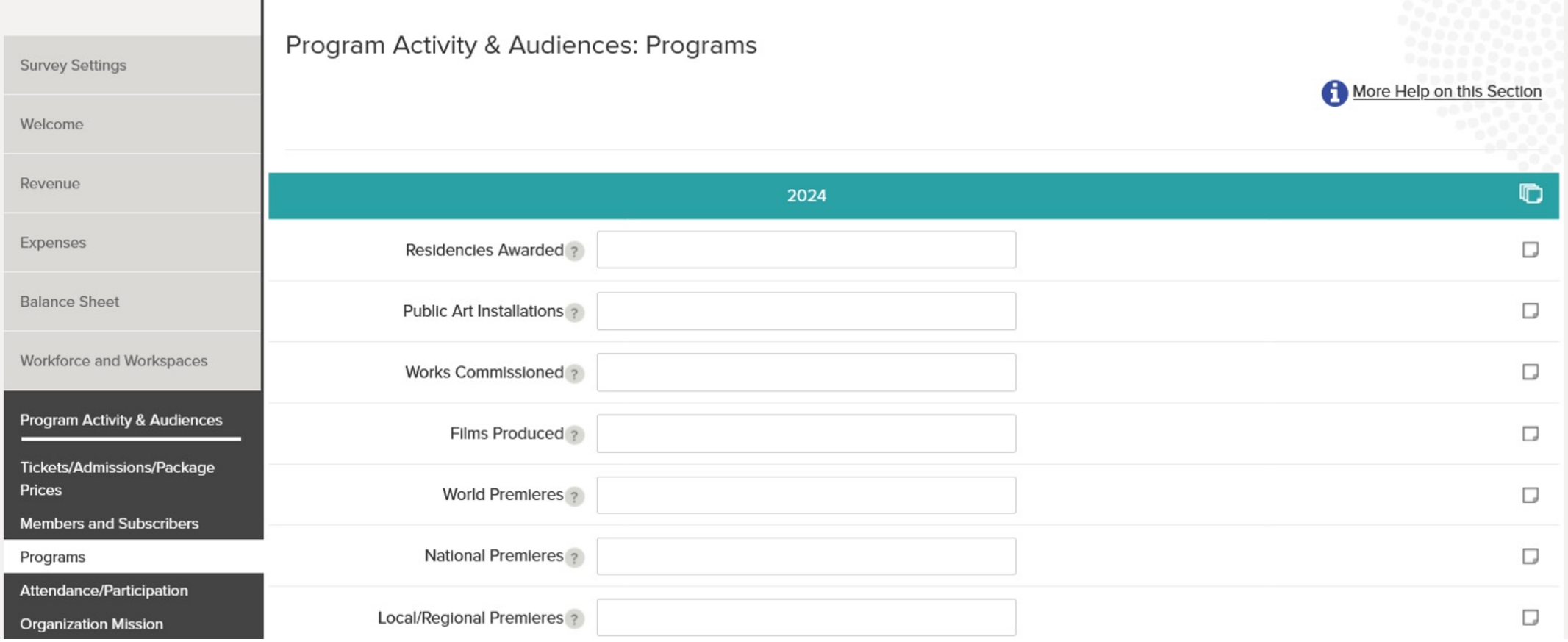

PROGRAM ACTIVITY AND AUDIENCES – PROGRAMS

Enter the number of programs held for each type. Any line items that are not applicable to the organization can be left blank.

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	In Person/Physical Programs		Digital Programs		
	Distinct Offerings	# of Times Offered	Distinct Live-Streamed	# of Times Live-Streamed	On-demand Offerings
Productions (Self-produced)	2	6	1	3	2
Productions (Presented)					
Broadcast Productions					
Classes/Workshops (Outside of Schools)					
Classes/Assemblies/Other Programs in Schools					

PROGRAM ACTIVITY AND AUDIENCES – IN PERSON PROGRAMS

Enter both the number of distinct programs, and the number of times each program was offered. For example, if an organization had two shows and offered them both at three different times, they would report two distinct programs, and six times offered.

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	In Person/Physical Programs		Digital Programs		
	Distinct Offerings	# of Times Offered	Distinct Live-Streamed	# of Times Live-Streamed	On-demand Offerings
Productions (Self-produced)	2	6	1	3	2
Productions (Presented)					
Broadcast Productions					
Classes/Workshops (Outside of Schools)					
Classes/Assemblies/Other Programs in Schools					

PROGRAM ACTIVITY AND AUDIENCES – DIGITAL PROGRAMS

Live-streamed refers to programs with a live/real-time performance aspect (e.g., webinars). On-demand programs are pre-recorded and can be watched at any time (e.g., tutorials or behind-the-scenes videos).

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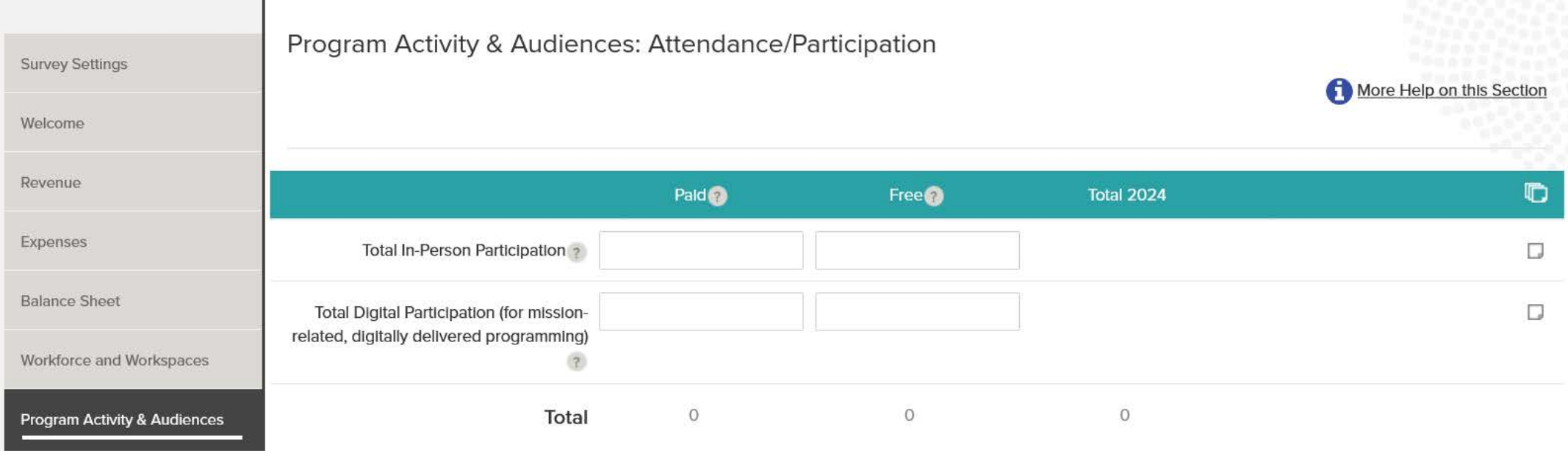
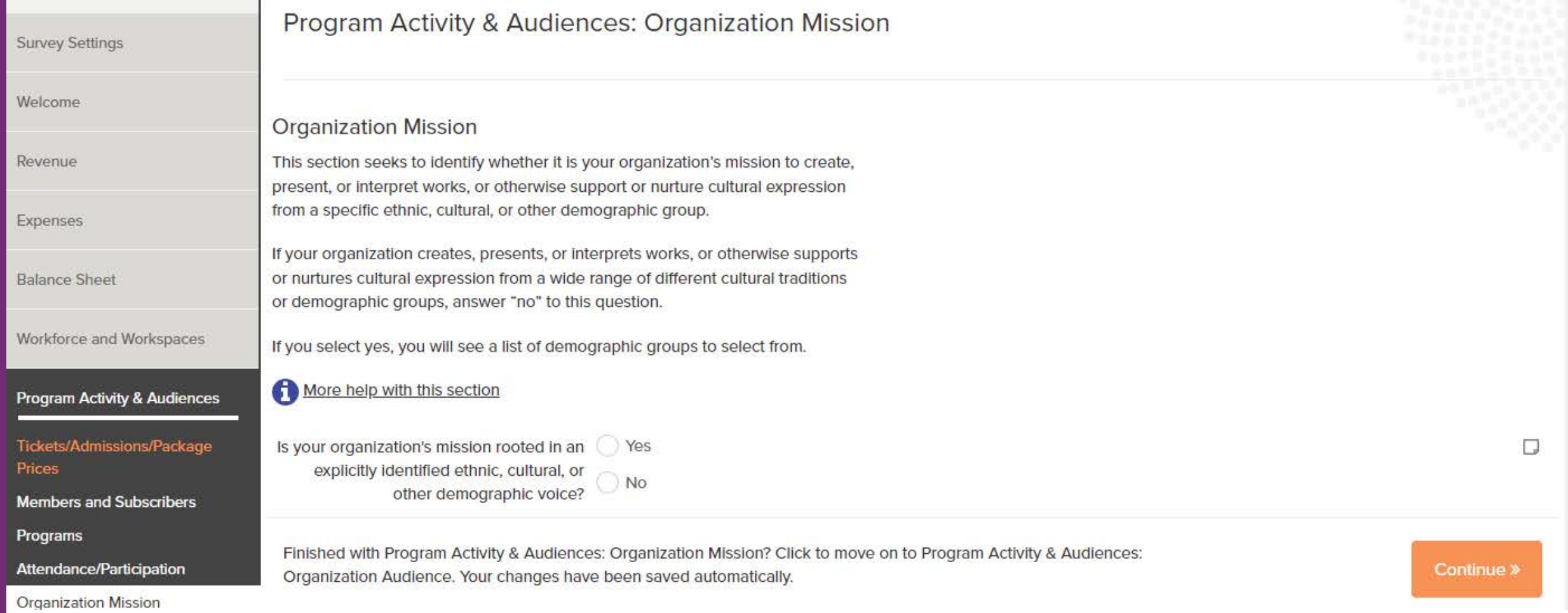


PROGRAM ACTIVITY AND AUDIENCES – ATTENDANCE/PARTICIPATION

Parse attendance numbers by in-person and digital attendance as well as each by paid and free attendance. You will also be asked to breakout the number of attendees to your programs that are under 18 years old.

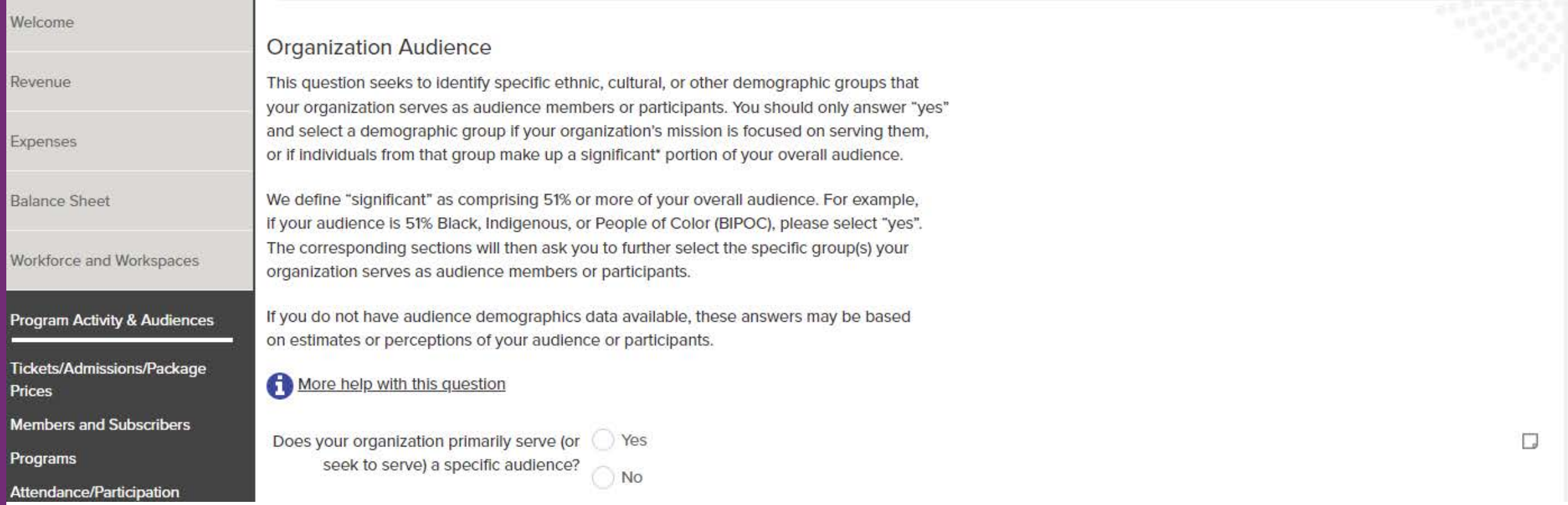
SMU DataArts



PROGRAM ACTIVITY AND AUDIENCES – ORGANIZATION MISSION

Specify whether the organization's mission is rooted in a specific ethnic, cultural, or demographic voice (e.g., African American Art Museum, Gay Men's Chorus).

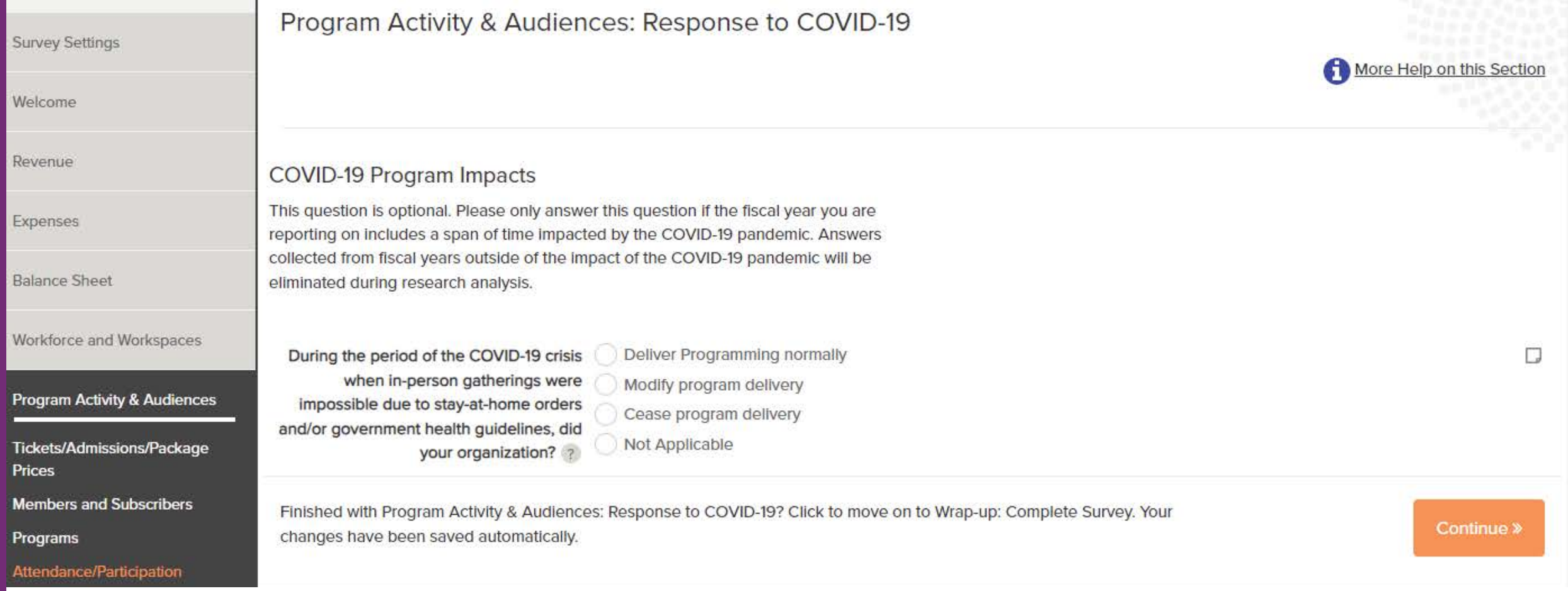
SMU DataArts



PROGRAM ACTIVITY AND AUDIENCES – ORGANIZATION MISSION

Only select 'yes' if serving a specific is the primary mission, or if over 25% of the total participants are from that group. For example, a children's theatre company would answer yes, and select children under 18 as its primary audience.

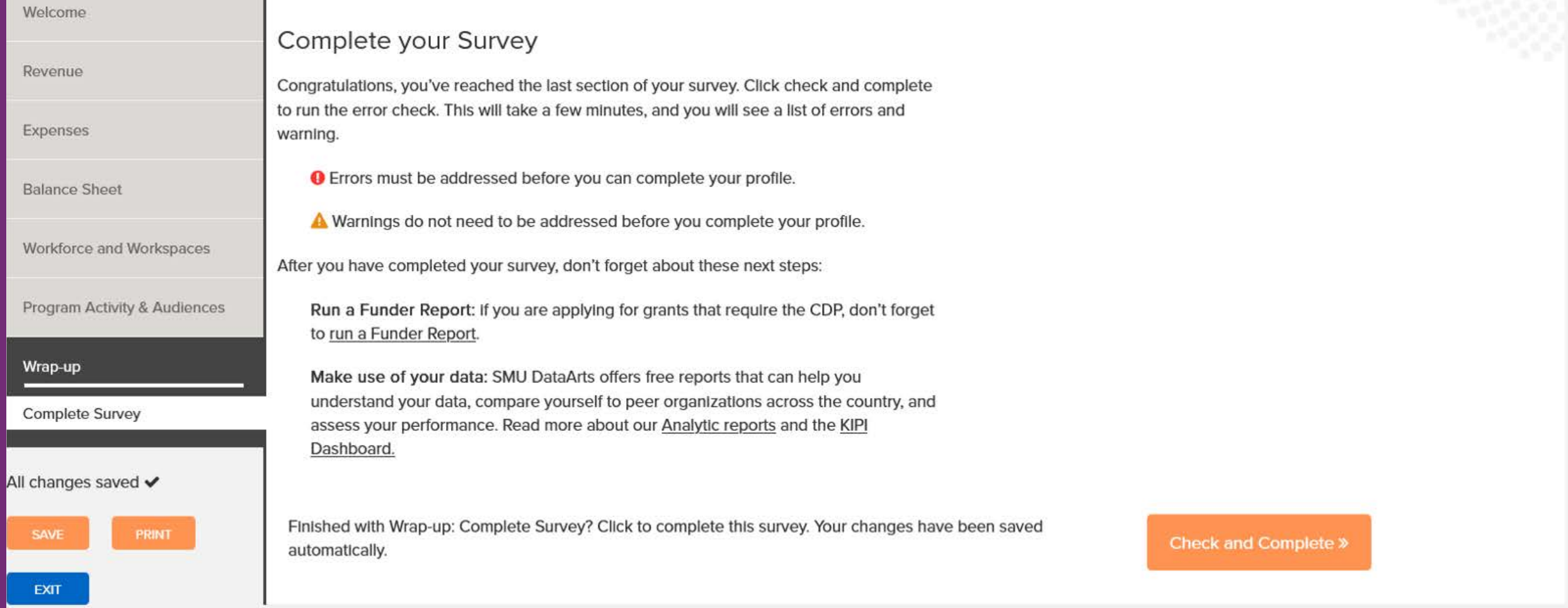
SMU DataArts



PROGRAM ACTIVITY AND AUDIENCES – RESPONSE TO COVID-19

Providing more details about the impact of COVID-19 will provide more comprehensive insights for the organization, for grantmakers, and for the sector.

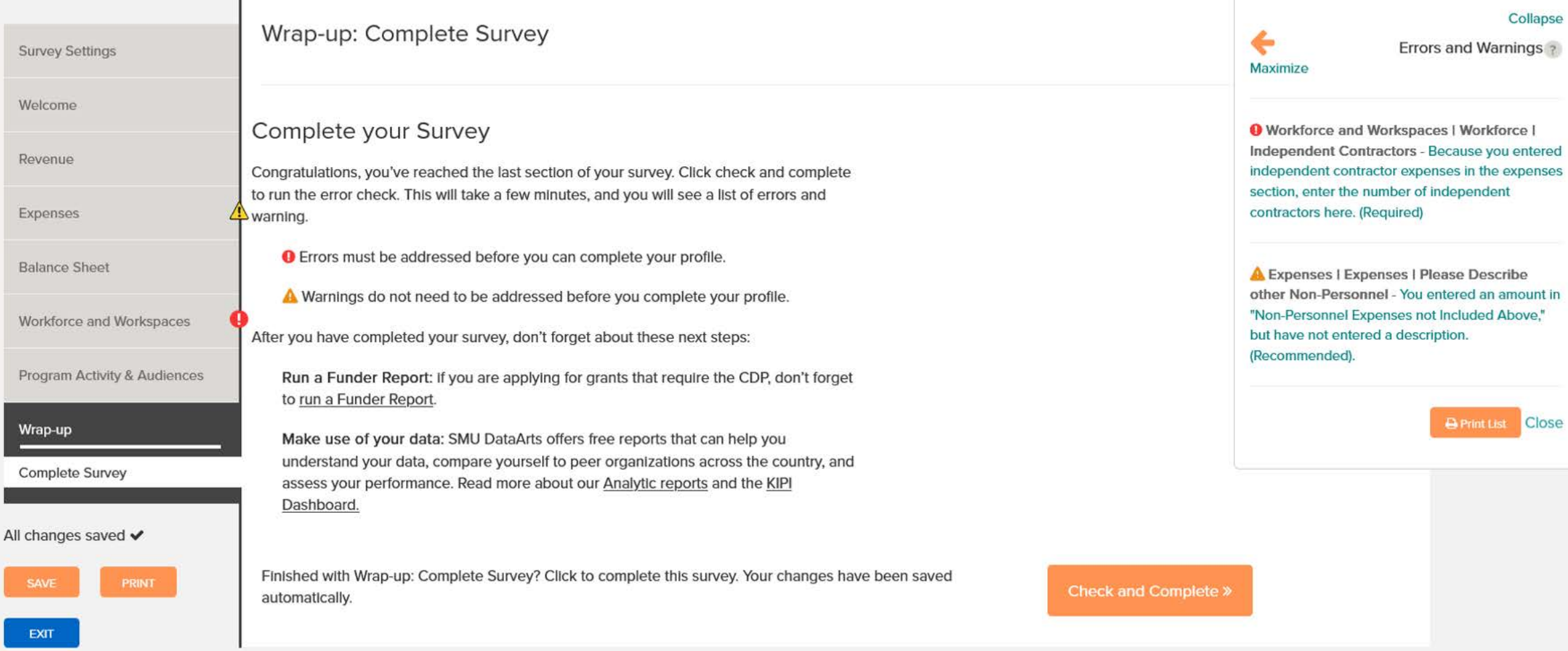
SMU DataArts



WRAP-UP – COMPLETE SURVEY

Error check will review for possible errors and discrepancies and financial information.

SMU DataArts



WRAP-UP – COMPLETE SURVEY

Once the error check is complete, you will see a complete list of all potential issues with links that take you directly to each question.

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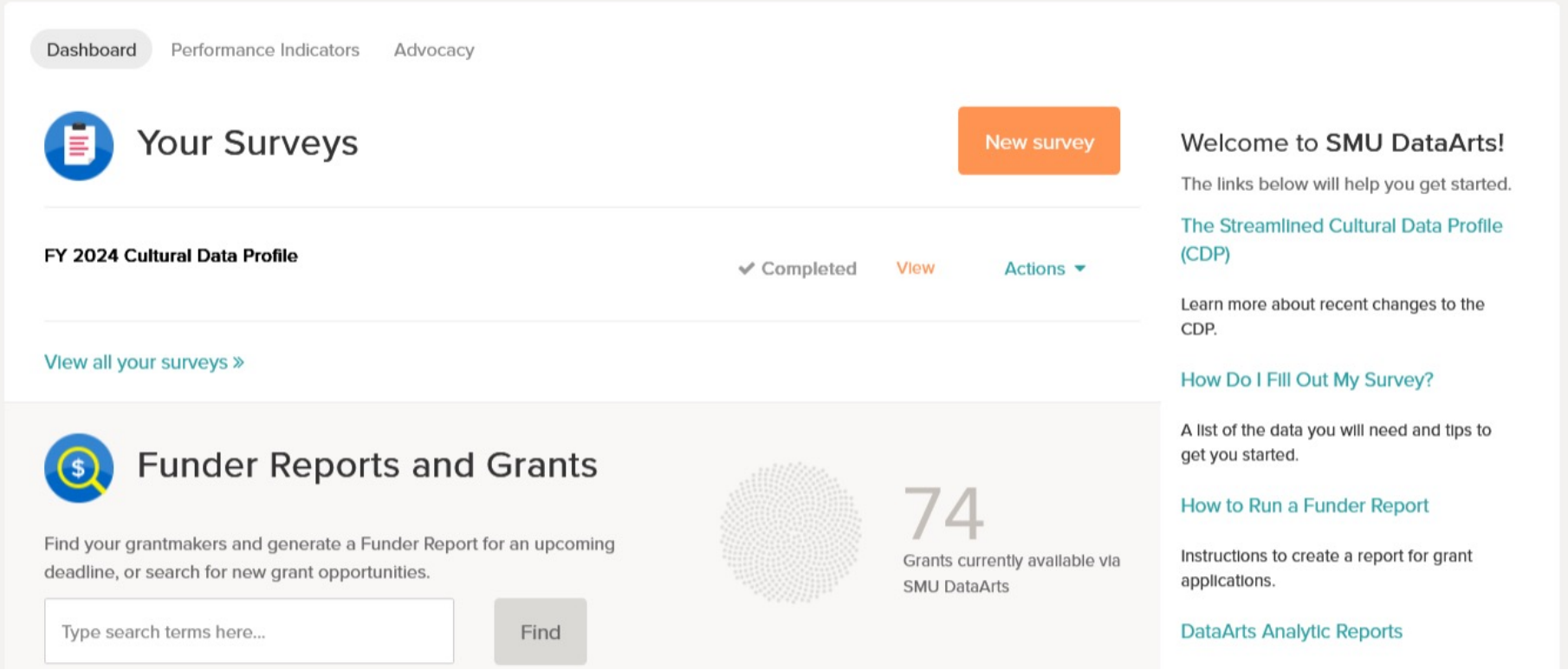

WRAP-UP – COMPLETE SURVEY

Once all errors have been resolved, submit the completed survey. A confirmation of your completed survey will appear with a check mark and 'Completed,' which can be viewed and/or printed at any time.

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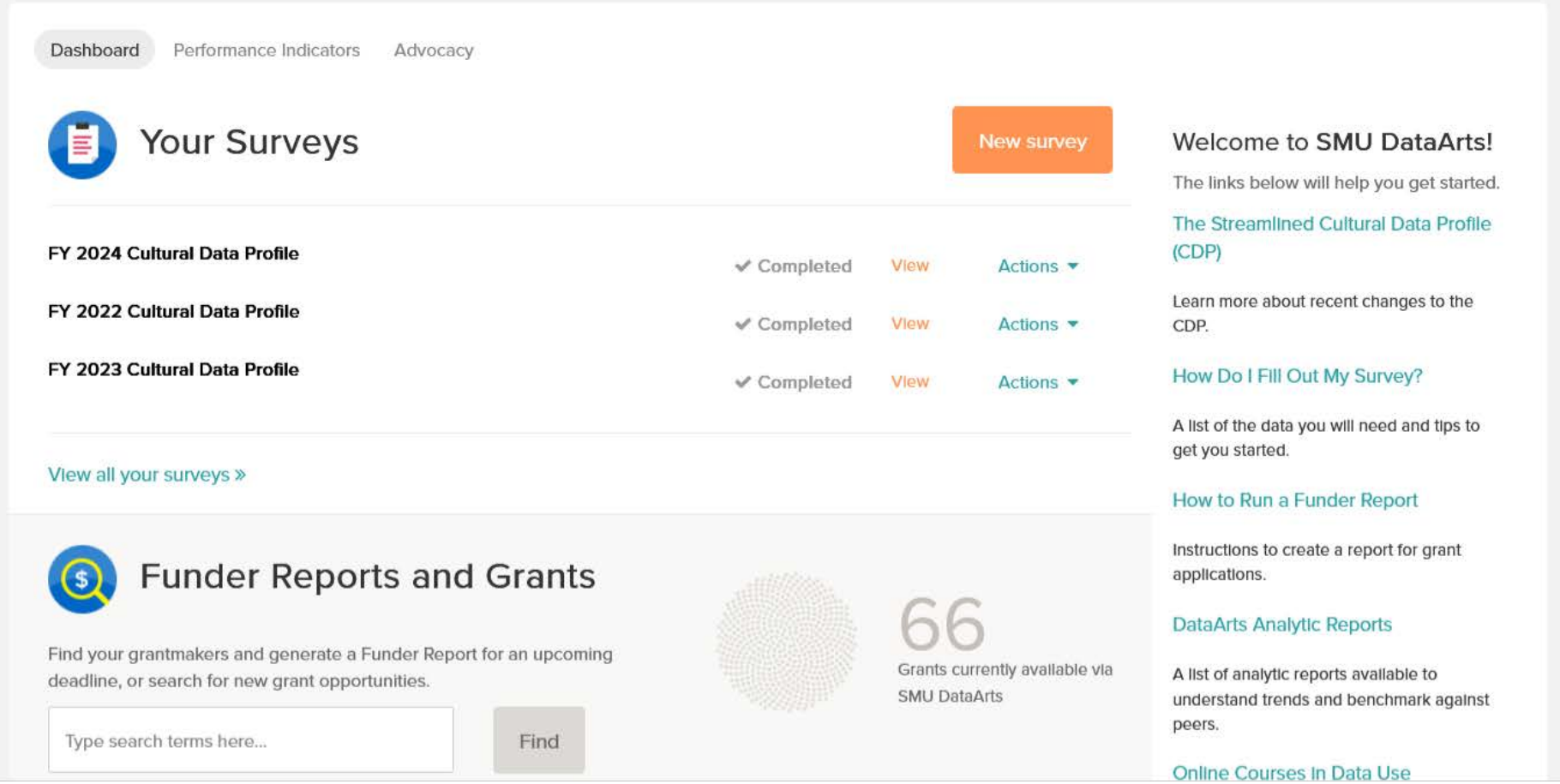
How to Run a Funder Report

A Funder Report uses the data from one or more completed CDP surveys and seamlessly creates a standardized report for you and potential funder(s).



FUNDER REPORT

From the dashboard, run a Funder Report by going to the Funder Report tab, or by searching for the name of the grantmaker you will be applying to in the Funder Reports & Grants search field.

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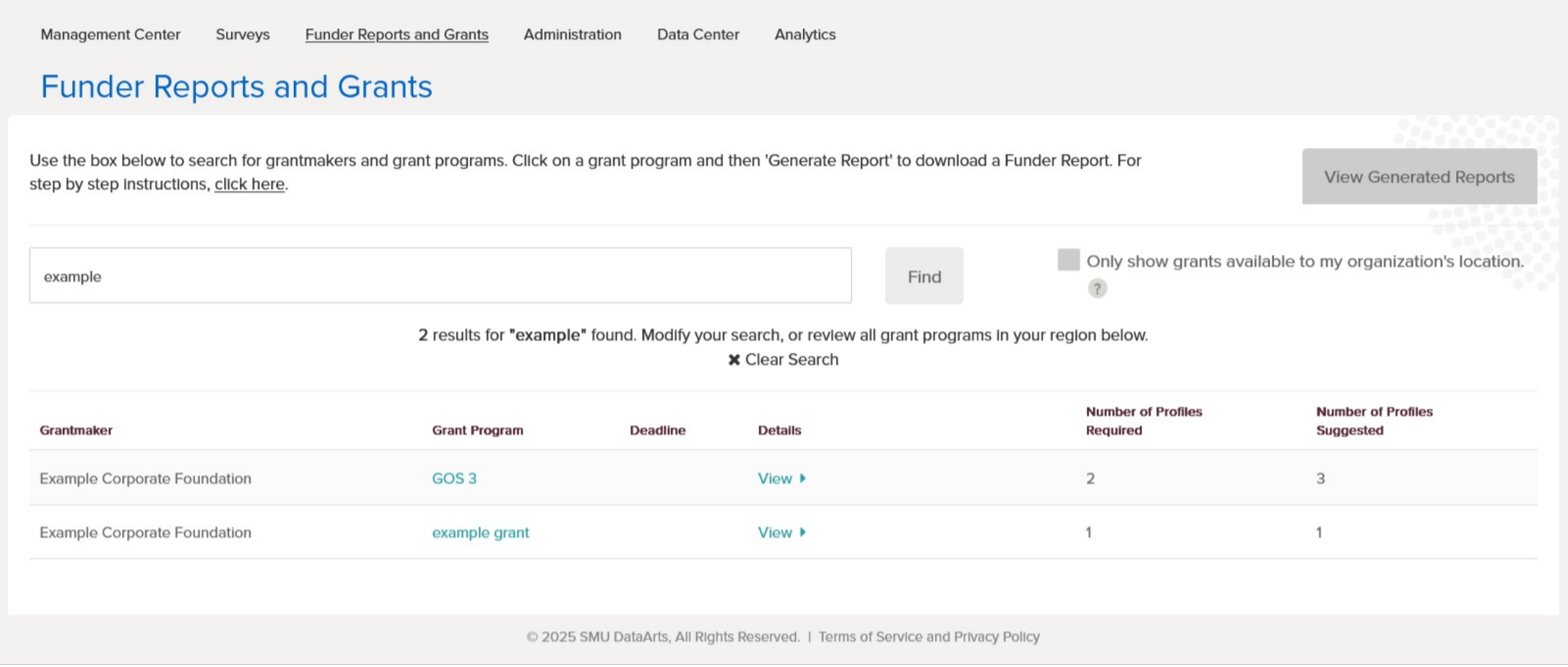
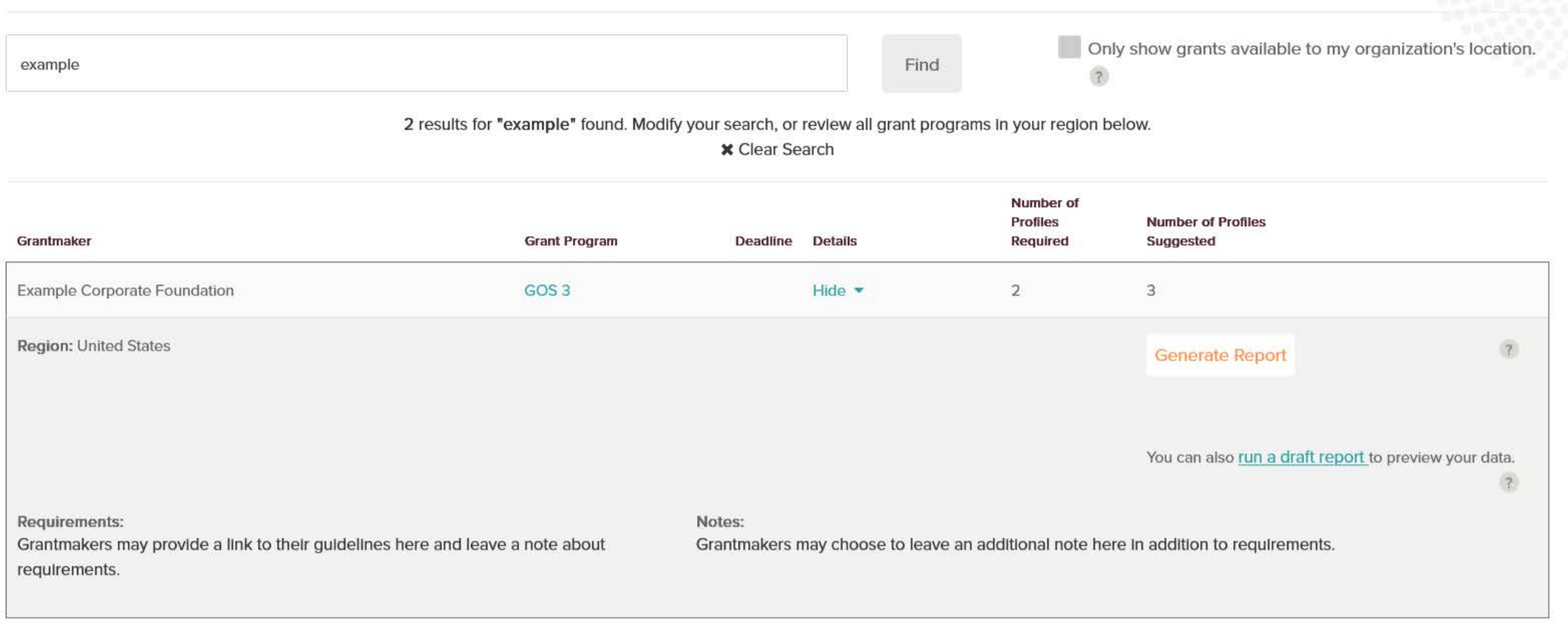


FUNDER REPORT – FIND GRANTS

Example Corporate Foundation is accepting applications for two different grants. Select ‘View’ next to the one you’re applying to for more information.

SMU DataArts



FUNDER REPORT – GENERATE REPORT

The expanded details will provide key requirements and the deadline, if this information has been made available to us. To generate a Funder Report, first run a draft report to review your data before you share it with the grantmaker. Once reviewed, select “Generate Report” to download a copy of the final report and send directly to the grantmaker.

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Pro-Tips

- Consult the grantmaker's guidelines for how they want Funder Reports submitted, as well as any other items for the application (e.g., email, a grants management system, or hard copy).
- Before generating a Funder Report, consider running a draft version to check it for accuracy.
- Always be ready to talk about your data. Before sharing the Funder Report with grantmakers, take a moment to review the report, get an understanding of the data and the story it tells.

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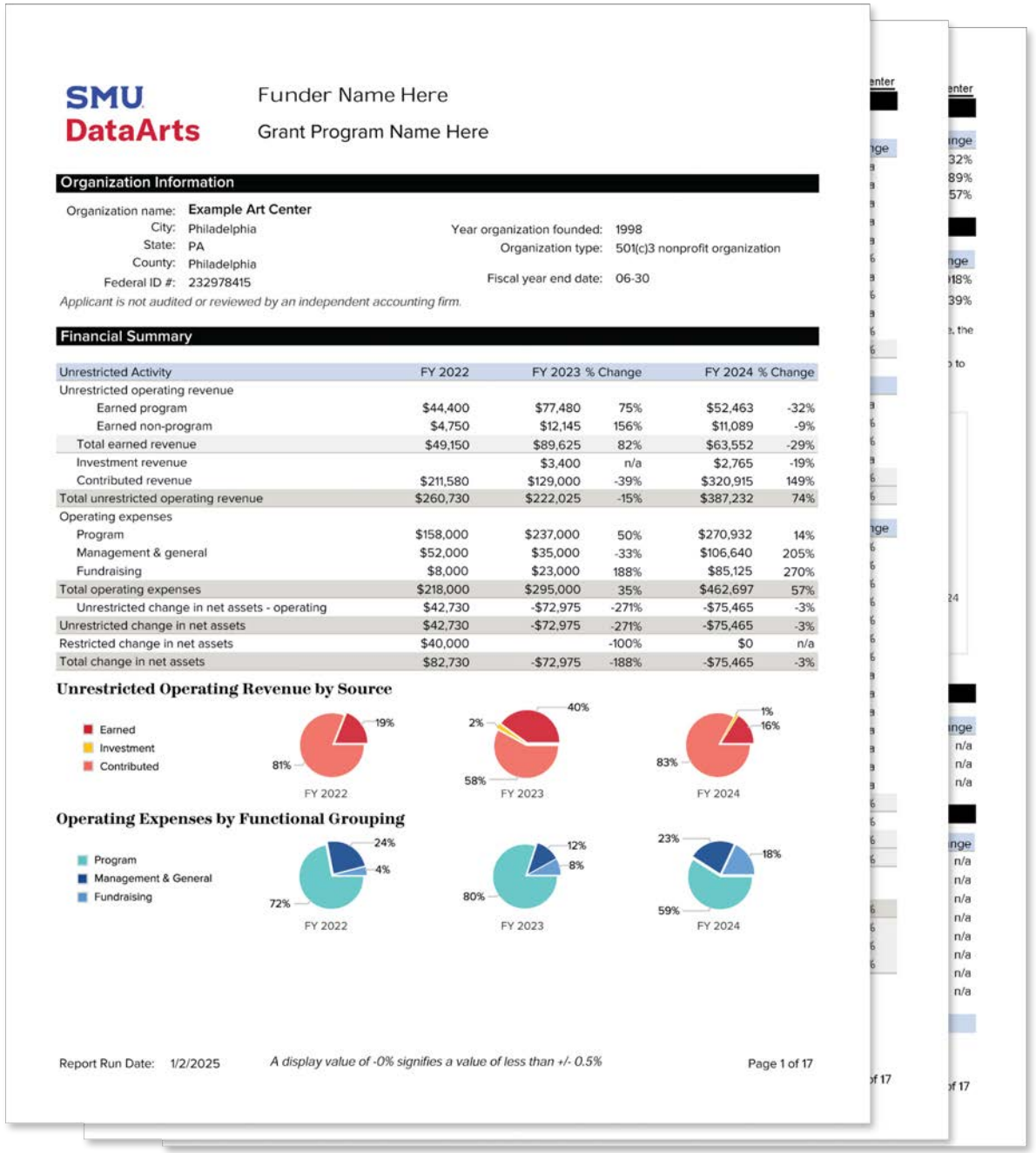

SMU DataArts

Funder Name Here

Grant Program Name Here

Organization Information

Organization name: **Example Art Center**
City: Philadelphia
State: PA
County: Philadelphia
Federal ID #: 232978415

Year organization founded: 1998
Organization type: 501(c)3 nonprofit organization
Fiscal year end date: 06-30

Applicant is not audited or reviewed by an independent accounting firm.

Financial Summary

Unrestricted Activity	FY 2022	FY 2023	% Change	FY 2024	% Change
Unrestricted operating revenue					
Earned program	$44,400	$77,480	75%	$52,463	-32%
Earned non-program	$4,750	$12,145	156%	$11,089	-9%
Total earned revenue	$49,150	$89,625	82%	$63,552	-29%
Investment revenue		$3,400	n/a	$2,765	-19%
Contributed revenue	$211,580	$129,000	-39%	$320,915	149%
Total unrestricted operating revenue	$260,730	$222,025	-15%	$387,232	74%
Operating expenses					
Program	$158,000	$237,000	50%	$270,932	14%
Management & general	$52,000	$35,000	-33%	$106,640	205%
Fundraising	$8,000	$23,000	188%	$85,125	270%
Total operating expenses	$218,000	$295,000	35%	$462,697	57%
Unrestricted change in net assets - operating	$42,730	-$72,975	-271%	-$75,465	-3%
Unrestricted change in net assets	$42,730	-$72,975	-271%	-$75,465	-3%
Restricted change in net assets	$40,000		-100%	$0	n/a
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Unrestricted Operating Revenue by Source

Earned
Investment
Contributed

FY 2022: 19%, 81%
FY 2023: 40%, 2%, 58%
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Operating Expenses by Functional Grouping

Program
Management & General
Fundraising

FY 2022: 24%, 4%, 72%
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Report Run Date: 1/2/2025

A display value of -0% signifies a value of less than +/- 0.5%

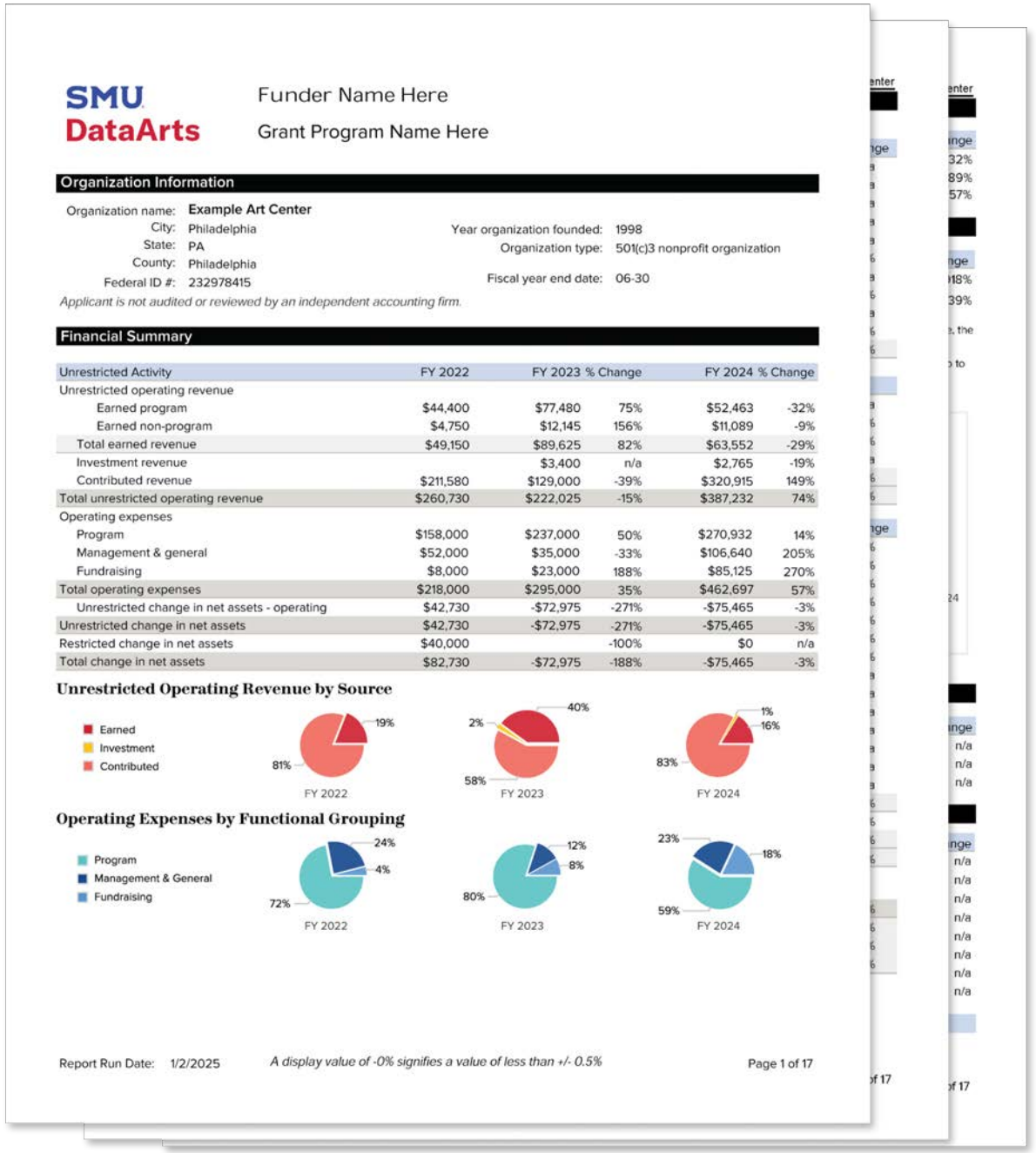
Page 1 of 17

Understanding the Data

While you analyze the data in the Funder Report, be sure to look at the trends and percent change columns. If you notice a substantial percent change and dollar amount on any line, make sure you know why that change happened.

Looking at the trends and percentage changes can also help ensure that you used consistent lines when recording your data from year to year.

smu.edu/dataarts



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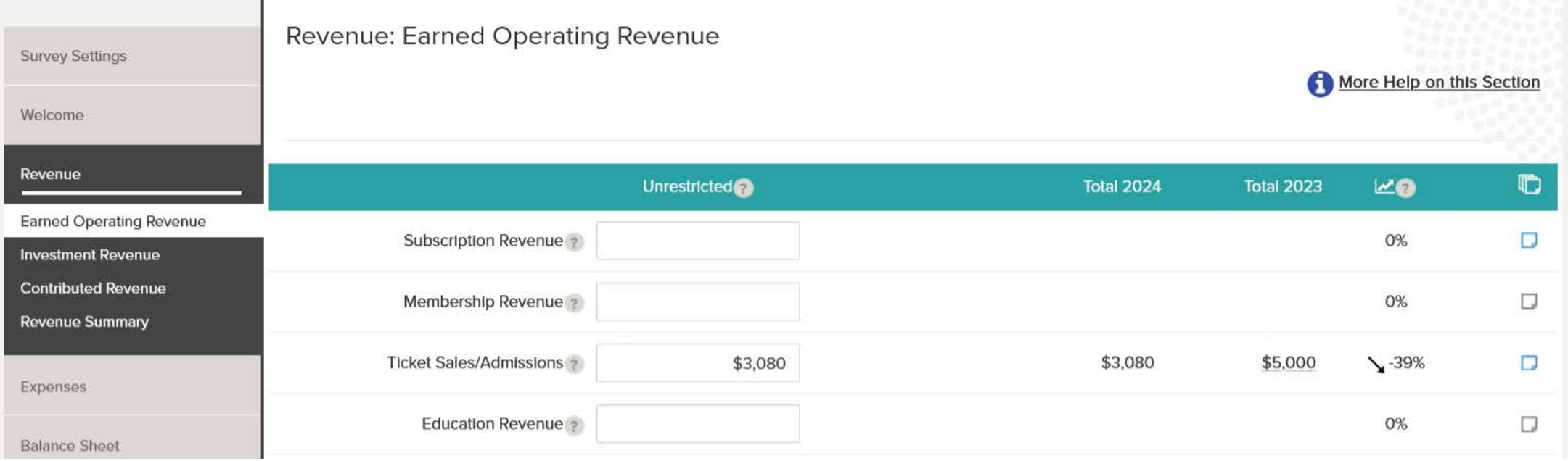

FUNDER REPORT – UNDERSTANDING THE DATA

On the right side of every line in the financial sections of the Data Profile, you'll see a Prior Year Totals column. This column will remind you of which line you used in the previous year and show you the percent change from last entry to this entry. You can see any substantial percentage changes as you are entering data and determine if they reflect accurate changes in your operations or are a result of different categorization in data entry.

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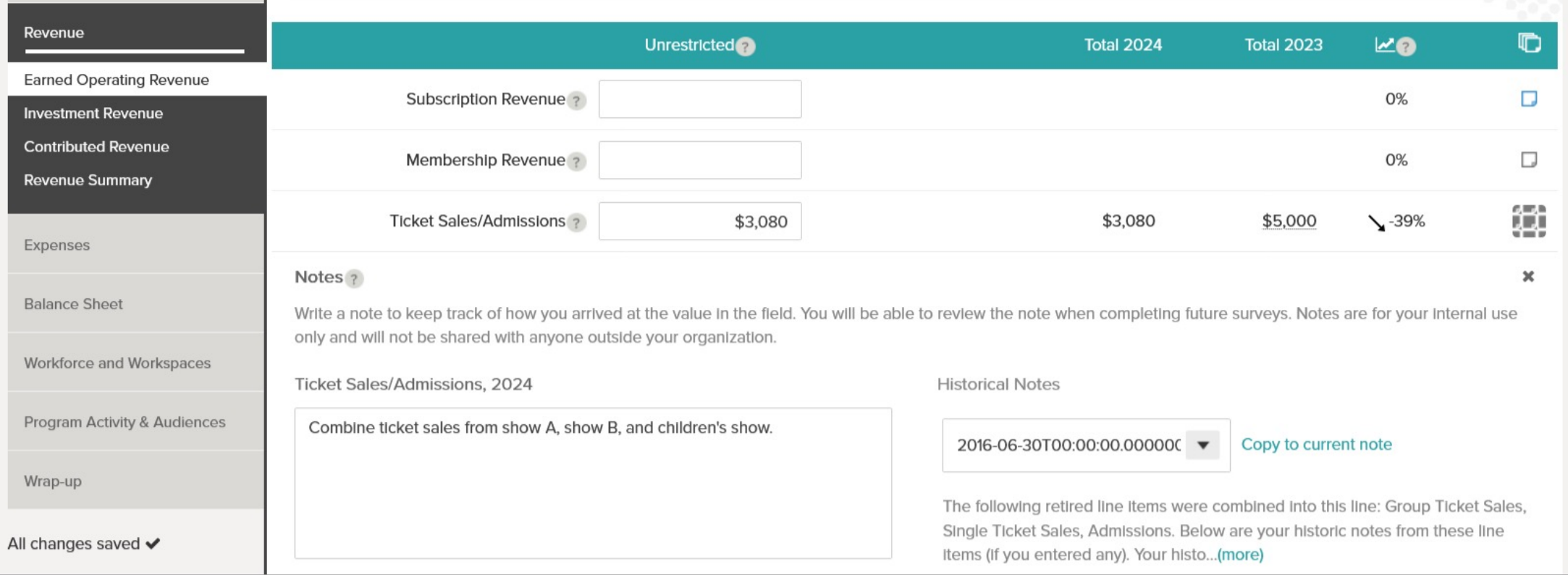

FUNDER REPORT – UNDERSTANDING THE DATA

Leave notes for you and your colleagues by clicking on the note icon located to the right of each line. In the text box, add meaningful notes to reference in the future. Notes are only visible to the organization, not to the funders.

SMU DataArts

Add Context to the Data

If you do have large changes that you would like to explain, or anything else in your data that could use additional context, there is a way to provide annotations to your data is by using the optional narrative sections for your Funder Report. These are brief narrative fields that appear at the end of key sections of the data profile, specifically, in the Revenue, Expenses, Balance Sheet, and Program Activity sections. The narrative fields are intended as annotations and explanations of the data in your report.

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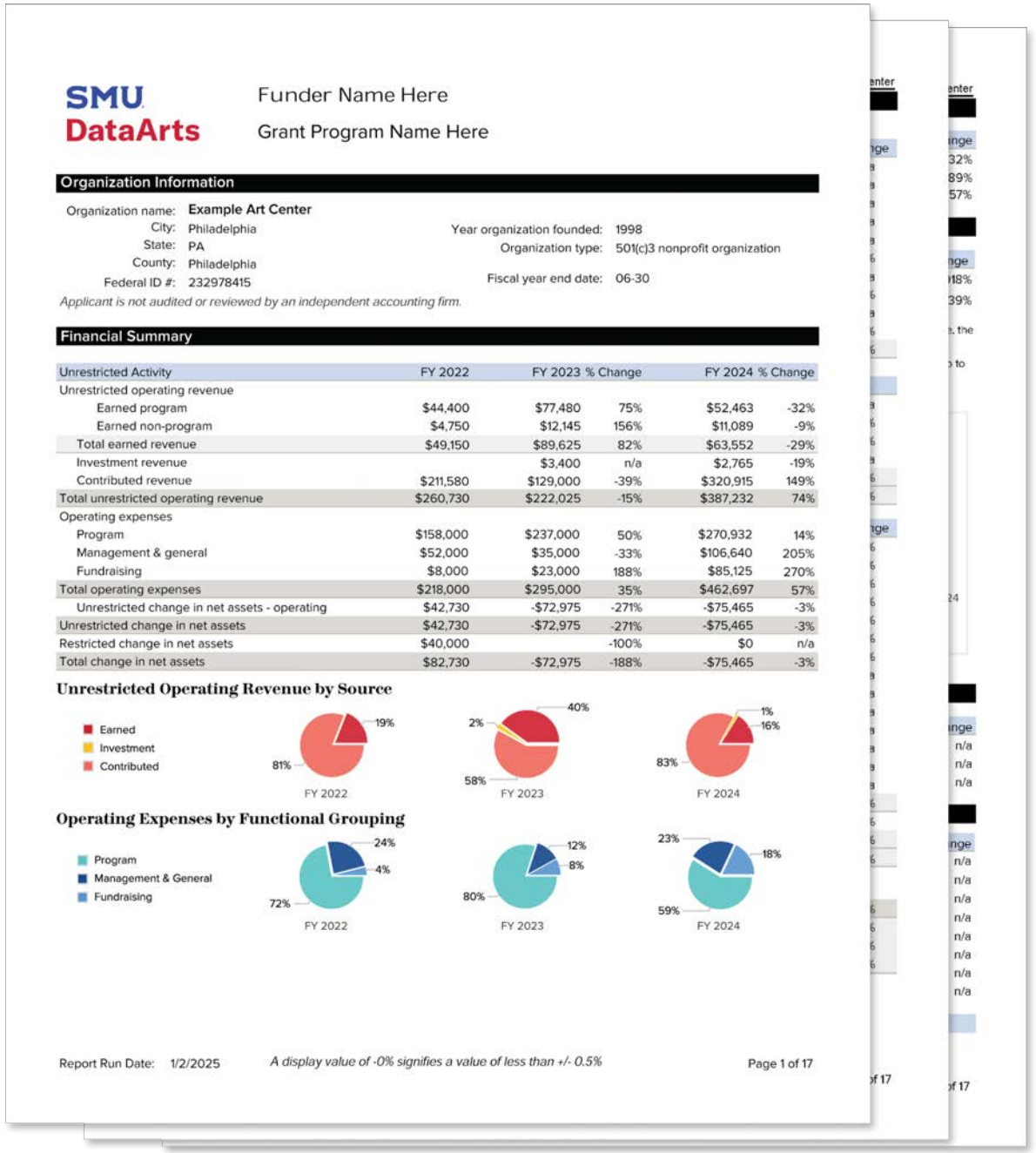

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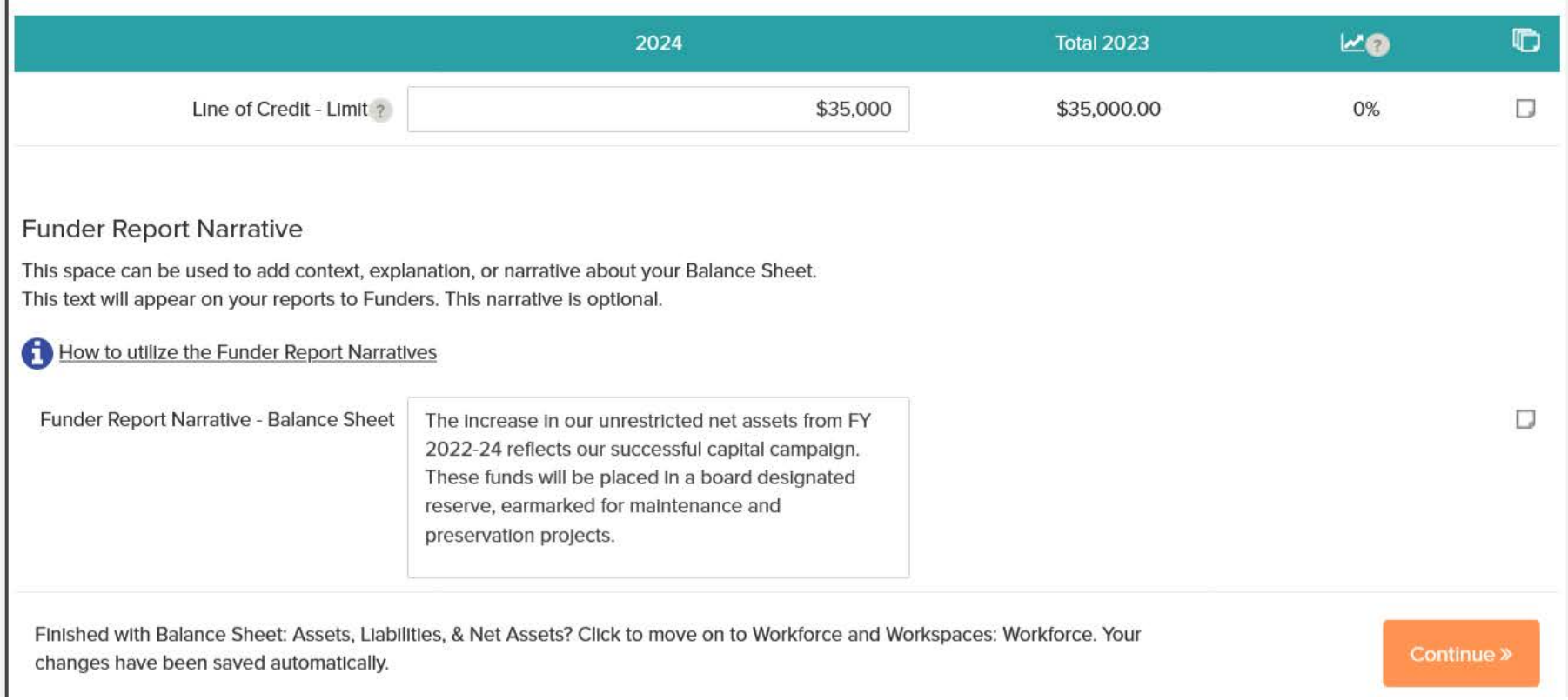


FUNDER REPORT – ADDING CONTEXT TO THE DATA

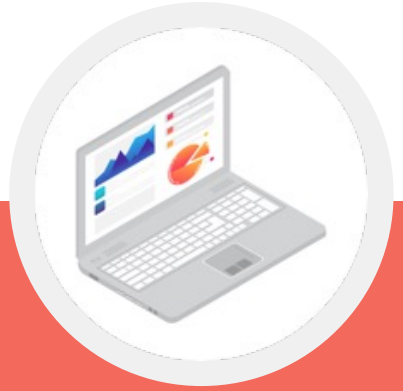
Here's an example of adding context to data for the funder through the Funder Report Narrative text box. In this example, an organization is explaining that a capital campaign led to a large increase in unrestricted net assets.

SMU DataArts

Learn How to Leverage Your Data

SMU DataArts has free tools, resources, and national research to help you understand the context in which your organization does business and plan for the future.

Free Data Analytic Tools for the Arts



Key Intangible Performance Indicators (KIPIs)

The KIPI Dashboard provides your organization's financial and operating performance results relative to organizations like yours nationally so you can assess health and sustainability, and hone strategic decisions.

Analytic Reports

Our easy-to-read Analytic Reports cover a range of topics such as program activity and fundraising to paint a clear picture of both your organization and the sector so you can identify ways to improve your results.

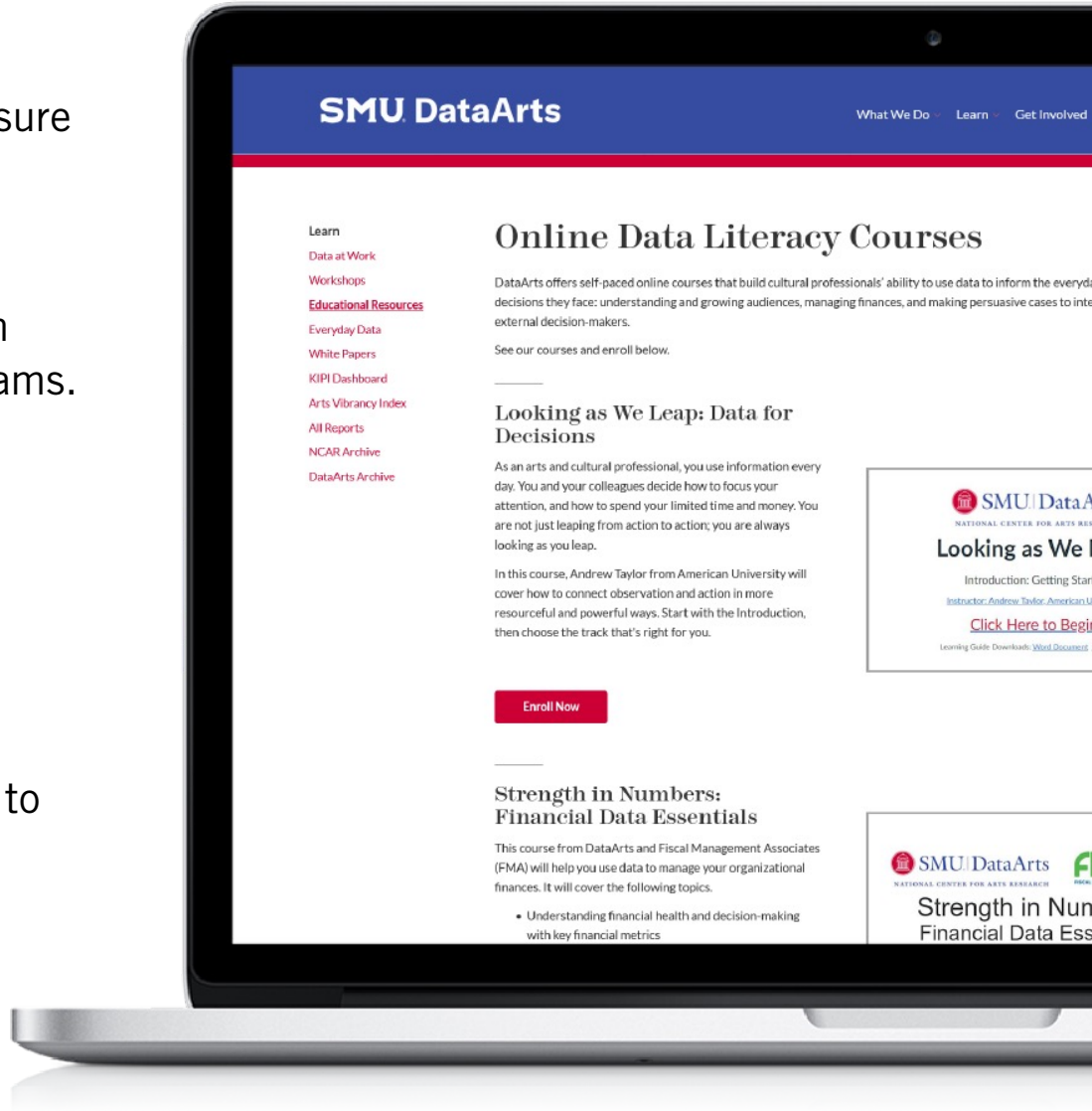
Data Literacy Courses

Looking as We Leap: Data for Decisions
A five-step decision-making process to help clarify options and measure what matters. Created by Andrew Taylor from American University.

Strength in Numbers: Financial Data Essentials
Key financial metrics to gain insight, financial planning aligned with organizational strategy, and tools to determine the full cost of programs. Created with Fiscal Management Associates (FMA).

Connecting the Dots: Audience Data Essentials
Data Capture techniques, key metrics to set goals for success, and basics of audience segmentation. Created with TRG Arts.

Making the Case: Advocacy Basics for Arts Leaders
Campaign planning techniques, tips for strong messaging, and data to understand your position on issues that matter. Created with Julie Hawkins Goodman from Drexel University.



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Data-Driven Insights for the Cultural Sector

SMU DataArts conducts research that provides in-depth insights into the financial and operational health of arts and cultural organizations. Our work highlights both the successes and challenges within the sector, emphasizing issues like equity, funding distribution, and community impact. Through data-driven analysis that inform strategies for sustaining arts organizations and enhancing arts vibrancy across communities, our research serves as a guide for cultural organizations, policymakers, and funders nationwide.

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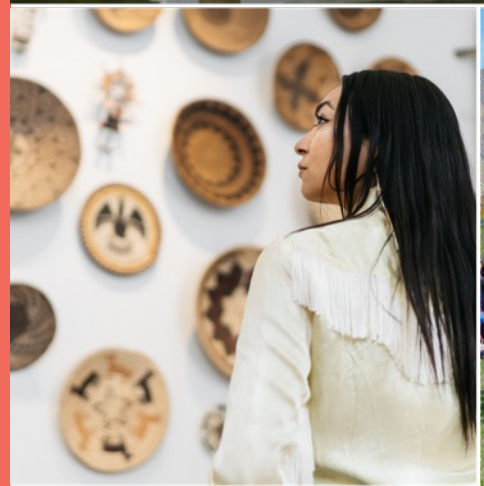
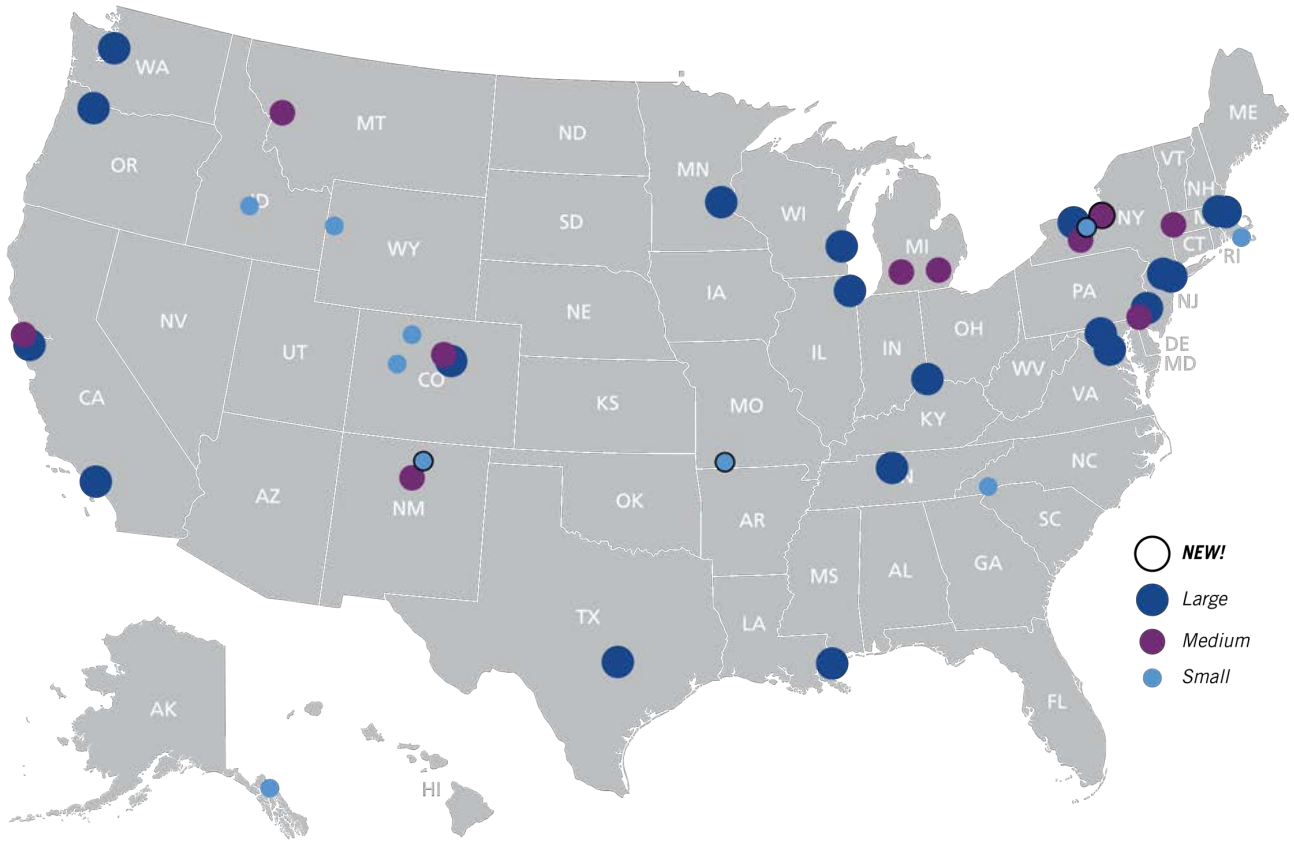


The Arts Vibrancy Index & Interactive Map

SMU DataArts Arts Vibrancy Index is an annual analysis and ranking of the nation's most arts-vibrant communities and states.

The index is composed of thirteen unique measures which cover aspects of supply, demand, and public support for arts and culture, and are adjusted for cost of living and population differences among communities. All metrics have been adjusted to per capita measures and financial metrics have been adjusted for cost of living.

This report is accompanied by an interactive map that provides scores for every county nationwide.



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Dallas, TX 75275-0356

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