



# CULTURAL DATA PROJECT

[www.culturaldata.org](http://www.culturaldata.org)

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The Pew Charitable Trusts

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# Our Agenda

- What is the Cultural Data Project (CDP)?
- CDP's Benefits to the Cultural Sector
- CDP Current State and Expansion
- Demonstration of Features
- CDP for Research, Advocacy, and Policy
- Next Steps / Q&A / Discussion

# Our Mission

The Cultural Data Project (CDP)'s mission is to strengthen the national nonprofit arts and cultural sector by collecting and disseminating comprehensive, high quality longitudinal data that supports fact-based decision-making in three key ways:

- It helps arts and cultural organizations improve their financial management and services to their communities.
- It enables researchers, advocates and policy makers to better tell the story of the sector's assets, contributions, and needs.
- It helps funders more effectively plan for and evaluate their individual and collective grantmaking activities.

# What is the CDP?

- Powerful, online management tool designed to strengthen arts and cultural organizations
- Unique system that allows users to track financial and programmatic performance and to benchmark against other organizations
- Source of reliable, longitudinal data for research, advocacy, and policy
- Collaborative partnership of public and private funders and advocacy organizations in each participating state

# Why is CDP Important Now?

To address the following needs:

- To make the case for supporting the cultural sector
- To provide financial management and operational capacity tools to arts and cultural organizations
- To allow funders to more effectively understand community needs and trends and improve collective grantmaking
- To advance learning and exchange between community leaders, advocates and organizations by using fact-based information

# Benefits to Cultural Organizations

- Streamlined grant application process to funders using the CDP in their grant applications
- Reporting tools to track trends and benchmark organizations against others in the sector
- Toll-free help desk and user support and access to a team of financial consultants
- Statewide on-location, web-based and online training

# Benefits to Researchers and Advocates

- Allows focus on the use of reliable data, rather than data collection
- Better tells the story of the sector's impact, assets, and needs
- Identifies opportunities and challenges for organizations and the field
- Improves cultural policy discourse by providing fact-based information

## Benefits to Funders

- Consistent, reliable information from applicants
- Stand-alone, centralized data is compatible with online and paper-based grant applications
- Customized report for each funding program
- Comprehensive applicant data for research
- Funder participation is investment in cultural sector

# History of the CDP

- 4 Years of planning beginning in 2001
- \$2.28 Million investment to launch
- Originally launched in Pennsylvania in Sept 2004
- Expanded to 7 additional states starting in 2007
  - 2007: Maryland
  - 2008: California
  - 2009: Illinois, New York, Massachusetts, Ohio
  - Michigan: Launched May 3, 2010
- 25 full-time staff housed at Pew

# An Emerging National Model

- More than 8,900 participating organizations
- More than 160 participating funders/grants programs

- States in operation
- States that have expressed interest





# CDP: Profile of Participants

## Broad Range of Cultural Organizations Using CDP

<u>Budget Size</u>	<u>% of Users</u>
\$1-\$99,999	33%
\$100,000-\$249,999	23%
<hr style="border-top: 1px dashed black;"/>	
\$250,000-\$499,999	16%
\$500,000-\$999,999	11%
\$1,000,000-\$4,999,999	12%
\$5,000,000-\$9,999,999	3%
Over \$10,000,000	2%
<hr/>	
TOTAL	100%



# What Cultural Organizations Can Participate?

- Largest and smallest cultural organizations
- 501(c)3 non-profit organizations
- Unincorporated entities, collectives and festivals
- Cultural programs within non-arts organizations
- Organizations using fiscal sponsors
- Any organization throughout a CDP state, even if not applying to a participating funder

# CDP Data Categories

- **Organizational Data**  
Address, tax ID, leg. districts, etc.
- **Revenue**  
Earned, investment, and contributed income
- **Expenses**  
Program, fundraising, admin, healthcare, etc.
- **Marketing Activities**  
Web/Internet, advertising, printing, etc.
- **Investments and Loans**  
Endowments, mortgages, credit lines, etc.
- **Fundraising Campaigns**  
Capital campaigns, endowment campaigns
- **Program Activity**  
Performances, commissions, workshops, etc.
- **Ticketing and Attendance**  
Pricing, membership, school groups, etc.
- **Staffing and Facilities**  
FT/PT staffing, venue capacities, etc.

# 11-Section Data Profile

WELCOME EXAMPLE THEATRE



MY CDP

CULTURAL DATA PROJECT

BUILDING STRENGTH  
THROUGH INFORMATION

---

[Return to MY CDP](#)

Section 1 2 3 4 5 6 7 8 9 10 11

SAVE
CANCEL

When clicking the above buttons, your work is automatically saved.

---

Organization Name: **Example Theatre**    Fiscal Year-End Date: 06/30/2009

[Help Desk](#)   [Form Instructions](#)   [Show Notes](#)

## Section 3 Revenue

Boxes shaded in grey might not apply.

**Earned**

	Unrestricted	Temp Restricted	Perm Restricted	Total 06/30/2009	Total 06/30/2008		
1 Admissions	<input type="text"/>	<input type="text"/>	<input type="text"/>	\$0	\$0		
2 Ticket Sales	\$1,648,790	<input type="text"/>	<input type="text"/>	\$1,648,790	\$1,502,560		
3 Tuitions	\$25,782	<input type="text"/>	<input type="text"/>	\$25,782	\$24,560		
4 Workshop & Lecture Fees	\$6,500	<input type="text"/>	<input type="text"/>	\$6,500	\$5,465		
5 Touring Fees	<input type="text"/>	<input type="text"/>	<input type="text"/>	\$0	\$0		
6 Special Events - Other	<input type="text"/>	<input type="text"/>	<input type="text"/>	\$0	\$0		
7 Gift Shop/Merchandise Sales	<input type="text"/>	<input type="text"/>	<input type="text"/>	\$0	\$0		
7a Gallery Sales	<input type="text"/>	<input type="text"/>	<input type="text"/>	\$0	\$0		
8 Food Sales/Concession Revenue	\$4,506	<input type="text"/>	<input type="text"/>	\$4,506	\$5,240		
8a Parking Concessions	<input type="text"/>	<input type="text"/>	<input type="text"/>	\$0	\$0		
9 Membership Dues/Fees	<input type="text"/>	<input type="text"/>	<input type="text"/>	\$0	\$0		
10 Subscriptions	\$324,800	<input type="text"/>	<input type="text"/>	\$324,800	\$325,100		
11 Contracted Services/Performance Fees	<input type="text"/>	<input type="text"/>	<input type="text"/>	\$0	\$0		

# Standardized definitions ensure consistency and user support

WELCOME EXAMPLE THEATRE

 MY CDP

CULTURAL DATA PROJECT BUILDING STRENGTH THROUGH INFORMATION

Return to MY CDP Section **1** **2** **3** 4 5 6 7 8 9 10 11 SAVE CANCEL

When clicking the above buttons, your work is automatically saved.

Organization Name: **Example Theatre** Fiscal Year-End Date: **06/30/2009** [Help Desk](#) [Form Instructions](#) [Show Notes](#)

### Section 3 Revenue

Earned

**Line Instructions**

**3. Tuitions**

How much revenue did your organization earn from payments for multi-session classes or semester-long courses offered at your organization? Do not include one-time workshops, lectures, or lecture series.

1 Admissions						\$0		
2 Ticket Sales						\$1,502,560		
3 Tuitions						\$24,580		
4 Workshop & Lecture Fees						\$5,465		
5 Touring Fees						\$0		
6 Special Events - Other						\$0		
7 Gift Shop/Merchandise Sales						\$0		
7a Gallery Sales						\$0		
8 Food Sales/Concession Revenue		\$4,506				\$4,506		
8a Parking Concessions						\$0		
9 Membership Dues/Fees						\$0		
10 Subscriptions		\$324,800				\$324,800		
11 Contracted Services/Performance Fees						\$0		

**Total 06/30/2008**

# Notes for institutional memory and user assistance

WELCOME EXAMPLE THEATRE

MY CDP

CULTURAL DATA PROJECT

BUILDING STRENGTH THROUGH INFORMATION

Return to MY CDP Section

When clicking the above buttons, your

Organization Name: Example Theatre

**Section 3**  
**Revenue**

Earned

1 Admissions

2 Ticket Sales

3 Tuitions

4 Workshop & Lecture Fees

5 Touring Fees

6 Special Events - Other

7 Gift Shop/Merchandise Sales

7a Gallery Sales

8 Food Sales/Concession Revenue

8a Parking Concessions

9 Membership Dues/Fees

10 Subscriptions

11 Contracted Services/Performance Fees

4. Workshop & Lecture Fees

Two Workshops: Sarah Sondheim and Kara Thrace.

Save Cancel

Notes from Other Years

Note	Year(s)
Did not have any workshops this year. We had one with Savion Glover but it was canceled.	06/30/2008
One Workshop: Apollo Admana	06/30/2007
One Lecture: Modern Dance evolution	06/30/2005

total 0/2008

\$0	[edit]	[help]
\$1,502,560	[edit]	[help]
\$24,560	[edit]	[help]
\$5,065	[edit]	[help]
\$0	[edit]	[help]
\$5,240	[edit]	[help]
\$0	[edit]	[help]
\$0	[edit]	[help]
\$324,800	[edit]	[help]
\$0	[edit]	[help]

# Streamlined application process to participating funders



## Funder Reports

Funder reports contain your Pennsylvania CDP data specially formatted for submission with a funder's grant application.

You can generate a report of your entire Data Profile by selecting the Full Pennsylvania CDP Profile Report from the bottom of the list.

### To generate a Funder Report:

1. Select a fiscal year-end date
2. Click on a report
3. Print or save a copy of the report

**Note:** A DRAFT watermark appears on Funder Reports for Data Profile

Progress or Under Revision. You must submit a Draft Report for a fiscal year without a watermark. To submit a report, find the Data Profile, and click CHECK & SUBMIT.

Fiscal year-end:

### Pennsylvania Council on the Arts

- [Arts Organization & Arts Program \(AOAP\)](#)
- [Pennsylvania Partners in the Arts - Program](#)

### Philadelphia Cultural Fund

- [Philadelphia Cultural Fund 2009 Application](#)

### Pennsylvania Historical and Museum Commission

- [General Operating Support for Museums](#)

### The Pew Charitable Trusts and Related Initiatives

- [Dance Advance](#)
- [Heritage Philadelphia Program \(HPP\)](#)
- [Philadelphia Exhibitions Initiative \(PEI\)](#)
- [Philadelphia Music Project \(PMP\)](#)
- [Philadelphia Theater Initiative \(PTI\)](#)
- [Philadelphia Cultural Leadership Program \(PCLP\)](#)
- [Philadelphia Cultural Management Initiative \(PCMI\)](#)
- [Philadelphia Cultural Management Initiative](#)

### William Penn Foundation

- [Arts & Culture Program](#)

**report[2].pdf - Adobe Reader**

File Edit View Document Tools Window Help

1 / 6 100%

**Pennsylvania Council on the Arts**  
**AOAP and ENTRY TRACK - PA Cultural Data Project**  
 FY2009-2010 33-K-420  
 Postmark Deadline: December 5, 2008  
 Organization/Subsidiary Name: Example Theatre

**report[1].pdf - Adobe Reader**

File Edit View Document Tools Window Help

2 / 8 100%

**Example Theatre**  
**Philadelphia Theater Initiative Grant Application**

**ORGANIZATIONAL INFORMATION:**  
 Organization Name: Example Theatre  
 Year Organization Founded: 1988

**report[1].pdf - Adobe Reader**

File Edit View Document Tools Window Help

2 / 11 77.5%

**Example Theatre**  
**Philadelphia Cultural Fund Grant Application 2009**

**FINANCIAL SUMMARY**  
 Below is a summary of the organization's financial activities. Definitions of key items appear below.

Financial Activity	FY 2005	FY 2006 % change	FY 2007 % change	FY 2008 % change
<b>Unrestricted Activity</b>				
Revenue				
Eamed				
Program	\$1,847,599	\$1,854,548 -0%	\$1,336,332 -28%	\$1,876,245 40%
Non-program	77,786	34,504 -56%	33,204 -4%	34,740 5%
Total Eamed	1,925,385	1,889,052 -2%	1,369,536 -28%	1,910,985 40%
Investment	65,030	127,259 96%	254,390 100%	275,400 8%
Contributed	1,810,761	1,530,162 -15%	1,826,744 19%	1,853,740 1%
<b>Total Unrestricted Revenue</b>	<b>\$3,801,156</b>	<b>\$3,546,473 -7%</b>	<b>\$3,450,670 -3%</b>	<b>\$4,040,125 17%</b>
<b>Expenses</b>				
Program	\$2,555,885	\$2,822,414 10%	\$2,950,450 5%	\$2,892,953 -2%
Fundraising	258,883	231,601 -11%	356,240 54%	300,210 -16%
General & administrative	513,889	553,637 8%	260,781 -53%	636,667 144%
<b>Total Expenses</b>	<b>\$3,328,657</b>	<b>\$3,607,652 8%</b>	<b>\$3,567,451 -1%</b>	<b>\$3,829,830 7%</b>
Net Unrestricted Activity	\$472,499	(\$61,179) -113%	(\$116,781) -91%	\$210,295 280%
Net Temporarily Restricted Activity	(\$198,000)	\$610,667 408%	\$425,000 -30%	\$304,500 -28%
Net Permanently Restricted Activity	\$0	n/a	\$0	\$250,000 n/a
<b>Net Total Activity</b>	<b>\$274,499</b>	<b>\$549,488 100%</b>	<b>\$308,219 -44%</b>	<b>\$764,795 148%</b>

**Net Unrestricted (UR) Activity** includes all operating revenue and expenses, funds used to purchase fixed assets, and market value changes in endowments and other investments. Therefore, the Net UR Activity line may include more than just an operating surplus or deficit.

**Net Temporarily Restricted (TR) Activity** includes TR contributions that are restricted by the donor for a specific purpose or specific time. Some examples of temporarily restricted contributions are gifts for specific programs or productions, gifts for operations for future years, and capital campaign gifts for facilities that are not yet built. When the restriction is fulfilled, the net assets are released to the unrestricted operating statement. "Net TR Activity" is the sum of all new TR contributions minus those released to unrestricted.

**Net Permanently Restricted (PR) Activity** includes PR contributions that are restricted by the donor in perpetuity. The most common example is a gift to an endowment fund.

Balance Sheet Summary	FY 2005	FY 2006 % change	FY 2007 % change	FY 2008 % change
Total Assets	\$5,328,209	\$5,829,409 9%	\$7,141,795 23%	\$7,400,906 4%
Total Liabilities	\$1,768,901	\$1,720,313 -3%	\$2,724,480 58%	\$2,218,796 -19%
Total Net Assets	\$3,559,308	\$4,109,096 15%	\$4,417,315 8%	\$5,182,110 17%
Total Liabilities & Net Assets	\$5,328,209	\$5,829,409 9%	\$7,141,795 23%	\$7,400,906 4%

# CDP Reporting Features

- In addition to collecting data, the data is given back to participating groups
- A powerful reporting interface allows organizations with submitted data to:
  - View instant Annual Reports
  - View crucial trends in their performance
  - Benchmark their performance against others
  - Share reports with trustees and staff
- Reporting interface provides easy access to detailed information through 77 reports

# User Reporting Interface: Access to 77 Reports



CULTURAL DATA PROJECT

WELCOME EXAMPLE THEATRE | [LOGOUT](#)

 R E P O R T S

CULTURAL DATA PROJECT

BUILDING STRENGTH THROUGH INFORMATION

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**MY CDP**

**GETTING STARTED**

**ANNUAL REPORT**

**STANDARD REPORTS**

Program Activity

Personnel

Unrestricted Activity

Program Revenue & Marketing Expense

Select Trend / Comparison

Select Years

■ [View Main Report](#)

Detail Reports

Program Revenue

Marketing Expense

Contributed Revenue & Fundraising Expense

Balance Sheet

**CUSTOM REPORTS**

**SAVED REPORTS**

CDP REPORTS HOME

[HELP](#) [DESK](#)

[LOGOUT](#)

## Welcome to the Cultural Data Project Reports.

The CDP Reports website is a powerful tool for understanding important information about your organization. Using data you have already submitted to the CDP, this site will produce important reports that will help you better understand your organization, view trends in performance, and benchmark your organization against others. [Need help getting started?](#)

**These are the types of reports you can select:**

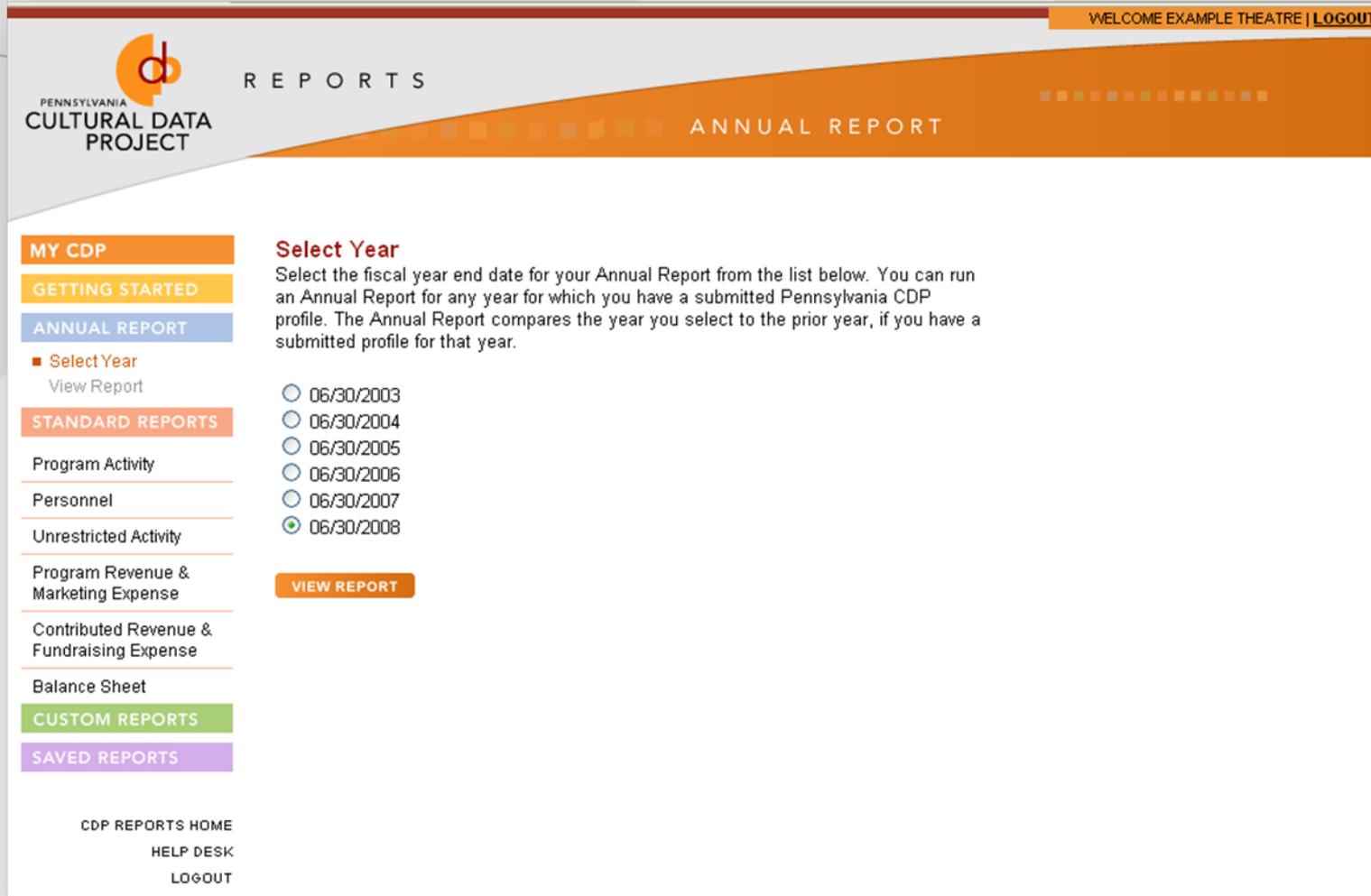
 **ANNUAL REPORT - Example Theatre**  
See an instantly available Annual Report for your organization that includes tables and graphs summarizing your financial activity, program activity and attendance. You can also add your own information and descriptions about your activities to this powerful report. [VIEW ►](#)

 **STANDARD REPORTS**  
The Standard Reports provide valuable information that can help you better understand and manage your organization. These reports also feature "drill down" detail reports that provide further information on each report.

Each Standard Report can be viewed in two distinct ways:

- **Trend:** View reports that look at multiple years of your data to help you understand important trends in your organization's performance and activities over time.
- **Comparison:** View reports that compare your organization to other cultural organizations (in aggregate) as a means to benchmark your performance using a wide range of comparison criteria. [VIEW ►](#)

# Annual Report: Generates Instantly in 3 Clicks



The screenshot shows a web interface for the Pennsylvania Cultural Data Project. At the top right, it says "WELCOME EXAMPLE THEATRE | LOGOUT". The main header includes the logo and the word "REPORTS". A navigation bar below the header has several tabs: "MY CDP", "GETTING STARTED", "ANNUAL REPORT", "STANDARD REPORTS", "CUSTOM REPORTS", and "SAVED REPORTS". The "ANNUAL REPORT" tab is active. Under "ANNUAL REPORT", there is a sub-section "Select Year" with a "View Report" link. The "STANDARD REPORTS" section lists various report types: Program Activity, Personnel, Unrestricted Activity, Program Revenue & Marketing Expense, Contributed Revenue & Fundraising Expense, and Balance Sheet. The "Select Year" section contains a list of radio buttons for fiscal year end dates from 2003 to 2008, with 2008 selected. A "VIEW REPORT" button is located below the year list. At the bottom left, there are links for "CDP REPORTS HOME", "HELP DESK", and "LOGOUT".

PENNSYLVANIA  
CULTURAL DATA  
PROJECT

REPORTS

WELCOME EXAMPLE THEATRE | LOGOUT

ANNUAL REPORT

MY CDP

GETTING STARTED

ANNUAL REPORT

■ Select Year  
View Report

STANDARD REPORTS

Program Activity

Personnel

Unrestricted Activity

Program Revenue & Marketing Expense

Contributed Revenue & Fundraising Expense

Balance Sheet

CUSTOM REPORTS

SAVED REPORTS

CDP REPORTS HOME  
HELP DESK  
LOGOUT

**Select Year**

Select the fiscal year end date for your Annual Report from the list below. You can run an Annual Report for any year for which you have a submitted Pennsylvania CDP profile. The Annual Report compares the year you select to the prior year, if you have a submitted profile for that year.

- 06/30/2003
- 06/30/2004
- 06/30/2005
- 06/30/2006
- 06/30/2007
- 06/30/2008

VIEW REPORT

# Annual Report: Financial Activity



CULTURAL DATA PROJECT



CULTURAL DATA PROJECT

REPORTS

ANNUAL REPORT

WELCOME EXAMPLE THEATRE | LOGOUT

PRINT SAVE HELP

## Example Theatre Annual Report

Use this space to provide an overview of this Annual Report, describing some of the key highlights that are reflected in the data. For more information on how to use this space click on GETTING STARTED.

[Click here to add your notes](#)

Financial Activity <span style="float: right; font-size: small;">TELL ME MORE</span>	FY 2007	FY 2008	% chg
<b>Unrestricted Activity</b>			
<b>Revenue</b>			
<b>Earned</b>			
Program	\$1,336,332	\$1,876,245	40%
Non-program	33,204	34,740	5%
<b>Total Earned</b>	1,369,536	1,910,985	40%
<b>Investment</b>	254,390	275,400	8%
<b>Contributed</b>	1,826,744	1,853,740	1%
<b>Total Unrestricted Revenue</b>	<b>\$3,450,670</b>	<b>\$4,040,125</b>	<b>17%</b>
<b>Expenses</b>			
Program	\$2,950,450	\$2,892,953	-2%
Fundraising	356,240	300,210	-16%
General & administrative	260,761	636,667	144%
<b>Total Expenses</b>	<b>\$3,567,451</b>	<b>\$3,829,830</b>	<b>7%</b>
<b>Net Unrestricted Activity</b>	<b>(\$116,781)</b>	<b>\$210,295</b>	
<b>Net Temporarily Restricted Activity</b>	<b>\$425,000</b>	<b>\$304,500</b>	
<b>Net Permanently Restricted Activity</b>	<b>\$0</b>	<b>\$250,000</b>	
<b>Net Total Activity</b>	<b>\$308,219</b>	<b>\$764,795</b>	

### Revenue

**FY 2007**

**FY 2008**

Legend: Earned (Dark Blue), Investment (Light Blue), Contributed (Lightest Blue)

### Expense

**FY 2007**

**FY 2008**

Legend: Program (Dark Green), Fundraising (Medium Green), G & A (Light Green)

CDP REPORTS HOME    HELP DESK    LOGOUT

# Annual Report: Attendance and Program Activity Sections



CULTURAL DATA  
PROJECT

<b>Attendance</b> <small>TELL ME MORE</small>	FY 2007	FY 2008	% chg
Total paid attendance	82,340	89,453	9%
Total free attendance	9,000	8,450	-6%
<b>Total attendance</b>	<b>91,340</b>	<b>97,903</b>	<b>7%</b>
Total school children attendance	11,000	11,000	0%
Number of groups of school children	150	145	-3%
Number of other groups	145	135	-7%
Classes and workshops attendance	475	395	-17%

Use this space to describe any relevant items relating to your attendance figures or significant differences from year to year.

[Click here to add your notes](#)

<b>Program Activity</b> <small>TELL ME MORE</small>	FY 2007	FY 2008	% chg
Productions	7	7	0%
Public performances - at home	425	398	-6%
Classes/Workshops - for the public	42	38	-10%
Lectures	92	88	-4%
Local premieres	1	1	0%
Workshops or readings of new works	2	0	n/a
Off-site school programs	8	5	-38%
Facility rentals - of your org. for another's program use	3	2	-33%

Use this space to describe any relevant items relating to your program activities or significant differences from year to year.

[Click here to add your notes](#)

PRINT

SAVE

HELP

# On-Screen Information and Guidance



CULTURAL DATA PROJECT



CULTURAL DATA PROJECT

REPORTS

ANNUAL REPORT

WELCOME EXAMPLE THEATRE | [LOGOUT](#)

**MY CDP**

GETTING STARTED

ANNUAL REPORT

STANDARD REPORTS

Program Activity

Personnel

Unrestricted Activity

Program Revenue & Marketing Expense

Select Trend / Comparison

Select Years

View Main Report

Detail Reports

Program Revenue

Marketing Expense

Contributed Revenue & Fundraising Expense

Balance Sheet

CUSTOM REPORTS

SAVED REPORTS

CDP REPORTS HOME

HELP DESK

LOGOUT

## Example Theatre Annual Report

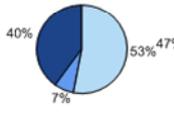
Use this space to provide an overview of this Annual Report, describing some of the key highlights that are reflected in the data. For more information on how to use this space click on GETTING STARTED.

[Click here to add your notes](#)

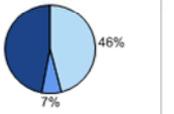
Financial Activity <span style="float: right;"><a href="#">TELL ME MORE</a></span>	FY 2007	FY 2008	% chg
<b>Unrestricted Activity</b>			
<b>Revenue</b>			
<b>Earned</b>			
Program	\$1,336,332	\$1,876,245	40%
Non-program	33,204	34,740	5%
<b>Total Earned</b>	1,369,536	1,910,985	40%
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<b>Total Unrestricted Revenue</b>	<b>\$3,450,670</b>	<b>\$4,014,125</b>	<b>17%</b>
<b>Expenses</b>			
Program			
Fundraising			
General & administrative			
<b>Total Expenses</b>			
<b>Net Unrestricted Activity</b>	<b>(\$116,781)</b>	<b>\$210,295</b>	
<b>Net Temporarily Restricted Activity</b>	<b>\$425,000</b>	<b>\$304,500</b>	
<b>Net Permanently Restricted Activity</b>	<b>\$0</b>	<b>\$250,000</b>	
<b>Net Total Activity</b>	<b>\$308,219</b>	<b>\$764,795</b>	

**Revenue**

FY 2007



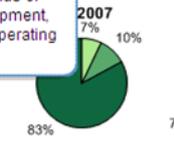
FY 2008



Legend: Earned (dark blue), Investment (light blue), Contributed (lightest blue)

**Expense**

2007



FY 2008



Legend: Program (dark green), Fundraising (medium green), G & A (light green)

**Unrestricted (UR) Activity**  
Includes all operating revenue and expense, non-operating revenue such as funds used to purchase fixed assets, and market value changes in endowments and other investments. Therefore, the Net UR Activity line may include more than just an operating surplus or deficit; it may include revenue to be used for purchasing equipment, the unrealized gains or losses in investments or other non-operating revenue.

# On-Screen Information and Guidance



CULTURAL DATA  
PROJECT

Attendance	FY 2007	FY 2008	% chg	
Total paid attendance				<a href="#">Use this report to describe your attendance</a>
Total free attendance				
<b>Total attendance</b>				
Total school children attended				
Number of groups of school children				
Number of other groups				
Classes and workshops				

Program Activity	FY 2007	FY 2008	% chg	
Productions				
Public performances - at your organization				
Classes/Workshops - for your organization				
Lectures	92	88	-4%	<a href="#">Click here to add your notes</a>
Local premieres	1	1	0%	
Workshops or readings of new works	2	0	n/a	
Off-site school programs	8	5	-38%	
Facility rentals - of your org. for another's program use	3	2	-33%	

**TELL ME MORE - Attendance**

There are many ways you can track attendance, and use the information to inform your marketing efforts:

- Do you record attendance for all your activities and calculate the average attendance per activity?
- Do you track and analyze how different pricing and marketing efforts affect your attendance figures?
- If you offer performances, classes, or other activities with a limit to the number of participants, do you track the percentage of paid capacity sold? You can evaluate whether you should provide more or fewer offerings based on your paid capacity.
- Do you know how much "repeat" attendance you have versus new attendance? You can track figures such as subscription renewal rate, individuals who sign up for multiple classes or who purchase multiple admissions.
- Do you know who your audience is, and how they heard about your activities? You can learn more through customer surveys, or asking questions at the point of sale.

Be sure to use the annotation feature to the right of this section to enter any notes, comments, or observations you wish to include with this report. You can then save these notes and print or save this report.

[Click here to add your notes](#)

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# Notes Displayed on the Report



CULTURAL DATA PROJECT



REPORTS

CULTURAL DATA PROJECT

WELCOME EXAMPLE THEATRE | [LOGOUT](#)

ANNUAL REPORT

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**MY CDP**

GETTING STARTED

ANNUAL REPORT

Select Year

View Report

**STANDARD REPORTS**

Program Activity

Personnel

Unrestricted Activity

Program Revenue & Marketing Expense

Contributed Revenue & Fundraising Expense

Balance Sheet

**CUSTOM REPORTS**

**SAVED REPORTS**

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## Example Theatre Annual Report

**Annual Report - Overview**

Use this space to provide an overview of this Annual Report, describing some of the key highlights that are reflected in the data.

[ADD TO REPORT](#)
[CANCEL](#)

Use For

Clicked

Revenue

Unrestricted

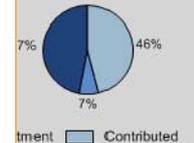
Program

Net Total Activity

<b>Total Expenses</b>	<b>\$3,567,451</b>	<b>\$3,829,830</b>	<b>7%</b>
<b>Net Unrestricted Activity</b>	<b>(\$116,781)</b>	<b>\$210,295</b>	
<b>Net Temporarily Restricted Activity</b>	<b>\$425,000</b>	<b>\$304,500</b>	
<b>Net Permanently Restricted Activity</b>	<b>\$0</b>	<b>\$250,000</b>	
<b>Net Total Activity</b>	<b>\$308,219</b>	<b>\$764,795</b>	

**Revenue**

**FY 2008**

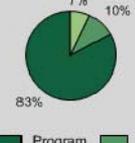


7% 46% 7%

Program Fundraising Contributed

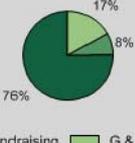
**Expense**

**FY 2007**



83% 10% 7%

**FY 2008**



76% 17% 8%

Program Fundraising G & A

# Trend Report: Program Revenue & Marketing Expense



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CULTURAL DATA PROJECT

PROGRAM REVENUE & MARKETING EXPENSE TREND REPORT

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- STANDARD REPORTS
  - Program Activity
  - Personnel
  - Unrestricted Activity
  - Program Revenue & Marketing Expense
    - Select Trend / Comparison
    - Select Years
    - View Main Report**
  - Detail Reports
    - Program Revenue
    - Marketing Expense
  - Contributed Revenue & Fundraising Expense
  - Balance Sheet
- CUSTOM REPORTS
- SAVED REPORTS

This report shows the components of program revenue and the percentage of the total that the source represents.

Marketing

Total program revenue

Total marketing expense

Marketing revenue

Marketing expense

Total program revenue

Total marketing expense

Marketing revenue

Marketing expense

Total program revenue

Total marketing expense

Marketing revenue

Marketing expense

## Example Theatre Program Revenue & Marketing Expense Trend Report Program Revenue Detail

This detail report shows the components of program revenue and the percentage of the total that the source represents.

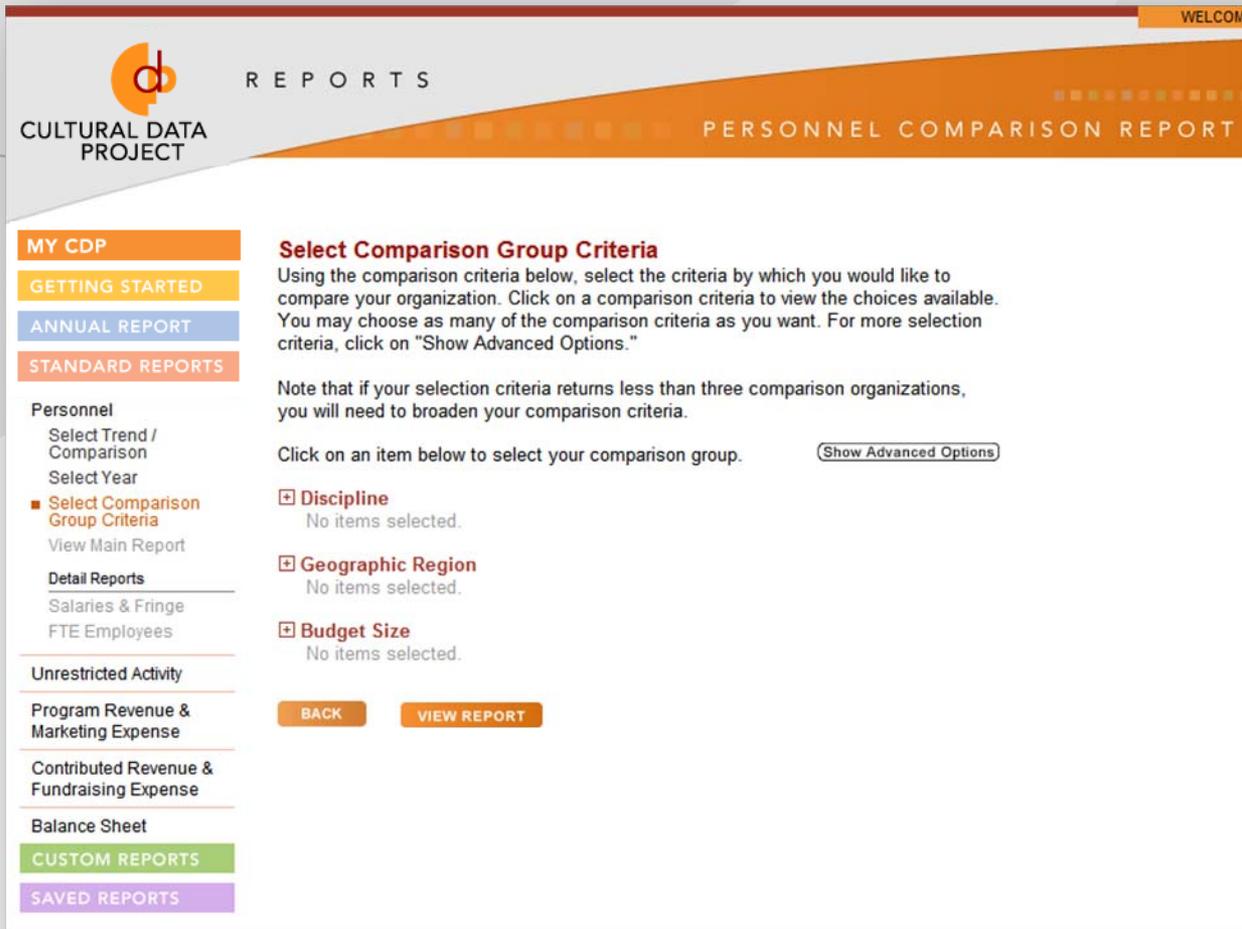
Program Revenue	FY 2006	% of total	FY 2007	% of total	FY 2008	% of total
Admissions	\$0	0%	\$0	0%	\$0	0%
Ticket sales	1,074,169	58%	845,560	63%	1,502,560	80%
Tuitions	32,824	2%	28,562	2%	24,560	1%
Workshop & lecture fees	0	0%	0	0%	5,465	~0%
Touring fees	0	0%	0	0%	0	0%
Special events - other	0	0%	0	0%	0	0%
Gallery sales	0	0%	0	0%	0	0%
Membership dues/fees	0	0%	0	0%	0	0%
Subscriptions	716,931	39%	435,890	33%	325,100	17%
Contracted services/performance fees	0	0%	0	0%	0	0%
Rental income - program use	30,624	2%	26,320	2%	18,560	1%
Sponsorship revenue	0	0%	0	0%	0	0%
<b>Total Program Revenue</b>	<b>\$1,854,548</b>	<b>100%</b>	<b>\$1,336,332</b>	<b>100%</b>	<b>\$1,876,245</b>	<b>100%</b>

"Drill-Down" Detail Reports



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# Comparison Reports: Selection Criteria



WELCOME

CULTURAL DATA PROJECT

REPORTS

PERSONNEL COMPARISON REPORT

**MY CDP**

GETTING STARTED

ANNUAL REPORT

STANDARD REPORTS

Personnel

- Select Trend / Comparison
- Select Year
- Select Comparison Group Criteria**
- View Main Report

**Detail Reports**

- Salaries & Fringe
- FTE Employees

Unrestricted Activity

- Program Revenue & Marketing Expense
- Contributed Revenue & Fundraising Expense
- Balance Sheet

CUSTOM REPORTS

SAVED REPORTS

**Select Comparison Group Criteria**

Using the comparison criteria below, select the criteria by which you would like to compare your organization. Click on a comparison criteria to view the choices available. You may choose as many of the comparison criteria as you want. For more selection criteria, click on "Show Advanced Options."

Note that if your selection criteria returns less than three comparison organizations, you will need to broaden your comparison criteria.

Click on an item below to select your comparison group. [Show Advanced Options](#)

**Discipline**  
No items selected.

**Geographic Region**  
No items selected.

**Budget Size**  
No items selected.

[BACK](#) [VIEW REPORT](#)

# Comparison Report: Personnel

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[Program Activity](#)

[Personnel](#)

[Select Trend /  
Comparison](#)

[Select Year](#)

[Select Comparison  
Group Criteria](#)

[View Main Report](#)

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[Salaries & Fringe](#)

[FTE Employees](#)

[Unrestricted Activity](#)

[Program Revenue &  
Marketing Expense](#)

[Contributed Revenue &  
Fundraising Expense](#)

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## Example Theatre Personnel Comparison Report

This report compares your organization's salaries and fringe benefit costs, number of full time equivalent employees (FTEs), and share of healthcare costs to the average and median of the comparison group of participating organizations you selected.

### Comparison Group

**There are 3 organizations in the comparison group.**

**The following criteria was used to determine the comparison group:**

#### Discipline

Theatre

#### Cities

Los Angeles (California)

San Diego (California)

San Francisco (California)

Baltimore (Maryland)

Philadelphia (Pennsylvania)

Pittsburgh (Pennsylvania)

#### Budget Size

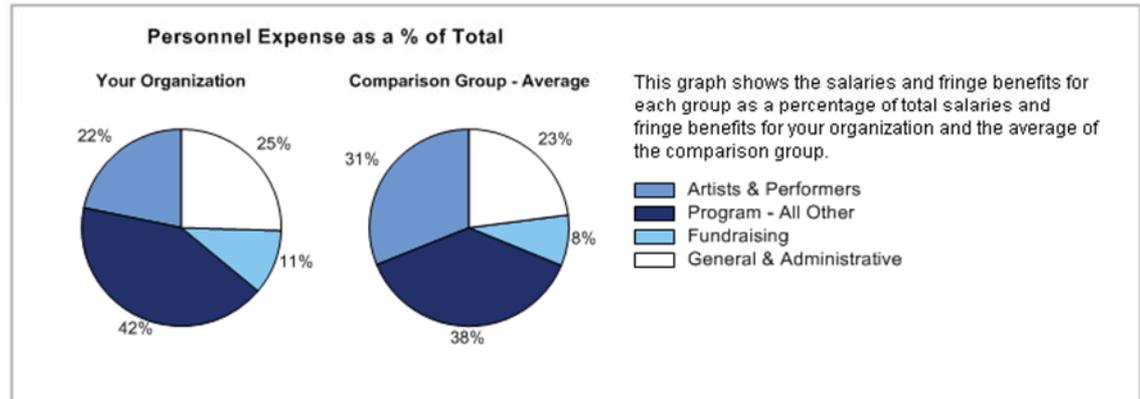
\$2,500,000 - \$4,999,999

*Note on medians in your comparison group: Individual median values and percentages in this report may not add up to the totals displayed, because each total has a distinct median that is not the sum of the individual medians.*

# Comparison Report: Personnel

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	FY 2008	% of total	Comparison Group		FY 2008	% of total
			Average	Median		
<b>Salaries and Fringe Benefits</b> <a href="#">TELL ME MORE</a>						
<b>Program</b> <input type="checkbox"/>						
Artists & performers	\$382,237	22%	\$624,916	31%	\$330,196	20%
Program - all other	741,581	42%	648,384	38%	701,263	42%
<b>Total Program</b>	<b>1,123,818</b>	<b>64%</b>	<b>1,273,300</b>	<b>69%</b>	<b>1,266,547</b>	<b>68%</b>
Fundraising	186,991	11%	153,676	8%	146,281	8%
General & Administrative	447,324	25%	428,658	23%	503,213	24%
<b>Total Salaries and Fringe</b>	<b>\$1,758,133</b>	<b>100%</b>	<b>\$1,855,634</b>	<b>100%</b>	<b>\$1,673,846</b>	<b>100%</b>
<b>Total Expenses</b>	<b>\$3,829,830</b>		<b>\$3,622,816</b>		<b>\$3,307,507</b>	
<b>As a % of Total Expenses</b>	<b>46%</b>		<b>51%</b>		<b>51%</b>	



	FY 2008	% of total	Comparison Group		FY 2008	% of total
			Average	Median		
<b>Full-Time Equivalent (FTEs)</b> <a href="#">TELL ME MORE</a>						
<b>Program</b> <input type="checkbox"/>						
Artists & performers	31.00	38%	31.38	22%	24.00	23%
Program - all other	30.00	37%	50.36	46%	33.08	47%
<b>Total Program</b>	<b>61.00</b>	<b>75%</b>	<b>81.74</b>	<b>68%</b>	<b>54.00</b>	<b>70%</b>
Fundraising	4.50	6%	3.30	3%	3.50	4%
General & Administrative	15.75	19%	30.22	29%	29.10	26%



## CDP Data

### Ensuring Data Integrity and Accuracy:

- Annual audit serves as main source of data
- Automated error checking
- Offline data review
- Training sessions for all users
- Toll-Free help desk for all users
- Financial consultants on call



# CDP Data for Research, Advocacy, and Policy

## Reliable, Longitudinal Data for:

- Internal research and analysis for funders
- Research and analysis for advocacy and policy
- Published research and reports on the sector



# Research and Analysis for Advocacy

philly.com

**The Philadelphia Inquirer**



*“Using figures gleaned from the Pennsylvania Cultural Data Project, researchers from the alliance contend that the proposed tax would only raise about \$13 million annually.”*

# Research and Analysis for Advocacy

CDP cited in NEA chairman Rocco Landesman's congressional testimony to the Appropriations Subcommittee on Interior, Environment and Related Agencies:

*"I was in Pennsylvania last week, and the Governor cited the Pennsylvania Cultural Data Project, which reports that in Pennsylvania alone, nonprofit cultural organizations and their audiences had direct expenditures of \$1.99 billion, which supports over 48,000 full-time equivalent jobs and means over \$900,000,000 in resident household income."*

*- April 13, 2010*

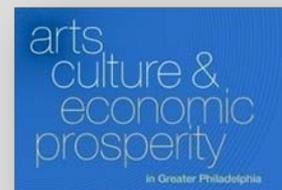
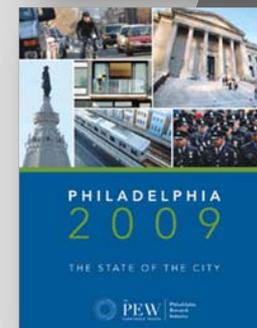
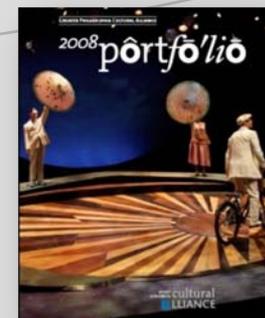




# Robust Data for Research and Reports

Types of Research and Reports possible:

- Broad analysis or census of the cultural sector
- Economic impact analysis
- Regional cultural planning
- Economic development planning
- Needs assessments (sector and disciplines)
- Organizational health and capacity



# Cultural Sector by the Numbers *pôrtfô'liô*

**\$562** million in annual expenses; **14,000** employees

**56,000** events annually; **12 million** cultural visits per year

**17,000** volunteer positions; **3,800** board members

**730,000** memberships/subscriptions; **270,000** individual contributions



# Employment & Compensation:

The sector is a significant employer, but compensation is low



Employment and payroll at Portfolio organizations and other industries in Southern PA



# pôrtfô'liô

## Portfolio 2008 Report:

**Arts are vibrant** — 15 million total visits per year

**And valuable**

45% of income is contributed

**...but vulnerable**

40% of cultural organizations operate at a deficit

Organizations  
operating without  
a deficit



60%

Organizations  
operating at  
a deficit 40%

# Theatre Attendance/Performance Trends

- Annual increase in the number of performances
- Steady decrease in the total attendance per performance



AVERAGE TOTAL ANNUAL PERFORMANCES

AVERAGE TOTAL ATTENDANCE PER PERFORMANCE





# Direct and Indirect Economic Impact

**The nonprofit arts and cultural sector of Southeastern Pennsylvania generates \$1.3 billion in expenditures annually.**

**This \$1.3 billion generates 40,000 jobs.**

21,000 jobs from direct expenditures by organizations and audiences  
+ 19,000 jobs from the indirect effect of that spending as dollars  
ripple through the economy of Southeastern Pennsylvania

---

40,000 jobs



**This is equivalent to 10 jobs for every 1,000 residents in the region.**

**In similar regions, arts and culture generates 4 jobs for every 1,000 residents.**

This is clear evidence of the importance of arts and culture to the economy of Southeastern Pennsylvania.

# Adopting CDP in a New State

## How it works:

- State-by-State or Multi-State expansion process
- Turnkey solution: All technology and services are replicated for each new state
- Task force of public and private funders and advocacy organizations lead the process and secure operating costs
- CDP staff lead launch and implementation
- May take 6-12 months of task force planning to launch in a new state

## CDP Investment and Costs

- Each state's budget is based on:
  - Number of arts and cultural organizations participating
  - Number of funders requiring CDP participation in their grant application processes
- Task Force ensures multi-year funding commitment
- "At-cost" business model (no cost to cultural organizations)
- Economies of scale are passed along to states
- Potential national funds to underwrite some costs

## Next Steps / Q&A / Discussion

National Website: [www.culturaldata.org](http://www.culturaldata.org)

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