Data & Arts™
Orientation to DataArts

January 31, 2018
Mission

DataArts empowers the nonprofit arts and culture sector with high-quality data and resources in order to strengthen its vitality, performance, and public impact.

The Arts Council of Martin County, Stuart, FL. Photo credit: Thomas Winter
Standard Data

Financial Transactions

QuickBooks

Ticket Sales and Attendance

Artfully

Donations and Support

salesforce

CIVICRM

Eventbrite

Microsoft® Access®
Data from across the sector

Finances, Programs, People
“Anecdotally, we’ve always known that arts and culture are a big business, it’s the first time that we’ve actually had access to the data. You put us all together and we have major heft.”

Catherine Peterson
Executive Director
ArtsBoston, Boston, MA
Our Audience

Arts & Cultural Organizations

Grantmakers

Researchers & Advocates
13
Years of data collection

20,000+
Organizations in the CDP

78,429
Data Profiles

6,964
Organizations with 3 or more years of data
The DataArts Platform
Join or Set Up an Organization

Is your organization already up and running with DataArts or just getting started? Find and join your organization or set up a new organization account.

Your Join Requests

You have not yet requested to join any organizations.

Analytics Reports

Know where your organization stands. After your data is entered, you can compare against your peers and analyze your financial position, fundraising, marketing, and more. Want a preview? Download sample reports below.

<table>
<thead>
<tr>
<th>Report Type</th>
<th>Sample</th>
</tr>
</thead>
<tbody>
<tr>
<td>Annual Report</td>
<td>Download</td>
</tr>
</tbody>
</table>

Keep lines of communication open between your organization and funders with a consolidated annual report.

View more analytic reports

New Features Are Coming Soon...

As part of our commitment to empower the cultural sector with high-quality data and data-driven insights, we are developing a new function for finding grant opportunities. Keep an eye on our blog and our weekly newsletter.

In the meantime...

Cultural managers who need to run Funder Reports may contact the Support Center at (555) 555-5555 or support@dataarts.com.
Join or Set Up an Organization

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Keep lines of communication open between your organization and funders with a consolidated annual report.

View more analytic reports

Welcome to DataArts!

The links below will help you get more out of DataArts.

Changes to the CDP
What’s different in the Cultural Data Profile?

Data Migration FAQ
Where are my existing Cultural Data Profiles?

Analytic Reports
How should I use the reports?

New User Overview
How do I get started?

New Online Courses in Data Use
Use data to make informed decisions, manage finances, grow audiences, and advocate for the arts with our free online courses.

In the meantime...

Cultural managers who need to run Funder Reports may contact the Support Center at...
New Organization Setup

Basic Information

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

Organization Type

Select one or more.

- Nonprofit Organization
- Grantmaker Organization

Organization Details

- This is a demo organization.

Organization Name: Fifth Street Press

- This is my organization's legal name

Federal ID

DUNS Number

(next)
Start a Survey

Welcome to the DataArts platform. The first step is to complete a survey. Click on “Start a Survey” to begin.

Funder Reports and Grants

Find your grantmakers and submit data for an upcoming deadline, or search for new grant opportunities.

Type search terms here...

Your Survey Providers

Add survey providers ➤

Welcome to DataArts!

The links below will help you get more out of our new platform.

Welcome to CDP 2.0
What’s different in the Cultural Data Profile?

Data Migration FAQ
Where are my historical Cultural Data Profiles?
Cultural Data Profile:
A single completed fiscal year, used for grant applications
Customize Your Survey

Select a Year

Each survey covers one fiscal year. Select the end date of the year you would like to work on.

Which Fiscal Year do you want to work on?

- Select Fiscal Year -

Fiscal Year Length

- 12 Months
- Other

Fiscal Year End Date

July 31, YYYY

Click here to change your fiscal year end date.

Back to dashboard

Next
Customize Your FY 2017 Survey

Total Expenses

Information will not be saved until you have completed all the questions required to customize your survey.

DataArts recognizes that cultural nonprofits come in all sizes; we seek to meet the needs of even the smallest organizations.

Are your total expenses less than $50,000?  

☐ Yes  ☐ No

Back  Next

2017 DataArts, All Rights Reserved. | Terms of Service and Privacy Policy
Customize Your FY 2017 Survey

Financial Information Part 1

Information will not be saved until you have completed all the questions required to customize your survey.

Do you have a completed audit or review for 2017?  
- Yes  
- No

Did you have temporarily or permanently restricted contributions, grants, in-kind, or investment revenue?  
- Yes  
- No

Did you have temporarily or permanently restricted earned revenue (this is rare)?  
- Yes  
- No
Customize Your FY 2017 Survey

Financial Information Part 1

Information will not be saved until you have completed all the questions required to customize your survey.

- Do you have a completed audit or review for 2017?  
  - Yes  
  - No

- Did you have temporarily or permanently restricted contributions, grants, in-kind, or investment revenue?  
  - Yes  
  - No

- Did you have temporarily or permanently restricted earned revenue (this is rare)?  
  - Yes  
  - No

Back  

Next
Customize Your FY 2017 Survey

Program Activity

Information will not be saved until you have completed all the questions required to customize your survey.

Based on the NTEE and NISP codes you selected, we have identified some program activities that your organization may engage in.

Select all activities that apply.

- Circulating works
- Developing works
- Commissioning works
- Publishing books or periodicals
Customize Your FY 2017 Survey

Program Activity

Information will not be saved until you have completed all the questions required to customize your survey.

Based on the NTEE and NISP codes you selected, we have identified some program activities that your organization may engage in.

Select all activities that apply.

- Circulating works
- Developing works
- Commissioning works
- Publishing books or periodicals

Did we miss anything?

Select all activities that apply.

- Advocacy
- Broadcasting
- Competitions
- Conferences
- Exhibits
- Field trips
- Financing
- Grant making
- Arts education
- Classes, lectures, or professional development
- Conducting research
- Consulting or fee-for-service work
- Festivals, fairs, parades or community events
- Film screenings
- Fiscal sponsorship
- Guided tours
Your Surveys

FY 2017 Cultural Data Profile

Find Grants

Find your grantmakers and submit data for an upcoming deadline, or search for new grant opportunities.

Type search terms here...

Start a survey

Welcome to DataArts!

The links below will help you get more out of our new platform.

Welcome to CDP 2.0
What's different in the Cultural Data Profile?

Data Migration FAQ
Where are my historical Cultural Data Profiles?

New User Overview
How do I get started?
Financial Totals: Audit/Review*

From your finalized, board-approved audit or independent auditor's review, complete the following. The amounts entered in this section will be used to ensure the accuracy of your financial data in other sections of the Data Profile. This section is required.

<table>
<thead>
<tr>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Assets</td>
</tr>
<tr>
<td>Total Liabilities and Net Assets</td>
</tr>
<tr>
<td>Net Assets - Unrestricted</td>
</tr>
<tr>
<td>Net Assets - Temporarily Restricted</td>
</tr>
</tbody>
</table>
## Revenue: Earned Revenue

<table>
<thead>
<tr>
<th>Source</th>
<th>Unrestricted</th>
<th>Total 2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Food and Concessions Revenue</td>
<td>0.00</td>
<td></td>
</tr>
<tr>
<td>Gift Shop and Merchandise Sales</td>
<td>0.00</td>
<td></td>
</tr>
<tr>
<td>Parking Fees</td>
<td>0.00</td>
<td></td>
</tr>
<tr>
<td>Advertising Revenue</td>
<td>0.00</td>
<td></td>
</tr>
<tr>
<td>Sponsorship Revenue</td>
<td>0.00</td>
<td></td>
</tr>
<tr>
<td>Media Subscription Revenue</td>
<td>0.00</td>
<td></td>
</tr>
</tbody>
</table>
Revenue: Contributed Revenue*

### Trustee/Board Contributions

Contributions from corporations or foundations affiliated with board members should not be included here unless they are from a board member's family foundation.

<table>
<thead>
<tr>
<th></th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unrestricted</td>
<td></td>
</tr>
<tr>
<td>Temporarily Restricted</td>
<td></td>
</tr>
<tr>
<td>Permanently Restricted</td>
<td></td>
</tr>
</tbody>
</table>

Total: $0.00
<table>
<thead>
<tr>
<th>Section</th>
<th>Amount1</th>
<th>Amount2</th>
<th>Amount3</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Federal Government Contributions</td>
<td></td>
<td></td>
<td></td>
<td>$0.00</td>
</tr>
<tr>
<td>Tribal Contributions</td>
<td></td>
<td></td>
<td></td>
<td>$0.00</td>
</tr>
<tr>
<td>Total Government Contributions</td>
<td>$148,294.00</td>
<td>N/A</td>
<td>N/A</td>
<td>$148,294.00</td>
</tr>
<tr>
<td>In-Kind Contributions</td>
<td>$31,852</td>
<td></td>
<td></td>
<td>$31,852.00</td>
</tr>
<tr>
<td>Other Contributions</td>
<td>$330,598</td>
<td></td>
<td></td>
<td>$330,598.00</td>
</tr>
<tr>
<td>Other Contributions Description</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Net Assets Released from Restriction</td>
<td></td>
<td></td>
<td></td>
<td>$0.00</td>
</tr>
<tr>
<td>Total Contributed Revenue - Operating</td>
<td>$1,177,591.00</td>
<td>$50,000.00</td>
<td>$100,000.00</td>
<td>$1,327,591.00</td>
</tr>
</tbody>
</table>

2017

- **Is any of your contributed revenue from special events? (Required)**
  - Yes
  - No

- **Are you in the middle of a capital campaign? (Required)**
  - Yes
  - No

Finished with Revenue: Contributed Revenue? Click to move on to Revenue: -- In-kind Revenue Details. Your changes have been saved automatically.
## Revenue: Summary

<table>
<thead>
<tr>
<th></th>
<th>Unrestricted</th>
<th>Temporarily Restricted</th>
<th>Permanently Restricted</th>
<th>Total 2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contributed Revenue</td>
<td>$1,251,520.00</td>
<td>-$23,929.00</td>
<td>$100,000.00</td>
<td>$1,327,591.00</td>
</tr>
<tr>
<td>Earned Revenue</td>
<td>$338,344.00</td>
<td></td>
<td></td>
<td>$338,344.00</td>
</tr>
<tr>
<td>Investment Revenue</td>
<td>$26,793.00</td>
<td>N/A</td>
<td>N/A</td>
<td>$26,793.00</td>
</tr>
<tr>
<td>Total Operating Revenue</td>
<td>$1,616,657.00</td>
<td>-$23,929.00</td>
<td>$100,000.00</td>
<td>$1,692,728.00</td>
</tr>
</tbody>
</table>

Prior Period Adjustments: $0.00
Program Activity: Book Publishing

Your organization produced and/or distributed printed works that included paper and e-books, magazines, newspapers, and their online equivalents. Please be sure to enter the number of physical and digital books below. To remove this section from your survey, choose Organizational Info in the left navigation bar to change your survey settings.

Book Publishing Narrative

<table>
<thead>
<tr>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

Est.  Total 2017
FY 2017 Cultural Data Profile

Changes to your Data Profile
We've added a Financial Totals section to ensure the accuracy of your data. Read more.

Fifth Street Press

Review and Complete: Complete Survey

<table>
<thead>
<tr>
<th></th>
<th>Unrestricted</th>
<th>Temporarily Restricted</th>
<th>Permanently Restricted</th>
<th>Total 2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Revenue</td>
<td>$1,616,657.00</td>
<td>-$23,929.00</td>
<td>$100,000.00</td>
<td>$1,692,728.00</td>
</tr>
<tr>
<td>Total Expenses</td>
<td>$1,472,228.00</td>
<td></td>
<td></td>
<td>$1,472,228.00</td>
</tr>
<tr>
<td>Total Change in Net Assets</td>
<td>$144,429.00</td>
<td>-$23,929.00</td>
<td>$100,000.00</td>
<td>$220,500.00</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>Unrestricted</th>
<th>Temporarily Restricted</th>
<th>Permanently Restricted</th>
<th>Total 2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Assets</td>
<td>$2,963,306.00</td>
<td>$110,829.00</td>
<td>$100,000.00</td>
<td>$3,174,135.00</td>
</tr>
<tr>
<td>Total Liabilities</td>
<td>$532,929.00</td>
<td>N/A</td>
<td>N/A</td>
<td>$532,929.00</td>
</tr>
</tbody>
</table>
Error Check

The error check scans each section of your Data Profile for any potential discrepancies before you use it for reports. It will take a few minutes to review your data, so sit tight while we prepare a list of potential errors and warnings.

Errors must be addressed before you will be able to complete the survey.

Warnings should be reviewed, but you will be able to complete your survey if you choose not to address them.

Revenue

- 100% complete No errors

Expenses

- 100% complete 1 error/0 warnings

Balance Sheet

- 100% complete No errors

Program Activity

- 100% complete No errors

Cancel
Errors and Warnings

- Enter the number of independent contractors.

Number of singers in the chorus
(Required)

Number of board members who are singers in the chorus

Finished with Chorus Operations Survey: 2016-17 Season: About Your Chorus? Click to move on to Chorus Operations Survey: 2016-17 Season: Productions and Performances Details. Your changes have been saved automatically.
## Expenses: Workforce (Staff, Board and Volunteers)

<table>
<thead>
<tr>
<th>Personnel Expenses*</th>
<th>Non-Personnel Expenses</th>
<th>Summary*</th>
<th>Change in Net Assets</th>
</tr>
</thead>
<tbody>
<tr>
<td>Payments to Artists and Performers</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Full-Time Permanent Employees
- Number of People: 5
- Estimated: [ ]
- Total 2016: [ ]

### Full-Time Seasonal Employees
- Number of People: [ ]
- Estimated: [ ]
- Hours Worked Per Year: [ ]
- Estimated FTE: [ ]
- Total 2016: [ ]

### Part-Time Permanent Employees
- Number of People: 7
- Estimated: [ ]
- Total 2016: [ ]

### Part-Time Seasonal Employees
- Number of People: 14
- Estimated: [ ]
- Total 2016: [ ]

### Independent Contractors
- Estimated: [ ]

Enter the number of independent contractors.

### Interns and Apprentices
- Estimated: [ ]
- Total 2016: [ ]
## Expenses: Workforce (Staff, Board and Volunteers)

<table>
<thead>
<tr>
<th>Number of People</th>
<th>Est.</th>
<th>Total 2016</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Full-Time Permanent Employees</strong></td>
<td>5</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Number of People</th>
<th>Est.</th>
<th>Hours Worked Per Year</th>
<th>Calculated FTE</th>
<th>Total 2016</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Full-Time Seasonal Employees</strong></td>
<td></td>
<td></td>
<td></td>
<td>N/A</td>
</tr>
<tr>
<td><strong>Part-Time Permanent Employees</strong></td>
<td>7</td>
<td></td>
<td></td>
<td>N/A</td>
</tr>
<tr>
<td><strong>Part-Time Seasonal Employees</strong></td>
<td>14</td>
<td></td>
<td></td>
<td>N/A</td>
</tr>
<tr>
<td><strong>Independent Contractors</strong></td>
<td>23</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Interns and Apprentices</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Expenses: Workforce (Staff, Board and Volunteers)

#### Full-Time Permanent Employees
<table>
<thead>
<tr>
<th>Number of People</th>
<th>Est.</th>
<th>Total 2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>5</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### Full-Time Seasonal Employees
<table>
<thead>
<tr>
<th>Number of People</th>
<th>Hours Worked Per Year</th>
<th>Est.</th>
<th>Calculated FTE</th>
<th>Total 2016</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>N/A</td>
</tr>
</tbody>
</table>

#### Part Time
<table>
<thead>
<tr>
<th>Number of People</th>
<th>Hours Worked Per Year</th>
<th>Est.</th>
<th>Calculated FTE</th>
<th>Total 2016</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>N/A</td>
</tr>
</tbody>
</table>
Survey Completed!

✔ for FY 2017 is complete!

You can still make changes to your survey at any time from your Surveys page.

Dashboard  Funder Reports
Organizations enter:

- Revenue
- Expenses
- Balance Sheet
- Programs
- Attendance
- Ticket Prices
- Workspaces/Locations
- Staffing
- Members/Subscribers
- Contributors
- Constituencies Served
## Expense

### Personnel Expenses
- Employee Salaries
- Payroll Taxes and Fringe Benefits
- Independent Contractors
- Professional Fees

<table>
<thead>
<tr>
<th></th>
<th>Program</th>
<th>Fundraising</th>
<th>General and Administrative</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee Salaries</td>
<td>$</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>Payroll Taxes and Fringe Benefits</td>
<td>$</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>Independent Contractors</td>
<td>$</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>Professional Fees</td>
<td>$</td>
<td>$</td>
<td>$</td>
</tr>
</tbody>
</table>

Do you pay artists directly? (required)
- Yes
- No

*The section below appears if you answer 'Yes' to "Do you pay artists directly?"

### Payments to Artists and Performers
- Visual Artists
- Performing Artists
- Other Artists

<table>
<thead>
<tr>
<th></th>
<th>Visual Artists</th>
<th>Performing Artists</th>
<th>Other Artists</th>
</tr>
</thead>
<tbody>
<tr>
<td>Artists and Performers - Employees</td>
<td>$</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>Artists and Performers - Independent Contractor</td>
<td>$</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>Artists and Performers - Professional Fees</td>
<td>$</td>
<td>$</td>
<td>$</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>Local</th>
<th>Non-Local</th>
</tr>
</thead>
<tbody>
<tr>
<td>Payments to Artists and Performers - Local and Non-Local</td>
<td>$</td>
<td>$</td>
</tr>
</tbody>
</table>

### Non-Personnel Expenses
- Advertising and Promotion
- Conferences and Meetings

<table>
<thead>
<tr>
<th></th>
<th>Program</th>
<th>Fundraising</th>
<th>General and Administrative</th>
</tr>
</thead>
<tbody>
<tr>
<td>Advertising and Promotion</td>
<td>$</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td>Conferences and Meetings</td>
<td>$</td>
<td>$</td>
<td>$</td>
</tr>
</tbody>
</table>
Data comes from:

- Audit/Review 990 Forms
- Quickbooks Statements
- Internal Financials
- Staffing Records
- Ticketing Software
- Attendance Records
- Donor Lists
Customize Your FY 2015 Survey

Total Expenses

Information will not be saved until you have completed all the questions required to customize your survey.

DataArts recognizes that cultural nonprofits come in all sizes; we seek to meet the needs of even the smallest organizations.

Are your total expenses less than $50,000?  ○ Yes  ○ No

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Running Reports
Use the box below to search for grantmakers and grant programs. Click on 'View' and then 'Submit data' to submit your data to a grant program and generate a funder report.

New York City Department of Cultural Affairs

3 results for "New York City Department of Cultural Affairs" with additional filters selected. Refine your search using the filters to the left.

<table>
<thead>
<tr>
<th>Grantmaker</th>
<th>Grant Program</th>
<th>Deadline</th>
<th>Number of Profiles Required</th>
<th>Number of Profiles Suggested</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>New York City Department of Cultural Affairs</td>
<td>Capital Funding Request</td>
<td></td>
<td>2</td>
<td>2</td>
<td>View</td>
</tr>
<tr>
<td>New York City Department of Cultural Affairs</td>
<td>Cultural Development Fund (CDF)</td>
<td>2/12/18</td>
<td>1</td>
<td>3</td>
<td>View</td>
</tr>
<tr>
<td>New York City Department of Cultural Affairs</td>
<td>Cultural Institutions Group</td>
<td></td>
<td>2</td>
<td>2</td>
<td>View</td>
</tr>
</tbody>
</table>
# Funder Reports and Grants

Use the box below to search for grantmakers and grant programs. Click on 'View' and then 'Submit data' to submit your data to a grant program and generate a funder report.

<table>
<thead>
<tr>
<th>Grantmaker</th>
<th>Grant Program</th>
<th>Deadline</th>
<th>No. Profiles Required</th>
<th>No. Profiles Suggested</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>New York City Department of Cultural Affairs</td>
<td>Capital Funding Request</td>
<td></td>
<td>2</td>
<td>2</td>
<td>View</td>
</tr>
<tr>
<td>New York City Department of Cultural Affairs</td>
<td>Cultural Development Fund (CDF)</td>
<td>2/12/18</td>
<td>1</td>
<td>3</td>
<td>Hide</td>
</tr>
</tbody>
</table>

Region: New York State, Bronx County, Kings County, New York County, Queens County, Richmond County, New York

Requirements:
FY 2016 is required for the Cultural Development Fund. Up to three years of data will be included in this report.

Notes:
CDF guidelines are available [here](#).
# New York City Department of Cultural Affairs Cultural Development Fund

## Organization Information

**Organization name:** Fifth Street Press  
**City:** Philadelphia  
**State:** AK  
**County:** Sitka, City and Borough of  
**NSP Discipline:** 9 - Media Arts  
**NSP Institution:** 12 - Independent Press  
**NTEE:** A33 - Printing & Publishing

| Applicant is audited or reviewed by an independent accounting firm. |  

| **Federal ID #** | 555555555 |  
| **Year organization founded:** | 1975 |  
| **Organization type:** Unincorporated or fiscally sponsored organization |  
| **Fiscal year end date:** | 12-31 |  
| **DUNS #:** |  
| **Full-time staff:** | 14 |  
| **Paid FTEs:** | 14.03 |

## Financial Summary

**Unrestricted Activity**  
**FY 2015**  
**Unrestricted operating revenue**  
**Earned program**  
**Earned non-program**  
**Total earned revenue**  
**Investment revenue**  
**Contributed revenue**
Reporting topics:
Annual Report
Programs and Attendance
Marketing
Fundraising
Balance Sheet

Coming soon:
Financial Activity
Capacity
### Financial Summary

<table>
<thead>
<tr>
<th>Activity</th>
<th>FY 2014</th>
<th>FY 2015</th>
<th>% Change</th>
<th>FY 2016</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unrestricted operating revenue</td>
<td>$75,002</td>
<td>$85,740</td>
<td>-26%</td>
<td>$44,458</td>
<td>-20%</td>
</tr>
<tr>
<td>Earned program</td>
<td>$2,010</td>
<td>$12,063</td>
<td>0%</td>
<td>$4,010</td>
<td>0%</td>
</tr>
<tr>
<td>Total earned revenue</td>
<td>$77,012</td>
<td>$87,803</td>
<td>-22%</td>
<td>$48,468</td>
<td>-20%</td>
</tr>
<tr>
<td>Investment revenue</td>
<td>$6,885</td>
<td>$9,539</td>
<td>-20%</td>
<td>$2,765</td>
<td>-52%</td>
</tr>
<tr>
<td>Contributed revenue</td>
<td>$216,769</td>
<td>$240,790</td>
<td>16%</td>
<td>$321,916</td>
<td>28%</td>
</tr>
<tr>
<td>Total unrestricted operating revenue</td>
<td>$399,796</td>
<td>$433,991</td>
<td>-4%</td>
<td>$379,237</td>
<td>17%</td>
</tr>
</tbody>
</table>

**Operating expenses**
- Program: $243,394, $242,972 (1%) $238,597 (4%)
- Fundraising: $39,120, $55,057 (40% $85,038 (55%)
- General & administrative: $91,726, $114,461 (7% $106,640 (8%)
- Total operating expenses: $374,240, $412,490 (6% $423,272 (3%)
- Net unrestricted activity - Operating: $19,000 (11% $44,636 (51%)
- Net unrestricted activity - Operating: $19,000 (11% $44,636 (51%)
- Total net unrestricted activity: $19,000 (11% $44,636 (51%)
- Net temporarily restricted activity: $22,380, $13,794 (26%) $0 (100%)
- Total net activity: $41,307, $31,295 (12%) $44,636 (43%)

### Revenue by Source

- Earned
- Investment
- Contributions

### Expenses by Functional Grouping

- Program
- General & Administrative
- Fundraising

### Attendance

<table>
<thead>
<tr>
<th>Category</th>
<th>FY 2014</th>
<th>FY 2015</th>
<th>% Change</th>
<th>FY 2016</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>In-person Participation</td>
<td>1,870</td>
<td>0</td>
<td>-100%</td>
<td>0</td>
<td>n/a</td>
</tr>
<tr>
<td>In-person participation - kids</td>
<td>0</td>
<td>0</td>
<td>n/a</td>
<td>0</td>
<td>n/a</td>
</tr>
<tr>
<td>Total in-person participation</td>
<td>1,870</td>
<td>0</td>
<td>-100%</td>
<td>0</td>
<td>n/a</td>
</tr>
</tbody>
</table>

### Types of In-person Attendance

- Performance tickets: 1,205, -100% n/a
- Registrants for classes/workshops: 665, -100% n/a

### Attendance Ages

- Children (8 and under): 89, -100% n/a
- Seniors: 89, -100% n/a
- Adults: 1,012, -100% n/a

### Other Participation

<table>
<thead>
<tr>
<th>FY 2014</th>
<th>FY 2015</th>
<th>% Change</th>
<th>FY 2016</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>47</td>
<td></td>
<td></td>
<td>47</td>
<td></td>
</tr>
</tbody>
</table>
# Financial Summary

<table>
<thead>
<tr>
<th>Unrestricted Activity</th>
<th>FY 2014</th>
<th>FY 2015</th>
<th>% Change</th>
<th>FY 2016</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unrestricted operating revenue</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Earned program</td>
<td>$75,002</td>
<td>$55,760</td>
<td>-26%</td>
<td>$44,458</td>
<td>-20%</td>
</tr>
<tr>
<td>Earned non-program</td>
<td>$12,030</td>
<td>$12,062</td>
<td>0%</td>
<td>$11,089</td>
<td>-8%</td>
</tr>
<tr>
<td>Total earned revenue</td>
<td>$87,032</td>
<td>$67,822</td>
<td>-22%</td>
<td>$55,547</td>
<td>-18%</td>
</tr>
<tr>
<td>Investment revenue</td>
<td>$6,895</td>
<td>$5,519</td>
<td>-20%</td>
<td>$2,765</td>
<td>-50%</td>
</tr>
<tr>
<td>Contributed revenue</td>
<td>$215,789</td>
<td>$249,750</td>
<td>16%</td>
<td>$320,915</td>
<td>28%</td>
</tr>
<tr>
<td>Total unrestricted operating revenue</td>
<td>$309,716</td>
<td>$323,091</td>
<td>4%</td>
<td>$379,227</td>
<td>17%</td>
</tr>
<tr>
<td>Operating expenses</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Program</td>
<td>$243,974</td>
<td>$242,572</td>
<td>-1%</td>
<td>$231,997</td>
<td>-4%</td>
</tr>
<tr>
<td>Fundraising</td>
<td>$39,320</td>
<td>$55,057</td>
<td>40%</td>
<td>$85,125</td>
<td>55%</td>
</tr>
<tr>
<td>General &amp; administrative</td>
<td>$107,826</td>
<td>$115,461</td>
<td>7%</td>
<td>$106,640</td>
<td>-8%</td>
</tr>
<tr>
<td>Total operating expenses</td>
<td>$391,120</td>
<td>$413,090</td>
<td>6%</td>
<td>$423,762</td>
<td>3%</td>
</tr>
<tr>
<td>Net unrestricted activity - Operating</td>
<td>-$81,404</td>
<td>-$89,999</td>
<td>-11%</td>
<td>-$44,535</td>
<td>51%</td>
</tr>
<tr>
<td>Net unrestricted activity - Non-operating</td>
<td>n/a</td>
<td>n/a</td>
<td></td>
<td>n/a</td>
<td></td>
</tr>
<tr>
<td>Total net unrestricted activity</td>
<td>-$81,404</td>
<td>-$89,999</td>
<td>-11%</td>
<td>-$44,535</td>
<td>51%</td>
</tr>
<tr>
<td>Net temporarily restricted activity</td>
<td>-$59,148</td>
<td>$45,000</td>
<td>176%</td>
<td>$50,000</td>
<td>11%</td>
</tr>
<tr>
<td>Net permanently restricted activity</td>
<td>$22,580</td>
<td>$13,794</td>
<td>-39%</td>
<td>$11,598</td>
<td>16%</td>
</tr>
<tr>
<td>Net total activity</td>
<td>-$117,972</td>
<td>-$31,205</td>
<td>74%</td>
<td>-$44,535</td>
<td>43%</td>
</tr>
</tbody>
</table>

# Revenue by Source

- Earned: 28%
- Investment: 21%
- Contributed: 71%

- 2% of the earned revenue is from investment.
- 15% of the contributed revenue is from earned.
- 84% of the contributed revenue is from investment.
- 77% of the contributed revenue is from earned.
Fundraising Comparison Report FY 2016

This report looks at all development activity and includes all contributions whether unrestricted, temporarily restricted, or permanently restricted, operating or non-operating. Fundraising expenses will include capital campaign expenses if an organization is conducting a capital campaign.

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Total contributed revenue (includes operating and non-operating revenue)</td>
<td>$318,945</td>
<td>$275,056</td>
<td>$290,288</td>
<td>$214,043</td>
<td></td>
</tr>
<tr>
<td>Total fundraising expense (includes operating and non-operating expenses)</td>
<td>$90,825</td>
<td>$24,790</td>
<td>$17,144</td>
<td>$6,875</td>
<td></td>
</tr>
<tr>
<td>Net Contributed Revenue</td>
<td>$227,990</td>
<td>$250,266</td>
<td>$273,144</td>
<td>$207,168</td>
<td></td>
</tr>
</tbody>
</table>

Fundraising expense as a % of total contributions shows how much you are spending to generate contributed revenue. Fundraising expense as a % of total expense shows what percentage of total expenses you are spending on fundraising efforts. Fundraising efficiency calculates the average dollar amount of contributions raised from each dollar spent on fundraising. Net contributed revenue shows how much an organization received in contributions net of all fundraising costs.

Fundraising Expense Percentages

% of total expense

Your Organization | Comparison Group Average | Comparison Group Median
--- | --- | ---
5% | 3% | 2%
15% | 12% | 10%
25% | 20% | 18%
30% | 25% | 23%
20% | 15% | 14%
5% | 4% | 3%

For any row where fewer than half the organizations in the pool reported data, it is possible for the median value to be blank.
This report looks at all development activity and includes all contributions whether unrestricted, temporarily restricted, or permanently restricted, operating or non-operating. Fundraising expenses will include capital campaign expenses if an organization is conducting a capital campaign.

### Fundraising Activity

<table>
<thead>
<tr>
<th></th>
<th>FY 2016</th>
<th>Comparison Group Average FY 2016</th>
<th>Comparison Group Median* FY 2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total contributed revenue (Includes operating and non-operating revenue)</td>
<td>$320,919</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total fundraising expense</td>
<td>$85,128</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total expenses (Includes non-operating expenses)</td>
<td>$423,762</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Metrics

- **Fundraising expense as a % of total contributions**: 26%
- **Fundraising expense as a % of total expense**: 20%
- **Fundraising Efficiency**: $47,990
- **Net Contributed Revenue**: $235,790

**Fundraising expense as a % of total contributions** shows how much you are spending to generate contributions.

**Fundraising expense as a % of total expense** shows what percentage of total expenses you are spending on fundraising.

**Fundraising efficiency** calculates the average dollar amount of contributions raised from each dollar spent on fundraising.

**Net contributed revenue** shows how much an organization received in contributions net of expenses.

---

### Comparison Criteria:

- Budget Size
- Discipline
- Geography
- Organization Age
- Staffing
- Financial Characteristics

---

### Fundraising Expense Percentages

![Fundraising Expense Percentages Chart]
Data in Action

The Boston Conservatory, Boston, MA. Photo credit: Eric Antoniou
The city has asked the Downtown Arts Center to provide a series of free performances as part of a citywide arts festival.

Program Director must make the case to the board that this is a good opportunity and worth the financial risk.
# Downtown Arts Center

## Fundraising Trend Report

This report looks at all development activity and includes all contributions, whether restricted, temporarily restricted, or permanently restricted, operating or non-operating. Fundraising expenses will include capital campaign expenses if an organization is conducting a capital campaign. The table shows percentage changes from one year to the next as contributed or restricted by special fundraising activities.

<table>
<thead>
<tr>
<th></th>
<th>FY 2012</th>
<th>FY 2013</th>
<th>% Change</th>
<th>FY 2014</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total contributed revenue</td>
<td>$401,816</td>
<td>$448,630</td>
<td>12%</td>
<td>$508,244</td>
<td>13%</td>
</tr>
<tr>
<td>Total fundraising expense</td>
<td>$10,871</td>
<td>$15,078</td>
<td>39%</td>
<td>$16,278</td>
<td>3%</td>
</tr>
<tr>
<td>Total expenses</td>
<td>$420,786</td>
<td>$409,608</td>
<td></td>
<td>$474,522</td>
<td></td>
</tr>
</tbody>
</table>

### Fundraising Expense as a % of Total Contribution:

- **Fundraising Expense as a % of Total Contributions**: 3%
- **Fundraising Expense as a % of Total Expense**: 3%
- **Fundraising Efficiency**: $37, $30, $31
- **Net Contributed Revenue**: $390,945, $433,552, $507,507

**Fundraising Expense as a % of Total Contributions** shows how much you are spending to generate contributed revenue.

**Fundraising Expense as a % of Total Expense** shows what percentage of total expenses you are spending on fundraising efforts.

**Fundraising Efficiency** calculates the average dollar amount of contributions raised from each dollar spent on fundraising.

**Net Contributed Revenue** shows how much an organization received in contributions net of all fundraising costs.
Balance Sheet Trend report

The tables below show trends in the balance sheet. The accompanying table and graphs look at the components of the balance sheet that can help you track your financial position with different measures.

<table>
<thead>
<tr>
<th>Assets</th>
<th>FY 2012</th>
<th>FY 2013</th>
<th>% Change</th>
<th>FY 2014</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current Assets</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cash</td>
<td>88,680</td>
<td>139,466</td>
<td>57%</td>
<td>281,194</td>
<td>102%</td>
</tr>
<tr>
<td>Receivables</td>
<td>0</td>
<td>0</td>
<td>n/a</td>
<td>2,500</td>
<td>n/a</td>
</tr>
<tr>
<td>Investments</td>
<td>101,981</td>
<td>135,129</td>
<td>33%</td>
<td>54,287</td>
<td>-60%</td>
</tr>
<tr>
<td>Prepaid expenses &amp; other</td>
<td>0</td>
<td>0</td>
<td>n/a</td>
<td>0</td>
<td>n/a</td>
</tr>
<tr>
<td>Total Current Assets</td>
<td>190,661</td>
<td>274,595</td>
<td>44%</td>
<td>337,981</td>
<td>23%</td>
</tr>
</tbody>
</table>

The table below shows several key measures of financial position. Reviewing these measures against total expenses illustrates whether these resources are keeping pace with budget growth. The graph below illustrates these net asset components.

<table>
<thead>
<tr>
<th>Financial Position</th>
<th>FY 2012</th>
<th>FY 2013</th>
<th>% Change</th>
<th>FY 2014</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Net assets as a % of total expenses</td>
<td>41%</td>
<td>62%</td>
<td>49%</td>
<td>68%</td>
<td>26%</td>
</tr>
<tr>
<td>Total working capital</td>
<td>171,561</td>
<td>255,594</td>
<td></td>
<td>323,144</td>
<td></td>
</tr>
<tr>
<td>Fixed assets (net)</td>
<td>0</td>
<td>0</td>
<td>n/a</td>
<td>0</td>
<td>n/a</td>
</tr>
<tr>
<td>Total endowment and reserves</td>
<td>0</td>
<td>0</td>
<td></td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>Total debt</td>
<td>0</td>
<td>0</td>
<td></td>
<td>0</td>
<td></td>
</tr>
</tbody>
</table>
**Make a Projection**

**Coming in February 2018**

**Contribution Details**

Enter a projection for this fiscal year, then add another year.

Read more about calculating projections.

<table>
<thead>
<tr>
<th>Category</th>
<th>2016</th>
<th>2018</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Foundation</td>
<td>$54,940</td>
<td>$45,899</td>
<td></td>
</tr>
<tr>
<td>Government</td>
<td>$19,600</td>
<td>$12,654</td>
<td></td>
</tr>
<tr>
<td>In-Kind Donations</td>
<td>$0</td>
<td>$0</td>
<td></td>
</tr>
<tr>
<td>Individual</td>
<td>$32,884</td>
<td>$45,689</td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td>$0</td>
<td>$0</td>
<td></td>
</tr>
<tr>
<td>Parent Organization Support</td>
<td>$0</td>
<td>$0</td>
<td></td>
</tr>
<tr>
<td>Tribal</td>
<td>$0</td>
<td>$0</td>
<td></td>
</tr>
<tr>
<td>Trustee and Board</td>
<td>$4,578</td>
<td>$6,578</td>
<td></td>
</tr>
</tbody>
</table>

Totals: $112,002 $110,820

Reset Notes and Values
Copy Last Years' Data

Start Over

Personalize and Download
DataArts User Stories

Rhode Island Historical Society, Providence, RI. Photo credit: Rhode Island Historical Society & Gage Prentiss.
DataArts reports were a lifesaver. [They] helped us use the language of finance to build a bridge between the world of business and the world of nonprofit museums.

C. Morgan Grefe
Executive Director
“I knew we had succeeded when there were no questions about our financial status or reports at the end of one of our Board meetings. For me, it was the first time a budget presentation ended with a round of applause!”

C. Morgan Grefe
Founding Director
THE ARTS FACTOR

Measurable impact. Boundless possibilities.

THE POWER OF MUSIC

What started in 1997 as a summer songwriting program for youth has grown into a nationally recognized, neighborhood-based cultural center — and a perfect example of how arts and culture empower and transform communities.

ZUMIX engages East Boston’s large Hispanic/Latino and immigrant populations in music-based educational programs and community events. Through after-school and summer programming as well as in-school partnerships, the program serves more than 2,000 youth per year. An additional 15,000 visits, children, and families attend ZUMIX-sponsored community events and festivals in the ZUMIX Firehouse and throughout the East Boston community.

ZUMIX has given residents of East Boston a place to make their voices heard while creating a new cultural destination in one of Boston’s most distinctive neighborhoods. In 2001, the White House awarded ZUMIX the National Arts and Humanities Youth Programs Award, our nation’s highest honor for youth arts programs.
“These numbers show up all the time at city hall, as context to understand the sector. There’s a feeling of excitement in Boston now, and ArtsFactor helped to coalesce and gel the story of impact and possibility.”

John Beck
Deputy Director
ArtsBoston, Boston, MA
Other Resources

The Other Theatre Company, Chicago, IL. Photo credit: Carin Silkaitis
Your KIPI Dashboard from the National Center for Arts Research

The NCAR KIPI Dashboard is powered by your DataArts Cultural Data Profile information and is a free tool to inform strategic decisions and help arts managers assess their organizations’ health and sustainability.

Click on the KIPI scores below to see how your organization’s performance in nine finance and operations categories compares to that of similar organizations nationally. You can access confidential and individual scores in the categories of contributed revenue, earned revenue, expenses, marketing impact, bottom line, balance sheet, community engagement, program activity and staffing.

Return on Fundraising
The Return on Fundraising KIPI score shows your organization’s performance relative to organizations like yours nationally on how much total contributed revenue you bring in for every dollar spent on fundraising.

Investment in Program
The Investment in Program KIPI score shows your organization’s performance relative to organizations like yours nationally on the amount of total expenses invested in direct program expenses (includes personnel, production materials, etc.).

Earned Revenue
The Earned Revenue KIPI score shows your organization’s relative performance on the percentage of total expenses covered by earned revenue.
Balance sheet, community engagement, program activity and staffing.

**Return on Fundraising**

The Return on Fundraising KPI score shows your organization's performance relative to organizations like yours nationally on how much total contributed revenue you bring in for every dollar spent on fundraising.

Your Return on Fundraising KPI Score

- 2011: 64
- 2012: 52
- 2013: 58
- 2014: 70
- 2015: 92

See Your NCAR KIPIS Scores

---

**Investment in Program**

The Investment in Program KPI score shows your organization's performance relative to organizations like yours nationally on the amount of total expenses invested in direct program expenses (includes personnel, production materials, etc.)

Your Investment in Program KPI Score

- 2011: 81
- 2012: 87
- 2013: 93
- 2014: 92
- 2015: 95

See Your NCAR KIPIS Scores

---

**Earned Revenue**

The Earned Revenue KPI score shows your organization's relative performance on the percentage of total expenses covered by earned revenue.

Your Earned Revenue KPI Score

- 2011: 83
- 2012: 73
- 2013: 64
- 2014: 61
- 2015: 71

See Your NCAR KIPIS Scores

---

Things to Keep in Mind about KIPIs:

- KIPIs range from 0-100, with 100 being the highest outcome an organization can achieve, based on a level playing field.
- Scoring high may indicate that you are achieving your objectives, or you may want a low score on some KIPIs given your priorities (e.g., you strive for accessibility, not program revenue).
- Organizations do not prioritize every performance outcome. You decide what's important.
- KIPIs are not prescriptive. They show where you are. You decide where you want to be.

The NCAR KIPIS Dashboard was developed by our research partners at the National Center for Arts Research at Southern Methodist University.
http://courses.culturaldata.org
Available Courses

**Looking as We Leap: Data for Decisions**
Learn a five-step decision-making process helps 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.
http://culturaldata.org/learn

<table>
<thead>
<tr>
<th>SUN</th>
<th>MON</th>
<th>TUE</th>
<th>WED</th>
</tr>
</thead>
<tbody>
<tr>
<td>3</td>
<td>4</td>
<td>5</td>
<td>6</td>
</tr>
<tr>
<td>Orientation to the New CDP Platform - Webinar (July 5 @ 10:00 AM ET)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(10:00 AM - 11:00 AM) Hosted by DataArts @ Online</td>
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<td>Orientation to the New CDP Platform - Webinar (July 5 @ 1:00 PM ET)</td>
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Monthly Webinars
Learning Breaks
In-person Orientations & Workshops
Questions?
Thank you

Support Center
9am – 8pm ET, Monday – Friday
877-707-DATA (877-707-3282)
help@culturaldata.org
Cultural Data Profile Changes

- Customized data collection
- Streamlined sections
- New sections and lines
Cultural Data Profile Changes

51

Expense line items
Cultural Data Profile Changes

51
Expense line items

25
Expense questions