SMU DataArts Cultural Data Profile (CDP)
Operating Grant Cycle 2024 (GC24)

What is SMU DataArts?
SMU DataArts' mission is to empower arts and cultural leaders with high-quality data and evidence-based resources and insights that help them to overcome challenges and increase impact.

SMU DataArts' flagship service is the Cultural Data Profile (CDP), which is an online survey that arts, culture, and humanities nonprofits update annually to share and analyze organizational information in a standardized format, all in one safe, secure place. By entering financial, programmatic, and operational data into an online form called the Cultural Data Profile (CDP), organizations can then produce a variety of reports designed to help increase management capacity, identify strengths and challenges and inform decision-making.

Bravo Greater Des Moines pays for this service so arts, culture, and heritage nonprofits in Greater Des Moines can be visible at a national level. Bravo also uses the CDP in its application process. As an applicant to Bravo's operating grant programs, you may be required to generate a Funder Report with Bravo as the recipient and upload a Streamlined Funder Report to your organization's operating grant application.

Who must complete a CDP and download a Funder Report?
Organizations with annual operating budgets greater than $200K with at least one full-time employee or equivalent must complete CDPs corresponding to their three (3) most recently completed fiscal years. Once the profiles are complete, users will be asked to attach a PDF of their *Streamlined Funder Report* to their operating grant application. Applicants will be asked to reflect on this report and their past financial history to demonstrate their awareness of decisions on sustainable operations. *Please note that organizations with annual operating budgets greater than $1 million must use information from audited financials.

Organizations with annual operating budgets less than $200K are strongly encouraged to complete a CDP corresponding to their most recently completed fiscal year.

<u>**How to Get Started & Complete the Cultural Data Profile:**</u>

1. Refer to In-depth Guides to help you understand what will be asked. Select the link that best fits your organization size:
- CDP for un-audited organizations -For those with expenses over $50,000 annually who do not receive an audit or review from an outside accounting firm   PDF Download | PDF en español
- CDP for audited organizations – For those who receive an audit or review from an outside accounting firm PDF Download | PDF en español

2. Gather your organization's financial and program data.
- This includes the organization's financial audit/review or year-end financial statements for your organization's most recently completed fiscal year.
- If the organization is NOT audited/reviewed, you'll collect data based on board-approved year-end financial statements.
- If your organization is a department within a larger institution, enter data based on internal financial statements of your specific department, and indicate that you have a parent organization when selecting your organization type on the Customize Your Survey screen.

- Do NOT enter project budgets, budgets for future years, or data from incomplete or not-yet-approved audits/reviews/financial statements.

3. Log into your Cultural Data Profile (CDP) on the SMU DataArts website.
- Existing Users: Log into your organization's account.
- New Users: Go to http://www.culturaldata.org and click on Get Started.
- Need help?
  - Forgot your username or password? Have questions about the CDP? Contact the SMU DataArts Support Center, available Monday – Friday from 9:30 am - 6:00 pm CST. Call Toll Free: 1-877-707-3282 or Email: help@culturaldata.org
  - Refer to CDP Resources and FAQs or use the Searchable Knowledgebase

4. Create and Complete your Data Profile (CDP).
- Create and complete a Cultural Data Profile (CDP) for fiscal year 2022 (FY22) or your organization's most recently completed fiscal year.
- **New:** Bravo is requiring your organization to fully utilize the narrative spaces in each CDP section to explain your data – especially when there are major variances and changes.
- Multiple individuals may work on an organization's profile. There will be one main administrator and others can set up individual accounts and request access to the organization profile. To prevent data loss, avoid having people work on the CDP at the same time.
- The SMU DataArts' system includes an automatic error check. Any sections with errors will be marked with a red exclamation point symbol. You will need to resolve these sections before you can officially complete your CDP, so please reach out to SMU DataArts with any questions.
- When you are finished entering data and all errors have been addressed, the Complete button on the page will turn orange.
- Click the orange Complete button. This "locks" your CDP which allows you to generate a PDF of the full Funder Report.

5. Generate the Bravo Funder Report and get to know your data. Once the Data Profile(s) are in "Complete" status:
- Log into your account on SMU DataArts.
- Go to the Funder Reports and Grants section (you'll see the link at the top of the page in your dashboard).
- Use the search bar to select Bravo Greater Des Moines as the Funder.
- Locate and select the appropriate report.
- Click on *View* in the Details column.
- Click on *Generate Report*.
- Confirm the most recent fiscal year in the dropdown field.
- Follow the instructions to generate your report.
- Bravo will then have access to your full funder report, so you do not need to email the report to Bravo.
- The Funder Report will pull up to three (3) years of data to show trends and variances. We recommend organizations review all existing Data Profiles and make sure they are accurate and have "Complete" status.

6. Edit, Save, Print and Upload the Bravo Streamlined Funder Report for your grant application:
- Once your CDP survey is complete, it will appear complete in your dashboard. To edit or print the CDP survey to save for your records, click "Actions" in the dashboard.
- To upload a Streamlined Funder Report with Bravo's Operating Grant Application, follow the instructions above and select *Generate Streamlined Funder Report*. This is a summary of the full Funder's Report that directly relates to your organization's past financial performance, and it is easier to read for panelists.

- The *Streamlined Funder Report* will be used to evaluate your recent financial history and sustainability and will only include these sections: Organizational Info; Financial Summary; Revenue Details & Narrative; Expense Details & Narrative; Contributions; Balance Sheet Details & Narrative; Workforce; and Attendance.
- Save the Bravo *Streamlined Funder Report* as a PDF for your files. Now, you are ready to upload it to your Operating Grant application. Refer to the application for more detailed instructions.
- **NOTE:** Be sure to include the Streamlined Funder Report with your grant application and NOT the PDF of the entire CDP or full Funder's Report.

7. Explain Variances.
- As a part of Bravo's Operating Grant application, you will be asked to provide additional explanation to help panelists better understand how your attendance, program, or financial data connects to your application.
- Your application, including the Streamlined Funder Report, should tell a consistent story. You can use this space to call out trends, themes or line items that support your application. Or, you may want to clarify any areas that are potentially confusing, contradictory, or could leave panelists with unanswered questions.
- Don't make panelists guess what the variances in your CDP data might mean. Bring the data to life and give the panelists the information they need. For example, if your organization participated in a one-year-only children's music series, your *Streamlined Funder Report* might show a substantial difference in children's attendance and expenses from one year to the next. Use this narrative section in both the CDP and in the application to explain.

8. Questions? For additional information about completing the data profile, contact:
- SMU DataArts Help Desk is open Monday through Friday, from 9:30 am – 6 pm CST.
- Email: help@culturaldata.org or Call: 1-877-707-3282

For additional information about uploading the report or how panelists will use the information, please contact Bravo staff at grants@bravogreaterdesmoines.org or call 515-243-0388.