VERMONT CULTURAL DATA PROJECT

August 1, 2011

The launch of the Vermont Cultural Data Project has been made possible through the leadership of:

Vermont Arts Council

The Vermont Community Foundation

Additional support has been provided by:

The Kresge Foundation

Dear Arts and Cultural Colleagues,

We are pleased to announce the launch of the Vermont Cultural Data Project (Vermont CDP), the first online, financial, programmatic and operational management tool of its kind for arts and cultural organizations. This unique system will provide your organization with the tools necessary to analyze and benchmark your financial and organizational data, all at no cash cost to you, courtesy of the Vermont Arts Council and The Vermont Community Foundation.

What is the Vermont CDP?

The Vermont CDP is a user-friendly online system for reporting historical organizational and financial data, which can be used by both large and small organizations. Once each year, you will enter your financial, programmatic and operational data, and the system will enable you to run reports on your organization easily throughout the year. You can use these reports as one part of the grant application process to partnering funders and to make your case to board members, potential donors, advocates and policymakers.

The Vermont CDP is the result of a collaborative partnership of public and private funders committed to strengthening the arts and cultural sector. Quickly becoming a national model, the CDP started in Pennsylvania in 2004 and has since expanded to Arizona, California, Illinois, Maryland, Massachusetts, Michigan, New York State, Ohio and Rhode Island.

Why should my organization participate?

After completing the online form annually, you will have access to CDP's powerful reporting tools, which will allow you to generate instant annual reports, view programmatic and financial trends, benchmark your performance against other organizations and share reports with trustees and staff. Through these different reports, your data will help you tell your organization's story.

By participating in the Vermont CDP, you will allow the arts community as a whole to better articulate and provide evidence of the sector's assets and needs, as well as its contributions to the state and the country. Data from the CDP has been used in several major reports, including Arts and Economic Prosperity III, a report by Americans for the Arts, and *Portfolio*, a report by the Greater Philadelphia Cultural Alliance using analysis by the Economy League of Greater Philadelphia. In Philadelphia, *Portfolio's* findings were cited by city council members and used to support the passage of a city bond that provided

OPERATED BY THE PEW CHARITABLE TRUSTS

2005 MARKET STREET, SUITE 1700, PHILADELPHIA, PA 19103-7077
TOLL FREE 855-708-8237 (855-70-VTCDP)   FAX 215.575.4888   www.vtculturaldata.org

$72 million for capital projects being undertaken by the city's arts and cultural organizations. By clearly demonstrating the impact of the arts on the region, the report's findings led to increased funding for the city's grant program and the reopening of the shuttered Office of Arts, Culture and Creative Economy.

You will also be able to generate reports to be submitted to grantmakers with the click of a button. Two funders in Vermont have agreed to accept this core set of organizational financial, programmatic and operational data as part of their grant application processes.

How will the Vermont CDP support me throughout this process?

The Vermont CDP will provide statewide on-location workshops and online orientation sessions, toll-free help desk assistance and user support, and free access by phone to a team of financial consultants specializing in accounting for nonprofits. The help desk and user support staff are members of the cultural community—highly trained in the functionality of the CDP—and are available to answer questions by phone or email during business hours, Monday through Friday.

What is the next step?

Please review the enclosed orientation session schedule and register for one of the upcoming sessions. The Vermont CDP website (www.vtculturaldata.org) will provide answers to many of your questions about the project; meanwhile, please feel free to contact the Vermont CDP Help Desk at 855-708-8237 (855-70-VTCDP) or help@vtculturaldata.org with any other questions.

We hope you will join us at a session and learn more about how the CDP can provide valuable tools for your organization.

Sincerely,

Members of the Vermont CDP Task Force

Vermont Arts Council
The Vermont Community Foundation

> *"The CDP Help Desk Staff member was so helpful that I may call every year just for the pleasure of working with him. He was informed, patient, and very good at explaining where I had gone astray in my process.*
> *-Mary Gail Bieber, Treasurer, The Chatham Film Club, New York*

VERMONT CULTURAL DATA PROJECT

Get the most from the Vermont CDP. Attend a free orientation session.

Please register for one of the upcoming workshops. These important orientation sessions will show you and your staff how to enter data into the Vermont CDP and use its powerful reporting features.

September 12-16, 2011

St. Johnsbury
September 12, 10:00 am
Catamount Arts
REGISTER AT: vtcdp1.eventbrite.com

Montpelier
September 12, 3:30 pm
Vermont Arts Council
REGISTER AT: vtcdp2.eventbrite.com

Burlington
September 13, 10:00 am
Flynn Center for the Performing Arts
REGISTER AT: vtcdp3.eventbrite.com

Middlebury
September 14, 10:00 am
Town Hall Theatre
REGISTER AT: vtcdp4.eventbrite.com

Bennington
September 15, 3:00 pm
Vermont Arts Exchange
REGISTER AT: vtcdp5.eventbrite.com

Brattleboro
September 16, 10:00 am
New England Youth Theatre
REGISTER AT: vtcdp6.eventbrite.com

Join an orientation session online via webinar! You can participate in a web-based Vermont CDP orientation session from your office or home computer.

WEBINAR
October 19, 1:30 pm
REGISTER AT:
vtcdp-10-19-11.eventbrite.com

WEBINAR
November 16, 1:30 pm
REGISTER AT:
vtcdp-11-16-11.eventbrite.com

Please check the Vermont CDP website (www.vtculturaldata.org/news) for future orientation session dates and updates.

Questions? Visit www.vtculturaldata.org or contact the Vermont CDP Help Desk at help@vtculturaldata.org or 855-708-8237 (855-70-VTCDP).

The Vermont Cultural Data Project is made possible through the leadership of:
Vermont Arts Council
The Vermont Community Foundation

The Vermont CDP is operated by The Pew Charitable Trusts.

VERMONT CULTURAL DATA PROJECT

An Overview of the Vermont Cultural Data Project
for Arts and Cultural Organizations

The Cultural Data Project (CDP) is a powerful, online management tool designed to strengthen arts and cultural organizations. This unique system allows users to track their own financial and programmatic performance over time and to benchmark themselves against comparable organizations in specific disciplines, geographic regions and budget sizes.

Mission of the CDP

The 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 policymakers 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.

The CDP is an emerging national model for data collection for the arts and cultural sector. Organizations, funders and researchers alike will have access to the best data available, as reported by the organizations themselves.

Benefits of participating

The CDP will provide nonprofit arts and cultural organizations with the best tools to easily track trends in performance and benchmark against others. Organizations can quickly and effortlessly produce reports that will help them make their case for support to funders, board members and policymakers. After entering historical financial and operational data into a standardized online form at the end of each fiscal year, organizations can rely on technology to reformat the data to match the needs of different funders. The data collected by the CDP can also be used by researchers and advocates to make a strong case to policymakers for supporting the arts and cultural sector, and can improve the cultural policy discourse among these groups by providing fact-based information.

User support

All participants will receive technical and user support through a toll-free help desk, free access (by phone) to a team of financial consultants, statewide on- location workshops and online training provided throughout the year. The help desk and user support staff are highly trained in the functionality of the CDP, and the financial consultants specialize in accounting for nonprofits. All CDP staff have

experience in the cultural community. The CDP help desk and financial consultants are available Monday through Friday, 9:00 a.m. to 5:00 p.m. local time.

As part of the CDP's ongoing effort to ensure the integrity of the data, the help desk and user support staff will also review the submitted data for potential anomalies or inconsistencies and contact organizations with any suggested revisions. This review process **does not** prevent organizations from running reports and applying to partnering funders in any way.

Data Profile

The Data Profile is the 11-section online form that participating arts and cultural organizations complete at the end of each fiscal year. The types of data collected include basic organizational information, revenues, expenses, marketing activities, balance sheet items, investments, loans and non-financial information (including contributor and attendance numbers, facilities, pricing, capital and endowment campaigns, program activity and staffing). Organizations of all sizes can complete the Data Profile, utilizing only the line items applicable to them. This standardized form, used by thousands of organizations in all the participating states, will allow for accurate comparisons across regions.

The information collected by the CDP is based on categorizations used by auditors in accordance with generally accepted accounting principles. In contrast, the IRS Form 990 is used by the Internal Revenue Service as an indicator that nonprofit organizations are meeting the minimum requirements for tax exempt status. As a result, the CDP captures more extensive financial and programmatic information that can better tell the story of each organization as part of a grant application, report to a board or research publication.

Access to the data

Participating organizations will have access to their own data, as well as the aggregate data of other organizations for benchmarking. The executive directors of participating arts and cultural organizations can provide additional staff members, trustees, consultants and even potential donors with access to the reporting tools available through the CDP. The participating funders will have access to the data through customized reports that organizations provide with their other application materials.

Qualified researchers and advocates may submit requests to access the data for specific research projects and reports. If approved by the funders and advocacy agencies providing the leadership in Vermont, the researcher or advocate will have access to the data. In accordance with the CDP's privacy policy, however, *no individual organization's data will be disclosed in any report.*

Research

Data from the CDP has been used in several major reports, including *Arts and Economic Prosperity III*, a report by Americans for the Arts, and *Portfolio*, a report by the Greater Philadelphia Cultural Alliance using analysis by the Economy League of Greater Philadelphia. In Philadelphia, *Portfolio's* findings were cited by city council members and used to support the passage of a city bond that provided $72 million for capital projects undertaken by the city's arts and cultural organizations. By clearly demonstrating the impact of the arts on the region, the report's findings led to increased funding for the city's grant program and the reopening of the shuttered Office of Arts, Culture and Creative Economy. In Maryland, data from the Maryland State Arts Council's applicants was used by Americans for the Arts to produce an annual report designed to enhance statewide advocacy for the arts.

Cost of participation

There is no cost for arts and cultural organizations to participate in the CDP. A coalition of funders has provided the leadership support for the Vermont CDP as a service to the field and to advance the arts in Vermont and nationally.

Completing the Data Profile, however, will take some time each year. During the first year of participation, each organization will enter information for each of the two most recently completed fiscal years for which the audit/review or year-end financial statements has been board-approved; this will allow groups to see trends in their organizational performance immediately. Depending on the size and complexity of the organization, it can take time to discuss the project with staff, collect the information needed to fill out the Data Profile and enter it online. Generally, organizations should allow themselves *two weeks* to read the definitions, gather the data and complete the first Data Profile. As completing a Data Profile becomes part of the organization's annual routine, the time required will decrease.

System requirements

Organizations will need to have Internet access to participate in the CDP. The system can be used by those with a Mac or PC. Internet Explorer or Firefox are the recommended web browsers. To access the reports, organizations will need to have Adobe Reader, which can be downloaded for free. See http://www.vtculturaldata.org/systemrequirements.aspx for more information.

History

In 2004, the CDP was launched in Pennsylvania as a statewide, web-based data collection system for nonprofit arts and cultural organizations. The Pew Charitable Trusts operates the CDP on behalf of the CDP's Governing Group, which has provided oversight for the CDP since its inception. The CDP's Governing Group consists of the Greater Pittsburgh Arts Council, Greater Philadelphia Cultural Alliance, The Heinz Endowments, Pennsylvania Council on the Arts, The Pew Charitable Trusts and William Penn Foundation.

Based on the success in Pennsylvania, Maryland was the first additional state to adopt the project in 2007, followed by California in 2008. Additionally the CDP has now been implemented in Arizona, Illinois, Massachusetts, Michigan, New York, Ohio and Rhode Island. In fall 2011 the project will launch in Washington DC. Conversations about bringing the CDP to additional states are also taking place in Alaska, Colorado, Connecticut, Delaware, Florida, Georgia, Indiana, Louisiana, Maine, Minnesota, Missouri, Nevada, New Hampshire, New Jersey, New Mexico, Oregon, Texas, Virginia, Washington, Wisconsin and Wyoming.

Growth

The CDP plans to be in operation in as many as 22 states by the end of 2014, engaging up to 70 percent of the arts and cultural organizations throughout the country that apply for public and/or private funding. Through this expansion plan all geographic regions and organizations of varying disciplines and sizes will be represented.

More information

Visit the Vermont CDP Web site at www.vtculturaldata.org