



NATIONAL FORUM

BUILDING COMMUNITY THROUGH DATA • OCT 13, 2012 • MIAMI BEACH, FL

Executive Summary

The Cultural Data Project'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 grantmakers more effectively plan for and evaluate their individual and collective grantmaking activities.

The breadth and scope of the CDP has grown tremendously since its launch in 2004. Originally a project conceived to collect data on the Pennsylvania arts and cultural sector, its success has led to its expansion to 12 states and the District of Columbia, and as of fall 2012 it reaches more than 14,000 arts and cultural organizations and 250 grantmakers. To better accommodate its national expansion, the CDP is transitioning away from operation by The Pew Charitable Trusts to become an independent nonprofit on April 1, 2013.

This period of growth and change presented an ideal opportunity for the CDP to convene a National Forum as a platform for the CDP's grantmakers and stakeholders to begin building a national community through data. The Forum's 48 participants – from private foundations, community foundations, government entities, and a variety of service organizations – represented all current CDP states plus Texas.

During his opening remarks at the Forum, Glen Howard, Chair of the Board of Directors, spoke of the CDP beginning a new era and he encouraged participants to take conversations about the CDP to the next level – to “think big and creatively” about what the CDP can do for their organizations and how it can continue to serve the national community.

Plenary Presentations

CDP Implementation: Using the CDP in Your Grant Program

Presented by Laura Zucker, Executive Director of the Los Angeles County Arts Commission

Ms. Zucker urged grantmakers in a state to come together and sync up their language, to make it less burdensome for arts and cultural organizations to fill out applications to multiple grantmakers. She also discussed how the Arts Commission has spurred organizations' use of the CDP's reporting features by requiring that, when they apply for funding, they submit one additional report of their choosing along with the Funder Report. She spoke too about how arts administration groups can mobilize teams of students as their research partners and, lastly, discussed methods to encourage other funders to participate in the CDP.

CDP Technology: Using the CDP's Application Programming Interface (API)

Presented by Deborah Abramson, Managing Consultant for Technology, August Development

Ms. Abramson reviewed the most recent advancements in the CDP's technology. She discussed the CDP API and shared why it was developed, how it can be implemented for use with grant management systems, and potential future innovations. She also shared Grantmaker CDP improvements being developed in response to partners' requests. Those improvements, she said, are likely to include more flexible ways to categorize, track, and group organizations, and the ability to run exports and generate analytics on all applicants, across all applicant pools, or in new criteria-based groups.

CDP and Humanities Councils

Presented by Lauren Kushnik, Manager of Grants and Technology, New York Humanities Council

Ms. Kushnik shared the Council's experience implementing the CDP with humanities organizations. The Council conducted a survey of their applicants about CDP use and found that most face significant challenges when filling out the CDP Data Profile. To address this, the Council recommends that applicants take advantage of the CDP's online tutorials and materials, as well as the CDP's Help Desk. She encouraged others to do what her Council does: use CDP data for case-making and continue to ask themselves such questions as, what about the data is most useful? Should it be required for all organizations? Is the CDP a barrier to participation in its grant program?

CDP Research and Advocacy

Presented by Mike Latvis, Director of Public Policy, ArtServe Michigan

Mr. Latvis spoke about his organization's experience using CDP research for advocacy. Previously, arts advocates lacked current and accurate quantitative data to support the qualitative stories of their sector. ArtServe Michigan worked with a PR firm to promote its report and created a website and social media strategy that was instrumental to the report's success. Having direct access to the data used for the report allowed ArtServe to better "control the message." Its report helped not only to triple funding for the state arts council but also to change the overall tone of the conversation about arts funding in Michigan. For the first time, he said, the cultural sector is now "getting seats at tables" where key decisions are being made.

Breakout Sessions

CDP Implementation: Using CDP in Your Grant Program

Facilitated by Laura Zucker, Executive Director of the Los Angeles County Arts Commission

Participants began by discussing ways to increase the use of CDP reports by arts organizations. They stressed the value of educating staff and board members about the importance and power of CDP data, as well as requiring organizations to submit an additional report of their choosing with grant applications. Other discussion topics included the importance of cultural organizations having (i) the

right people use the CDP, thereby enabling the most valuable use of the tool, (ii) comparison reports to make their case, and (iii) multiple people be aware of and involved in their organization's use of CDP. Participants also suggested ways to increase funders' capacity to analyze and use data, especially the variety of recent technological enhancements that make it easier for funders to examine their pool of data.

CDP Technology: Using CDP's Application Programming Interface (API)

Facilitated by Deborah Abramson, Managing Consultant for Technology, August Development

This group reviewed issues surrounding the new API and reviewed what technology and organizational needs grantmakers should address before pursuing the API. One key conclusion was that, once an API is created for a grantmaker's grant management system, it can be used by other grantmakers using that same system. Participants also agreed that the most prominent challenge for grantmakers is having a staff member who understands the complexities of the CDP well enough to work productively with an outside developer. Finally, the group was enthusiastic about the CDP integrating the Financial Health Analysis and other analytic tools with the API.

CDP and Humanities Councils

Facilitated by Lauren Kushnik, Manager of Grants and Technology, New York Humanities Council

Participants discussed the opportunities and challenges around the inclusion of ethnic and faith-based organizations, as well as non-501(c)(3) entities such as fiscally-sponsored groups and cooperatives. In particular, they asked about how under-represented groups can become motivated to use the CDP. A number of ideas regarding communications and outreach were discussed, including ways to help organizations with data entry. The group agreed that the demand for the CDP should be driven by arts and culture organizations rather than by the grantmakers who require it.

CDP Research and Advocacy

Facilitated by Mike Latvis, Director of Public Policy, ArtServe Michigan

This group discussed various challenges ArtServe Michigan faced in connection with their report, *Creative State Michigan*. Key challenges included the need to explain the report to numerous parties and to defend the validity of its calculations, especially the stated return on investment (ROI). Some suggested that the sector needs to use its own compelling terminology and not let concepts such as ROI lead the conversation. When releasing an advocacy report, it is vital to meet in-person with external entities (e.g., government officials, legislators, other advocates, the media) to talk about the report, as well as to identify and emphasize what is important to that specific audience (e.g., economic impact, etc.). Other reports that use CDP data were also discussed, as was the importance of meeting with researchers to determine key messages and talking points.

CDP Horizons

CDP National Expansion

Facilitated by Glen Howard, Managing Director, Legal Affairs & General Counsel, The Pew Charitable Trusts, and Chair of the Board of Directors, Cultural Data Project

In this session, participants explored the multi-faceted nature of the CDP's national expansion and considered how best to guide it. The group contemplated what "national expansion" means for the CDP. To that end, the group discussed potential relationships between the CDP and national organizations, including the National Endowment for the Arts. They next discussed the effectiveness

of the CDP's current business model and considered potential alternatives that might further national expansion. Participants agreed that for successful national expansion, the CDP must adjust its strategies and offerings to create more demand from arts and cultural organizations themselves. Ultimately, the group concluded that the CDP's national expansion will require a new broad and strategic communications plan that moves away from branding the CDP as a state-by-state system and instead forges a unified national identity.

CDP Product Enhancements

Facilitated by Brian Rogers, Deputy Executive Director, Pennsylvania Council on the Arts, and Secretary of the Board of Directors, Cultural Data Project

This conversation explored several potential technological enhancements to the CDP and their implications for its sustainability. Participants discussed the importance of data mapping and the opportunities and challenges that mapping tools present. They also considered how to better educate arts and cultural organizations and funders about the CDP and its benefits. The group discussed product enhancement-related ways to bolster the CDP's financial sustainability, including: creating a CDP "plus" version for which organizations could pay to access added features, creating a CDP curriculum for teachers that colleges and universities could purchase, and charging researchers for CDP data use.

CDP for Grantmakers

Facilitated by Suzan Jenkins, Chief Executive Officer, Arts and Humanities Council of Montgomery County

This session examined the CDP's current and potential usefulness to participating funders. Participants expressed a desire for more education and training geared toward their needs, including via a special platform that would facilitate peer-to-peer learning among funders. Others suggested the need to reframe the CDP's communications efforts to keep funders better informed about research and advocacy based on CDP data. Participants agreed that, while it is up to grantmakers to see the CDP's benefits, the CDP should implement new measures to better educate grantmakers and inspire them to fully utilize and share the value of the CDP.

CDP for Advocacy and Research

Facilitated by Tom Kaiden, President, Greater Philadelphia Cultural Alliance, and Cultural Data Project Board member

In this session, participants focused on the current uses of CDP data for research and advocacy, and they brainstormed ways to improve this aspect of the project. The group explored several opportunities and challenges and considered the CDP's ideal role in research and advocacy efforts. Discussion topics included whether the CDP should analyze the data it collects; strengthening the identity and branding of CDP data; reforming the approval process for research requests; and inclusion of individual artists in the CDP. Participants also suggested that the CDP investigate certain new research and advocacy products and services, such as template advocacy reports for arts and cultural organizations; a "top 10" list of advocacy talking points; an economic impact calculator; a list of vetted researchers and/or pre-negotiated rates for certain studies; and a menu of both standardized and customized research offerings.

CDP Open Roundtable

Facilitated by John McGuirk, Program Director, Performing Arts Program, The William and Flora Hewlett Foundation, and Cultural Data Project Board member

This session addressed a variety of opportunities and challenges for the CDP. The conversation began with exploring current practices regarding financial indicators and potential opportunities for the CDP around the development of standards. The group then discussed the CDP's financial sustainability, including the value of the CDP for funders and justifications for their continued investment in it; project costs generally; and ways in which the CDP can cut expenses while improving its services to the sector.

Closing Remarks

Glen Howard, CDP Board Chair

Mr. Howard expressed his opinion that the high expectations for this Forum had been met, and he promised that the day's discussions would be reported to the Board of Directors and help to inform the upcoming strategic planning process. He noted that the most noteworthy themes included the need for greater transparency, communicating the CDP's value to each of our stakeholder groups (including through strengthened CDP communications capacity), and actively listening to our constituents. Mr. Howard identified several key questions that CDP management and the new Board of Directors must consider: How do we rationalize costs? Are we being as efficient as we can be? How should CDP products and services be priced? What are our ideal sources (and mix) of revenues? How might advisory councils be effectively used? He encouraged Forum participants to be open to new business models and approaches that may emerge from the CDP's strategic planning.

Mr. Howard added that, especially in an uncertain economy, it's critical for the arts and cultural sector to continuously prove its worth. Although storytelling and illustrative anecdotes will remain important, he said, powerful data must be collected and effectively utilized if the arts are to be taken seriously outside the sector itself. And, he reminded Forum participants, gathering the necessary scope of reliable data requires a concerted effort. On behalf of the CDP's Board and Staff, Mr. Howard thanked the attendees for their own work toward building the national community needed for that effort to be successful.

Themes and Conclusions

- *The CDP needs to better communicate its value beyond grantmaking.* While grantmakers should continue to be its strong advocates, arts and cultural organizations themselves should become the CDP's biggest proponents.
- *A comprehensive communications plan is necessary to address the needs of all three of the CDP's constituents.* The CDP is a complex and geographically wide-reaching system, and it can be a vehicle for building a national community around data and shared best practices.
- *As the CDP considers what it means to be a national organization, new business and revenue models must be explored.* Although the state-by-state model has served the organization well in the past, that model faces challenges as the CDP becomes a national organization.
- *Research and data can be more efficiently used.* As a technology-based organization, the CDP must embrace technological advancements in order to become more useful and relevant to its constituents.