Instructions for Editing Migrated Profiles

Below is a list of things to look out for when re-running the wizard on their data profiles (including migrated profiles).

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# Short form

Users re-running the wizard on a migrated profile (or a long-form profile with data entered) should choose NOT to complete the Short Form. If they have expenses under $50,000: Say yes to “Are your total expenses less than $50,000?” then say YES to “I want to complete the full Cultural Data Profile”

# Earned Revenue

**Restricted Earned Revenue:** If an organization has Temporarily Restricted Earned Revenue in their 2.0 profile (or Permanently Restricted Earned Revenue in their 1.0 profile) they should Answer Yes to the question “Did you have temporarily or permanently restricted earned revenue (this is rare)?”

**Earned Revenue and Activities:** Many of the lines in this section are controlled by tags. Make to select the correct activity tags if you would like to display your revenue data in a particular line. You can use the list below.

|  |  |  |  |
| --- | --- | --- | --- |
| **2.0 Question**  | **Migrated 1.0 Lines**  | **Select these Activities (or other wizard settings)** | **Error check notes**  |
| Membership Revenue  | Membership Dues (3:09) | *Answer Yes to “Does your organization have a membership program?”*  |  |
| Revenue from Full Subscriptions | Subscriptions – Performance (3:10) | Performances, then answer yes to “Do you have a subscription program?”  | Required to enter in person attendance somewhere in the Program Activity Section.  |
| Revenue from Partial Subscriptions |  | Performances, then answer yes to “Do you have a subscription program?” | Required to enter in person attendance somewhere in the Program Activity Section. |
| Single Ticket Sales  | Ticket Sales (3:02) | “Festivals, fairs, parades or community events” OR Performances OR Open Rehearsals OR Screenings  | Required to enter in person attendance somewhere in the Program Activity Section. |
| Group Ticket Sales  |  | “Festivals, fairs, parades or community events” OR Performances OR Open Rehearsals OR Screenings  | Required to enter in person attendance somewhere in the Program Activity Section. |
| Touring Fees  |  | Performances OR Open Rehearsals OR Screenings  | Required to enter in person attendance somewhere in the Program Activity Section. |
| Media Subscription Revenue  | Subscriptions – Media (3:10a) | Broadcasting OR Publishing Books OR Periodicals  | Required to enter listeners or viewers (if Broadcasting is selected); Required to enter Books OR Periodicals distributed (if Publishing is selected) |
| Broadcast Subscription Revenue |  | Broadcasting | Required to enter listeners or viewers |
| Publication Sales |  | “Publishing Books or Periodicals” | Required to enter Books OR Periodicals distributed |
| Royalties, Rights, and Reproductions | Royalties/Rights & Reproductions (03:01) | “Publishing Books or Periodicals” OR Broadcasting OR Performances OR Open Rehearsals OR Screenings  | Required to enter in person attendance somewhere in the Program Activity Section (if Performances, Open Rehearsals, or Screenings entered); Required to enter listeners or viewers (if Broadcasting is selected); Required to enter Books OR Periodicals distributed (if Publishing is selected) |
| Admissions | Admissions (03:01) | Exhibits  | Required to enter in person attendance somewhere in the Program Activity Section; required to enter a number of exhibits (or another type of programming)  |
| Guided or Group Tour Revenue |  | Exhibits OR Guided tours | Required to enter in person attendance somewhere in the Program Activity Section; required to enter a number of exhibits (or another type of programming) |
| Gallery Sales |  | Exhibits OR Circulates Works  | Required to enter in person attendance somewhere in the Program Activity Section; required to enter a number of exhibits (or another type of programming) |
| Space Rentals  | Rental Income (03:12) | “Providing rehearsal, meeting, office, or other space” | NA |
| Other Rentals |  | “Providing equipment, sets, costumes, or other materials” OR Circulating works | NA |
| Contracted Services | Contracted Services/Performance Fees (03:11) | Advocacy OR Conducting research OR “Historic preservation or restoration” OR Arts Education OR “Classes, lectures, or professional development” OR “Consulting or fee-for-service work” | Required to enter in person attendance somewhere in the Program Activity Section and at least one type of programming (if Arts Ed or Classes is selected)   |
| Loan Interest |  | Financing  | NA |
| Application Fees |  | Grant making OR Fiscal Sponsorship OR Financing OR Providing Residencies OR Competitions OR Commissioning Works OR Developing works  | NA |
| Fiscal Sponsorship Administration Fees |  | Fiscal Sponsorship | NA |
| Tuition and Registration Fees  | Tuitions (3:03) ; Workshop & Lecture Fees (3:04) | Arts Education OR “Classes, lectures, or professional development” OR Field Trips OR Conferences OR Other Events | Required to enter in person attendance somewhere in the Program Activity Section and at least one type of programming (if Arts Ed or Classes is selected)  |

# Contributed and Other Revenue

**Restricted Revenue:** If the organization has *Temporarily or Permanently Restricted Contributed or Investment Revenue* in their 2.0 or 1.0 profile, they should Answer Yes to the question “Did you have temporarily or permanently restricted earned revenue (this is rare)?”

**Non-Operating Revenue**: If your 2.0 profile has non-operating revenue then Answer Yes to the question “Did your organization have non-operating revenues in FY 2010?”

If 1.0 profile has Transfers and Reclassifications – choose non-operating revenue.

**Membership**: If your organization has members entered in your migrated profile **(Paying Members, 11:E2**) or the membership section completed in your 2.0 profile, say yes to the question “Did your organization offer individual or group membership programs in 2012?”

**Subscriptions**: If your organization has members entered in your migrated profile **(Paying Subscribers - Performance, 11:E1)** or the Subscriptions section completed in your 2.0 profile, Select Performances as an activity, then answer yes to “Do you have a subscription program?”

# Non-Personnel Expenses

**Non-Personnel Expenses and Activities:** Many of the lines in this section are controlled by tags. Make sure to select the correct activity tags if you would like to display your revenue data in a particular line. You can use the list below. (Any line item not on the list below will always show up in your long form survey).

|  |  |  |  |
| --- | --- | --- | --- |
| **2.0 Question**  | **Migrated 1.0 Lines**  | **Select these Activities (or other wizard settings)** | **Error check notes**  |
| Grant Awards | Grantmaking Expense (06:20) | Grantmaking  | If data is entered in Grant Awards, an additional question will appear at the bottom of this section, where users will have to enter the amount awarded to individuals and organizations. The total of those two fields must equal Grant Awards.  |
| Recording and Broadcasting Expenses | Recording & Broadcast Costs (6:38a) | Broadcasting | Required to enter listeners or viewers in program activity  |
| Royalties, Rights, and Reproductions | Royalties/Rights & Reproductions (6:38b) | Broadcasting OR Commissioning works OR Developing works OR Open Rehearsals OR Performances OR “Publishing books or periodicals” OR Screenings | *Broadcasting* = Required to enter listeners or viewers in program activity*; Open Rehearsals or Performances* = Required to enter in person attendance somewhere in the Program Activity Section; required to enter a number of some type of program; *Publishing* = required to enter Books OR Periodicals distributed |
| Exhibition Costs |  | Exhibits  | Required to enter in person attendance somewhere in the Program Activity Section; required to enter a number of exhibits (or another type of programming)  |
| Collections Management | Collections Conservation (6:10) AND Collections Management (6:11) | Exhibits OR Circulating Works, OR Historic preservation or restoration | *Exhibits* = Required to enter in person attendance somewhere in the Program Activity Section; required to enter a number of exhibits (or another type of programming)  |
| Production and Event Costs | Production & Exhibition Costs (6:34), Touring (6:42) | Competitions OR Conferences, OR Field trips OR Open Rehearsals, OR Performances OR Other types of programs  | Field Trips, Open Rehearsals, Performances, or Other = Required to enter in person attendance somewhere in the Program Activity Section; required to enter a number of at least one type of program |

# Non-Operating Expenses

**Non-Operating Expenses**: If your 2.0 profile has non-operating revenue then Answer Yes to the question “Did your organization have non-operating expenses in FY XXXX”

NO 1.0 data was migrated to Non-Operating Expenses

# Balance Sheet

Migrated profiles: If the organization has any balance sheet data entered in their 1.0 profile they should either:

1. Answer Yes to the question: Do you have a completed audit or review for 2009?
2. Screenshot or otherwise save their balance sheet data in the disaggregated balance sheet, then answer No to the audited question, and then re-enter their totals into the Aggregated balance sheet. NOTE: this might be preferable for very small orgs who only have 1 or 2 lines in the balance sheet filled out).

2.0 Profiles with Balance Sheet Data

Changing the answer to the question Do you have a completed audit or review for 2009?, will cause data already entered in the balance sheet to be hidden.

# Endowment and Reserves (Investments)

Migrated Profiles: If the organization has data entered about Investments (Section 9) in their 1.0 profile, they will need to say yes to the question, Did your organization have a donor-restricted endowment, a board designated endowment, or reserve funds in FY 2009?, to see that information in their 2.0 survey. They will also need to answer the first question in that section (Fund Type) to see the migrated data for each type of endowment.

# Program Activity: Attendance

**Attendance in Migrated Profiles**: For any migrated profile that is editing in 2.0, users will have to re-enter their attendance information for each type of program activity.

**Editing profiles in 2.0:** If users re-run the profile wizard, and uncheck any program activities, data they have already entered in the corresponding sections will be lost

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# Program Activity: Programs

Program Activity in Migrated profiles: Most program activity information was migrated to 2.0, below is a list of 2.0 line items that were migrated, and which program activity selections users will have to make to see these lines in their 2.0 profile

|  |  |  |  |
| --- | --- | --- | --- |
| **Migrated 1.0 Lines** | **2.0 Question** | **Select these Activities (or other wizard settings)** | **Error check notes**  |
| Classes/Workshops - for the public/constituents (11:G6), Classes/Workshops - for professional artists | One-time Classes/Workshops | “Classes, Lectures, or Professional Development” | Must enter in person attendance somewhere in the profile |
| Works Commissioned (11:G15) | Works Commissioned | Commissioning Works |  |
| Workshops or readings of new works (11:G16) | Workshops or readings of new works | Developing Works |  |
| Ticket Prices: Highest Single Price (11:F5), Lowest Single Price (11:F6) | Standard Admission Price Range AND Single Adult Ticket Price Range*(this is migrated to both, the user should select whichever activity makes sense for them)*  | Exhibits OR Performances  | Required to enter in person attendance somewhere in the Program Activity Section; required to enter some kind of program |
| Permanent Exhibitions (11:G4) | Permanent Exhibits | Exhibits  | Required to enter in person attendance somewhere in the Program Activity Section; required to enter a number of exhibits (or another type of programming)  |
| Temporary Exhibitions (11:G5) | Temporary Exhibits | Exhibits | Required to enter in person attendance somewhere in the Program Activity Section; required to enter a number of exhibits (or another type of programming)  |
| Lectures (11:G10) | Lectures | Classes, lectures, or professional development OR Arts education  | Required to enter in person attendance somewhere in the Program Activity Section and at least one type of programming  |
| Live Productions - Self-Produced (11:G1), Live Productions - Presented Only (11:G1a) | Performances | Performances | Required to enter in person attendance somewhere in the Program Activity Section and at least one type of programming  |
| Off-site School Programs (11:G18) | Programs in Schools | Arts Education  | Required to enter in person attendance somewhere in the Program Activity Section and at least one type of programming  |
| Average Publication Price (11:F10) | Issue Price | “Publishing Books or Periodicals”  | Required to enter Books OR Periodicals distributed |
| Films (11:G9) | Screenings | Film Screenings | Required to enter in person attendance somewhere in the Program Activity Section and at least one type of programming  |
| Programs – Other (11:G17) | Other Programs | “Other types of programs” | Required to enter in person attendance somewhere in the Program Activity Section and at least one type of programming  |
| Average Non-fundraising Special Event Price (11:F12) | Price Range (Other Programs)  | “Other types of programs” | Required to enter in person attendance somewhere in the Program Activity Section and at least one type of programming  |