CADAC REPLACEMENT INITIATIVE
FREQUENTLY ASKED QUESTIONS

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Last update: November 2022

Frequently Asked Questions

This Frequently Asked Questions (FAQ) document is called to evolve regularly as questions and answers are added and as the initiative progresses. We invite you to consult the document regularly.

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CADAC Replacement Initiative - Frequently Asked Questions (FAQ)

Main Changes brought to CADAC

Will changes be made to the CADAC financial line codes and the chart of accounts?

There will be minor improvements and better clarifications to the financial form based on the analysis on the feedback from CADAC users. More information can be found on the cadac.ca website under the Training for Organizations section. Two documents have been built which provides more details:

- CADAC Financial Form - Summary of changes
- CADAC Financial Form - Detailed view of changes

Are any of the categories in the Statistical form changing?

No changes have been made to the statistical form at this time. A working group will be put together with funding agencies in 2023 to discuss redesigning the statistical form to improve user experience.

More information will be communicated in 2023 once the working group will remit their recommendations.

I heard that it is possible to use an accounting software to import my financial statement data in CADAC. Can you recommend one?

At this time, we cannot make any recommendation for any accounting software. The CADAC Support team is exploring technology improvements that will facilitate importing the external data to CADAC from an accounting software to the financial form.

We will seek to involve volunteer organizations in 2023 to participate in an advisory group to engage them in an open discussion around the struggles and potential solutions of using a commercial accounting software to extract data to CADAC.

What are the changes made to the CADAC system?

To get more information on the changes that are relevant to the new system, we invite you to listen to the November 9 CADAC information session where we provide the details.

The link to the presentation can be found on www.cadac.ca under the section *Need Help / CADAC Replacement Initiative Updates*.

CADAC Replacement Initiative - Frequently Asked Questions (FAQ)

Activities Around the Development of the new CADAC

What are some of the activities planned during the initiative to replace the CADAC system?

The initiative is separated in 5 phases: Development, Testing, Pilot, Deployment and Support.

Phase 1 – Development: During this phase, the initiative team is working in collaboration with key stakeholders to document the requirements, review the legacy system and identify what needs to be improved. From this, the new interface and system will be developed.

Phase 2 – Testing: During this phase, a team is put together to evaluate whether the new CADAC and its components satisfy the specified requirements and will confirm if it is ready for implementation. A small group of users will be put together to sample the system and review all the functionalities of the new CADAC system. The feedback of the pilot participants will help us identify what needs to be improved before the pilot.

Phase 3 – Pilot: A pilot will happen before the deployment. The pilot is a way to help us reveal unforeseen challenges that need to be addressed, giving the team an opportunity to fine-tune and make any necessary adjustments in a way that minimizes the impact on users. The pilot will help us test in real-time the new CADAC system and confirm if we are ready to deploy new CADAC system to all users. The initiative team have collaborated with arts funding agencies and a number of arts organizations to essentially simulate a small-scale implementation.

Phase 4 – Launch: During this phase, there are 3 activities that will take place: the freeze of the legacy CADAC system (in view mode only), the data migration from the legacy CADAC system to the new system, and the official launch of the new system.

Phase 5 – Support after the launch: During this phase, arts organizations will receive a series of communications to be kept them abreast of the latest information on new CADAC system. A team will be in place to train and support CADAC users as they need to connect to the new CADAC system.

Were arts funding agencies and arts organizations consulted to identify the changes and needs to enhance the new CADAC system?

Yes. Since the beginning of the initiative, a CADAC Working Group which represents majority of arts funding agencies in Canada has been responsible to contribute to the development of the CADAC business requirements on behalf of all CADAC members. They discuss improvements to financial and statistical forms, and more. Their participation has been a key in optimizing the new CADAC system.

We also involved arts organizations across different disciplines and geographies in Canada in the user testing activities conducted in October and November to have their perspectives and recommendations

Which arts funding agencies are members of CADAC?

To see the full list, please go to the CADAC Members section in www.cadac.ca to consult which Canadian public agencies, together with the Canada Council for the Arts, provide funds for artistic activities at the federal, provincial, territorial, municipal and regional levels.

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What have you done to ensure that the CADAC system respects the norms around accessibility and user experience?

We hired an expert who has been working with us to make sure we are WCAG compliant. This means that it follows the web content accessibility guidelines, which is set of rules followed by website creators to ensure all people with disabilities get access to websites.

To be WCAG (Web Content Accessibility Guidelines) compliant means that we ensured that:

- Images contain descriptive
- Content can be magnified for easier reading
- Form-entry tasks have no time limit
- Able to navigate without the use of a mouse using "tab" button
- Use proper heading level structure for screen readers

Actions Needed from Arts Organizations to Prepare for the launch

When is the launch of the new CADAC system planned?

The official launch is planned for December 8, 2022.

All CADAC active users will receive an email on December 8, inviting them to access the new CADAC system and update their organization and user information. Active users are all users who have logged into the CADAC system in 2022.

While you may not need to update your financial and statistical information as of December 8, you will need to accept the invitation to login to the new CADAC so that your user status will be updated in the new system.

You mentioned there would be a freeze period from December 3 to 7. When will it be happening and are we going to lose access to CADAC?

There will be a freeze period in Mid-November 2022 that will last for one week while your data is migrated from the legacy system to the new system. During that time, access to the CADAC system will be limited to view-only mode. It means that you can still log in and view your data, whereas you will not be able to make any changes to your CADAC information during that period. Until then, you can use the current CADAC system as you normally would.

After the launch, you will still be able to access the legacy CADAC system. However, we recommend that you will use new system unless unforeseen specific situations.

Is there anything that an arts organization needs to complete before the freeze period?

Two actions should be completed:

1. **Clean-up your user list prior to December 2 at midnight EST:** It is the responsibility of the arts organization to ensure that you share financial and statistical information in the current CADAC only with people who absolutely need. It is important that <u>you update your user list as soon as possible</u> and make the status of all other users who you do not wish to provide access <u>inactive</u>.

2. **Update to financial and statistical forms**: Any modification to your organization's financial and statistical forms need to be completed before December 2 at midnight EST if you need meet your funding agencies' requirements. We recommend that you reach out to your program officer or support officer responsible for your grant to get more information.

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Are the existing data in the current CADAC being automatically transferred to the new CADAC system?

Historical data that is in the current CADAC system will be automatically migrated to the new system (since 2013). This will happen during the freeze period happening between December 3 and 7. Arts organizations do not have to conduct any special action for this.

Arts organizations will also receive a communication on November 30 providing information on how to extract and save the information they have uploaded in the legacy CADAC system.

How will you keep arts organizations and arts funding agencies informed during the initiative?

The arts funding agencies and members of CADAC, have been collaborating during the initiative and providing their feedback and recommendations on improvements to the CADAC legacy system and on how to best communicate to and support arts organizations. A CADAC Working Group was struck in 2021. Since then, the working group has been meeting on a monthly to collaborate in workshops and to exchange on initiative updates.

Regular updates were provided on July 14 and on November 8 and 9, 2022 with National Arts Services Organizations, Arts Services Organizations and arts organizations using CADAC in the form of email communications and information sessions.

For organizations that could not attend or wish to listen to the recordings of the information sessions are available on the new CADAC support webpage at www.cadac.ca under the section called *Need Help / CADAC Replacement Initiative Updates*.

Training and Support Activities Offered to Arts Organizations

Have you planned training for the new CADAC system?

Yes. Live training sessions will be made available for all users. On November 30, all active CADAC users will receive a communication inviting them to register to training sessions happening between December 9 and March 31.

Will there be training videos made available for the new system?

CADAC Training videos will be shared with all CADAC users on the CADAC Support YouTube Channel. A list of the training videos is also available on the cadac.ca webpage under Training for organizations.

Will you be sharing user guides?

Supporting documentation will be provided starting December 8 on the cadac.ca webpage under Training for organizations.

How will you support CADAC users during this transition?

The CADAC support webpage has been put together to centralize all the support materials and services provided by CADAC. If you need to connect with the CADAC support team for general inquiries, technical questions, training, support or feedback, simply click on the "Contact Us" button and complete the form specifying how we can support you. Someone from the team will contact you in the next 2 to 3 business days.

We also invite you to contact your arts funding agency for support if it relates specifically to financial or statistical information you need to provide during a grant competition.

About CADAC and the 2022 Replacement Initiative

Mission and objectives of CADAC

What is the mission of CADAC?

CADAC (Canadian Arts Data / Données sur les arts au Canada) has for mission to collect and make available consistent, credible financial and statistical data on publicly funded arts organizations in Canada. CADAC is contributing to an environment in which both arts funding agencies and arts organizations are better positioned to do their work.

Why is CADAC so important to the arts community?

A joint effort of arts funders across the country, CADAC provides a simplified process and standardized forms for arts organizations applying for operating (core) grants. Arts organizations making application to multiple arts funding agencies submit their financial and statistical information in a single format, to a single platform, and they have access to their own historical data and to reports both on their own organizations and comparisons to all similar organizations in the database.

Arts funding agencies have immediate access to current and consistent data for all the arts organizations they fund. Aggregate data across CADAC is also accessible, allowing for reliable and consistent analysis of the Canadian arts sector. Individually and collectively, arts funding agencies will be able to report on the health of the field and the impact of the arts in their communities.

What are the objectives supporting CADAC?

CADAC creates efficiencies and opportunities for arts funding agencies and arts organizations by:
- Providing common financial and statistical forms.
- Improving accountability and transparency for both funders and applicants by reviewing and validating financial data.
- Providing reliable data for assessment processes, research, policy and program development, performance measurement and evaluation.
- Providing data that helps demonstrate the value and reach of public funding of the arts.

When was CADAC created and what are some of its milestones?

The CADAC journey started 14 years ago. It started small and slowly evolved to the invaluable service it is today. If we look at the timeline,
- In 2008, CADAC launched its first system.
- Since 2012, the CADAC system has been further improved to respond to its users' needs.
- 2018 was our 10-year anniversary. CADAC sought advisory support for a technical and functional review of its system, with the objective to determine the next steps in the product's lifecycle. KPMG is a globally renowned firm providing Audit, Tax and Advisory services. KPMG delivered its recommendations, and we went to work on the next generation of CADAC.
- In 2021, a Master Service Agreement between the Canada Council and CADAC members was signed and established the new basis of the CADAC.
- In 2022, we are now preparing to deploy the new CADAC system. More information will be provided in the "About the CADAC Initiative" section.

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What are some important facts around CADAC?
Did you know that:
- CADAC is the only source of detailed data about arts organizations in Canada that receive operating (core) grants
- CADAC is one of the most reliable data sources that supported the public arts funders to develop and implement funding initiative to support the arts sector during the pandemic
- CADAC has over 1800 registered and active arts organizations from across the country with over 2400 users
- In the past 14 years, the CADAC system has been used in over 60 programs and 6,000 financial forms have been reconciled
- Various important reporting and research opportunities assessing the impact and outcome of funding on the arts community have been possible thanks to more than 10,000 financial and 7,200 statistical forms, including historical and projected data, currently existing in the system.

Important information concerning the CADAC Initiative

Why has the new CADAC system initiative been put in place?
The Canada Council for the Arts recognized that there was an opportunity to invest towards the modernization of its technology portfolio, which includes the new CADAC system.

The CADAC initiative's objectives are to:
- Replace the existing legacy CADAC system with a new cloud-based solution and transform CADAC's capability with a business intelligence tool for arts funding agencies, arts organizations, and researchers.
- Decommission the current legacy system once the new system is in production and is technologically stable.

What are some of the positive changes we can expect to see in the new CADAC system?
During the past few years, technology has greatly evolved. It now offers better digital and user experience which help to continue improving the user interface and its functionalities.

With the new CADAC, the initiative expects to:
- Enhance the user experience through an easier navigation, a clearer interface and functionalities.
- Improve operational efficiencies for the CADAC team to better support arts organizations and arts funding agencies.
- Provide an improved Web based accessibility and performance.
- Improve reporting and analytics capabilities, providing better visuals and experience around the data available in the system, and enabling value-added information such as aggregation, comparison, and analysis for all stakeholders.
- Automate and optimize workflows to minimize reliance on manual effort, therefore freeing up time and reducing risks of errors.
- Offer flexibility for future development of the financial and statistical forms.

What are the CADAC champions and how will they be selected?
Funding Agencies have been asked to solicit a list of champions, ensuring that the selection process is transparent and fair. Champions have involved in creating the requirement of the new CADAC system, participated in testing activities and feedback sessions, and reviewed training material and guides.