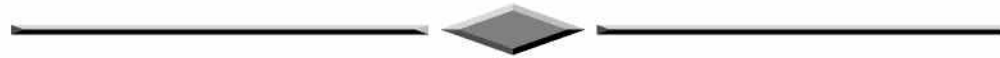


Community Partnership for Arts and Culture

Cuyahoga County Arts and Culture Organizations and Economic Recession

Survey Findings

Summary Results



October 2009

Survey Analysis Conducted by: Cypress Research Group

For

Community Partnership for Arts and Culture

1900 Superior Avenue, Suite 130

Cleveland, OH 44114



Community Partnership for Arts and Culture (CPAC)

- ❖ **Our Vision:** The powerful competitive advantage generated by our distinctive arts and culture sector is widely recognized and supported both publicly and privately.
- ❖ **Our Mission:** To strengthen and unify greater Cleveland's arts and culture sector.
- ❖ **Our Core Beliefs:** CPAC believes that:
 - ❖ Arts and culture is an essential asset in building and sustaining a vibrant, thriving community.
 - ❖ Creative and innovative ideas, the core attributes of arts and culture, are central to a community's development. In this era of knowledge-based economies, business and civic leaders should strategically position their communities to take full advantage of the benefits provided by creative individuals and organizations in the arts and culture sector.
 - ❖ Arts and culture fosters developmental, intellectual and emotional benefits unique to each individual. When arts and culture is widely available, citizens have sharper insights, greater empathy and heightened community involvement.
- ❖ **Our Guiding Principles:** In pursuing its vision and mission and acknowledging its beliefs, CPAC will:
 - ❖ **LEAD:** Set direction with the arts and culture sector based on shared interests and potential impact on arts and culture organizations and individual artists.
 - ❖ **ADVOCATE:** Position arts and culture as a driving force in building a vibrant community, particularly where community priorities and funding decisions are determined.
 - ❖ **EDUCATE:** Inform community decision-making through credible research that identifies solutions for evolving needs and demonstrates the contribution arts and culture makes to the economy, education and quality of life.
 - ❖ **CONVENE:** Provide opportunities for the community's diverse arts and culture constituencies to join together to learn about and take collective action on shared interests and objectives.

Acknowledgements

❖ CPAC's work is made possible through the generous support of:



The George Gund Foundation



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Executive Summary – Goals and Limitations of Research

- ❖ Goals of this report:
 - ❖ The research and findings in the following pages are designed to analyze Cuyahoga County's arts and culture sector in these challenging economic times and to make recommendations for sustainability and future recovery.
 - ❖ This report seeks to identify the assumptions and experiences that are driving the actions of organizations in Cuyahoga County's arts and culture sector through both a quantitative and qualitative approach.

- ❖ Limitations of the research:
 - ❖ Our findings amount to an internal examination of Cuyahoga County's arts and culture sector as perceived by the sample group of surveyed organizations.
 - ❖ Since the survey's findings are based on the opinions of organizations, they may not be reflective of economic realities.
 - ❖ Instead, the findings provide us with insights on how the sampled Cuyahoga County arts and culture organizations are viewing and reacting to the current economic situation. This can spur an internal dialogue about future courses of action for the sector as a whole.

Executive Summary – Findings

❖ Quantitative Findings:

- ❖ Based on the results of the online survey analysis, Cuyahoga County's arts and culture sector currently is:
 - ❖ Comprised of more small arts and culture organizations than medium or large organizations (Median # of Full-Time Equivalent (FTE) employees = 5; Average # of FTE employees = 30; Range of FTE employees = 305.5).
 - ❖ Anticipating a decrease in staffing levels (-3% overall).
 - ❖ Expecting to cut expenditures in a variety of areas with no one area taking a large reduction.
 - ❖ Scaling down income projections.
 - ❖ Bolstering fundraising efforts.
 - ❖ Showing growth in its educational program categories.
 - ❖ Employing a majority of people who are not artists.

❖ Qualitative Findings:

- ❖ CPAC held an Arts and Cultural Roundtable Seminar titled “Surviving the Not-So-Great Recession,” where attendees were given the opportunity to listen to a keynote presentation made by Holly Sidford of the Helicon Collaborative on the research findings her firm collected in the Puget Sound region of Washington.
- ❖ After this presentation, participants were able to reflect upon and discuss the ramifications of the presentation in facilitated focus groups for various stakeholders: small arts and culture organizations, medium and large arts and culture organizations, artists, and funders.
- ❖ In the Roundtable focus groups several common aspirations and action steps emerged. Cuyahoga County’s arts and culture sector aspires to be:
 - ❖ Collaborative
 - ❖ Engaging
 - ❖ United
 - ❖ Financially Stable
 - ❖ Innovative
 - ❖ Reflective

Overview of Research Efforts

Introduction

- ❖ Arts and culture organizations are being driven to assess their operating practices and develop strategies for organizational survival in light of today's dismal economic climate. However, organizations taking more progressive approaches in the face of economic turmoil are less common than organizations who take more reactive or dismissive approaches (see The Helicon Collaborative's 2009 study *The Economic Recession's Impact on Cultural Organizations in the Puget Sound*).

Community Partnership for Arts and Culture (CPAC) recognizes that a particular course of action is only effective if decision makers fully understand their operations and respond in the context of their unique environments. Without this knowledge, organizational leaders will have difficulty in responding to their financial challenges in a coordinated and meaningful way.

To this end, CPAC developed two parallel research efforts that yielded a variety of data snapshots of Cuyahoga County's arts and culture sector. The first approach was a quantitative online survey and the second was a qualitative series of focus groups. This document will present the datasets from both studies and offer reflections on the different stories they illustrate.

Objectives and Methods

❖ **Quantitative Research Design:** CPAC oversaw the development and administration of an online survey that was given to select Cuyahoga County arts and culture organizations. CPAC was granted permission to adapt its survey from an online protocol originally created by ArtsFund (Seattle, WA). A total of 65 organizations were contacted via email to solicit participation in the online survey. The 65 organizations were selected through identifying the recipients of Cuyahoga Arts and Culture (CAC) General Operating Support (GOS) grants over a three year period.¹ These 65 organizations serve the largest arts and culture constituent base in terms of Cuyahoga County residents and visitors. For this reason, they were viewed as being an appropriate starting point for analyzing the County's arts and culture sector, although more extensive surveying is warranted for the future. Data from these 65 organizations were collected in April, May and June of 2009 (Average number of responding organizations = 46; Median = 47).

❖ **Qualitative Research Design:** On Friday, May 1, 2009, CPAC organized an Arts and Cultural Roundtable Seminar called "Surviving the Not-So-Great Recession," which focused on the recession's impact on the arts and culture sector and examined opportunities for the sector to adapt to a rapidly changing environment. A keynote presentation was made by Holly Sidford of the Helicon Collaborative on the research findings her firm collected in the Puget Sound region of Washington. This presentation was followed by facilitated focus groups to discuss the issues and identify potential solutions for various stakeholders: artists, small arts and culture organizations, medium and large arts and culture organizations, and funders.

❖ The following report contains the aggregate results of the online survey and a summary of the Roundtable's facilitated breakout sessions. Survey results were compiled by a third-party and no organization's individual results are identified.

¹CAC organizes its GOS applicants into 4 categories delineated by budget size: 37% of its applicants are in Category 1 (Budget size: \$25,000-\$250,000); 26% are in Category 2 (\$300,000-\$875,000); 19% are in Category 3 (\$1,000,000-\$3,900,000); and 18% are in Category 4 (\$4,000,000-\$6,000,000).

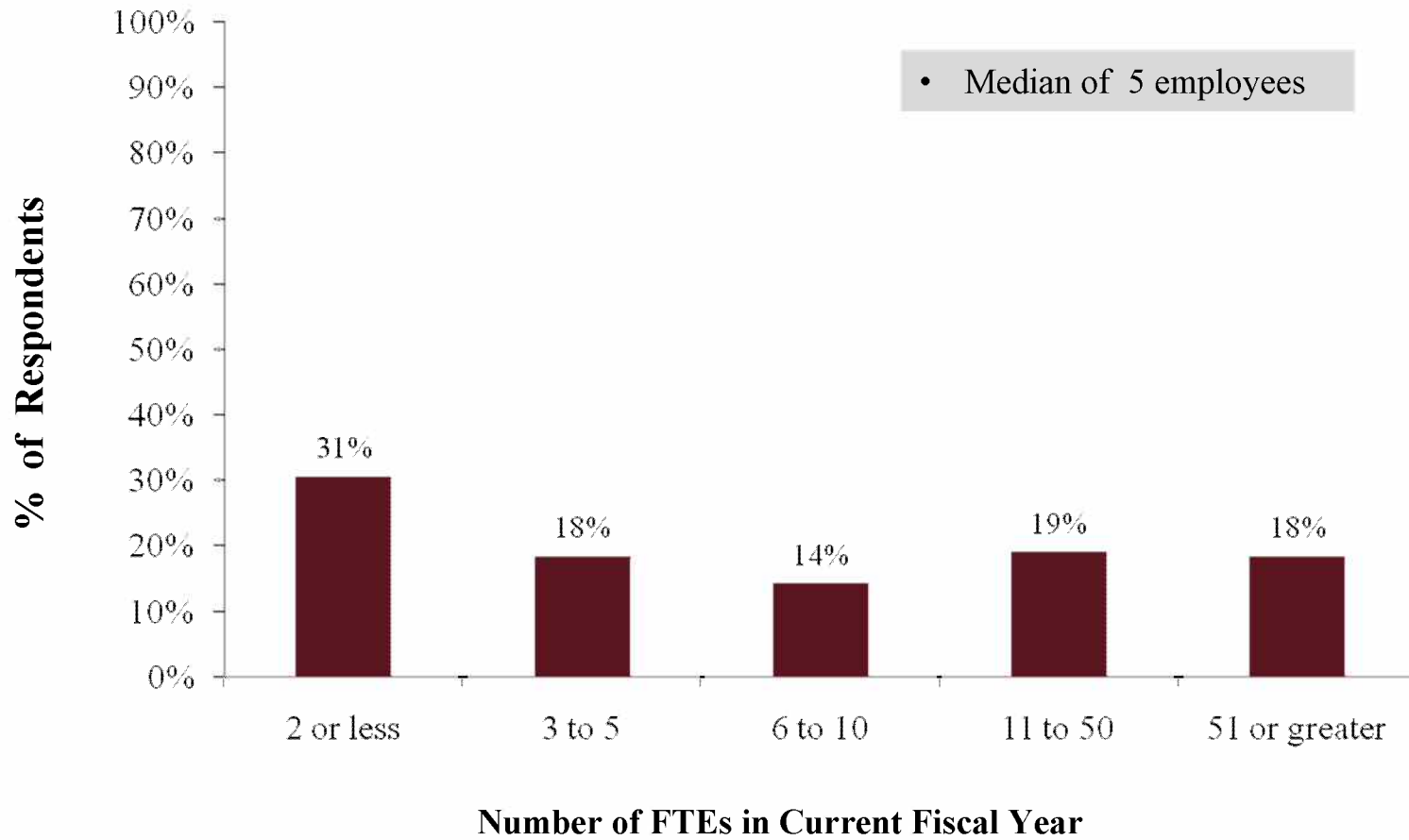
Quantitative Research Design

***Online Survey Results:
Changes in Workforce***

Changes in Workforce

Number of FTE Employees In Current Fiscal Year (n=49)

Q2: How many total full-time equivalent positions (FTEs) did your organization have at the beginning of this fiscal year?

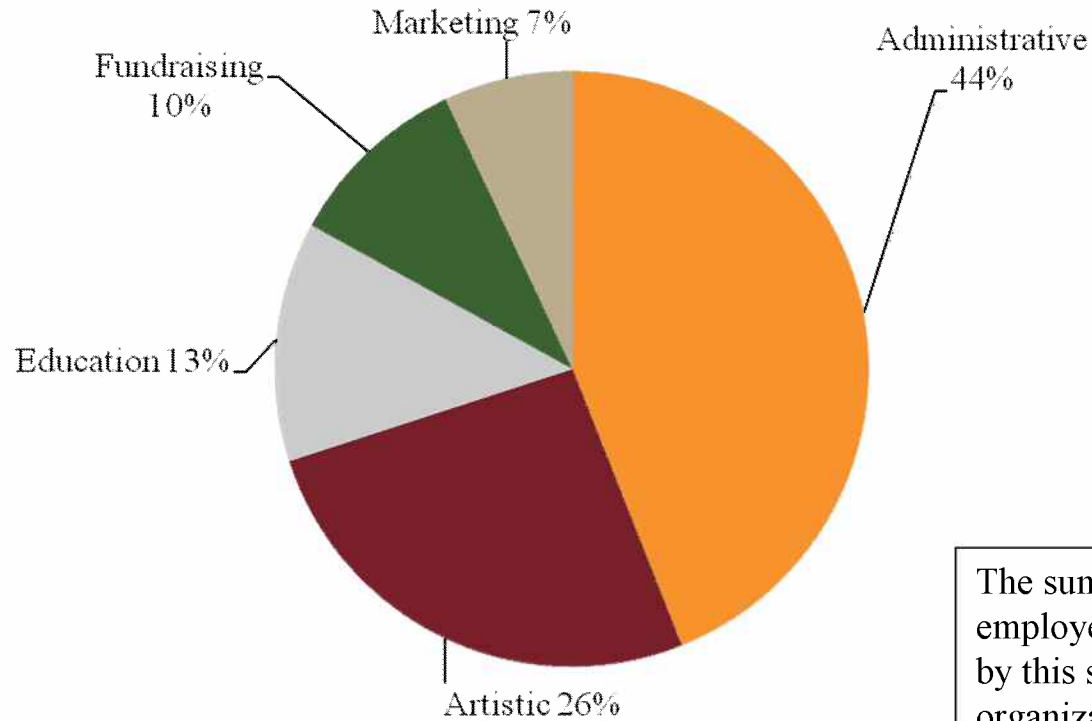


Changes in Workforce

Current Fiscal Year FTE Workforce by Category (n=50)

Q3: How many total full-time equivalent positions (FTEs) did your organization have at the beginning of this fiscal year?

Summed Employees of All Responding Organizations



The summed total of employees represented by this survey of 51 organizations is 1,476 employees.

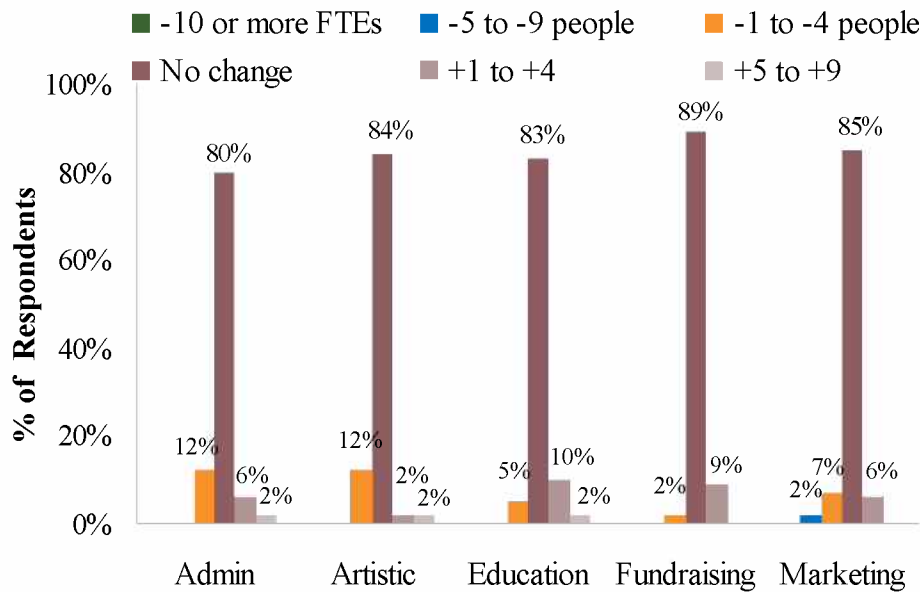
Changes in Workforce

Current/Projected Changes in Workforce by Category

(Current Fiscal Year n=46; Next Fiscal Year n=49)

Q4/Q10: What changes in your workforce do you now expect in the following categories during this/next fiscal year?

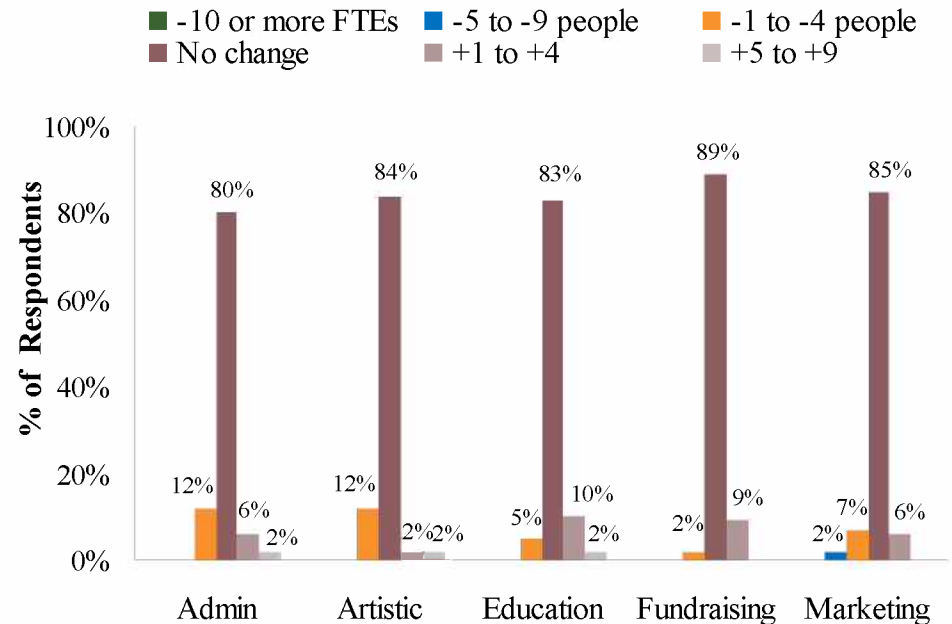
Changes in Workforce in Current Fiscal Year By Category



Net Changes:

Admin: -1.9%
 Artistic: -0.4%
 Education: -0.7%
 Fundraising: -0.6%
 Marketing: -0.9%
 Overall: -3.3%

Changes in Workforce in Next Fiscal Year By Category



Net Changes:

Admin: -.03%
 Artistic: -.2%
 Education: +1%
 Fundraising: +.6%
 Marketing: -.5%
 Overall: +.9%

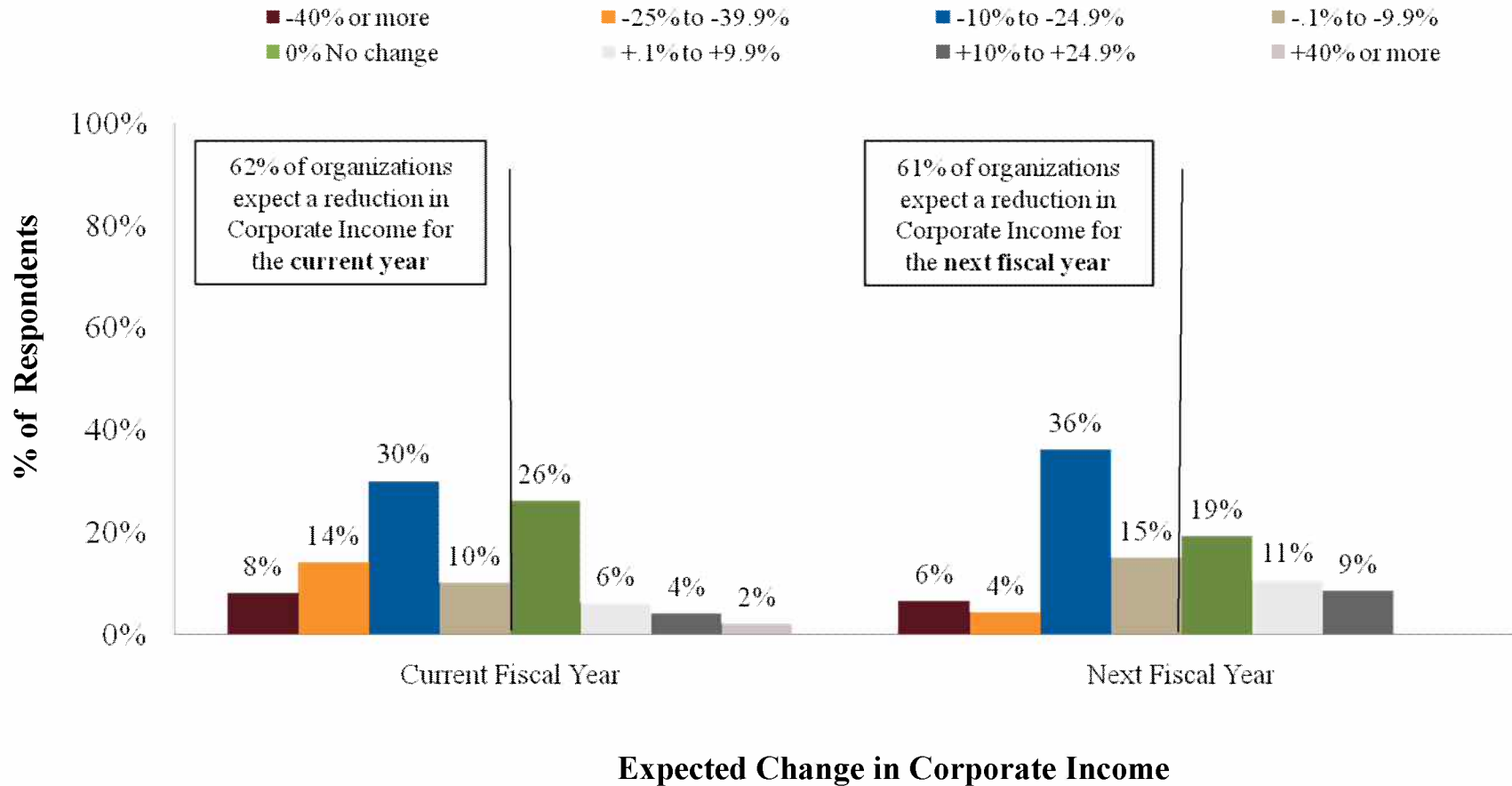
***Online Survey Results:
Changes in Income***

Changes in Income

Changes in Corporate Income Expectations

(Current Fiscal Year n=50; Next Fiscal Year n=47)

Q5/Q11: How much, if at all, are you altering your contributed income expectations for current/next fiscal year in each of the following categories?

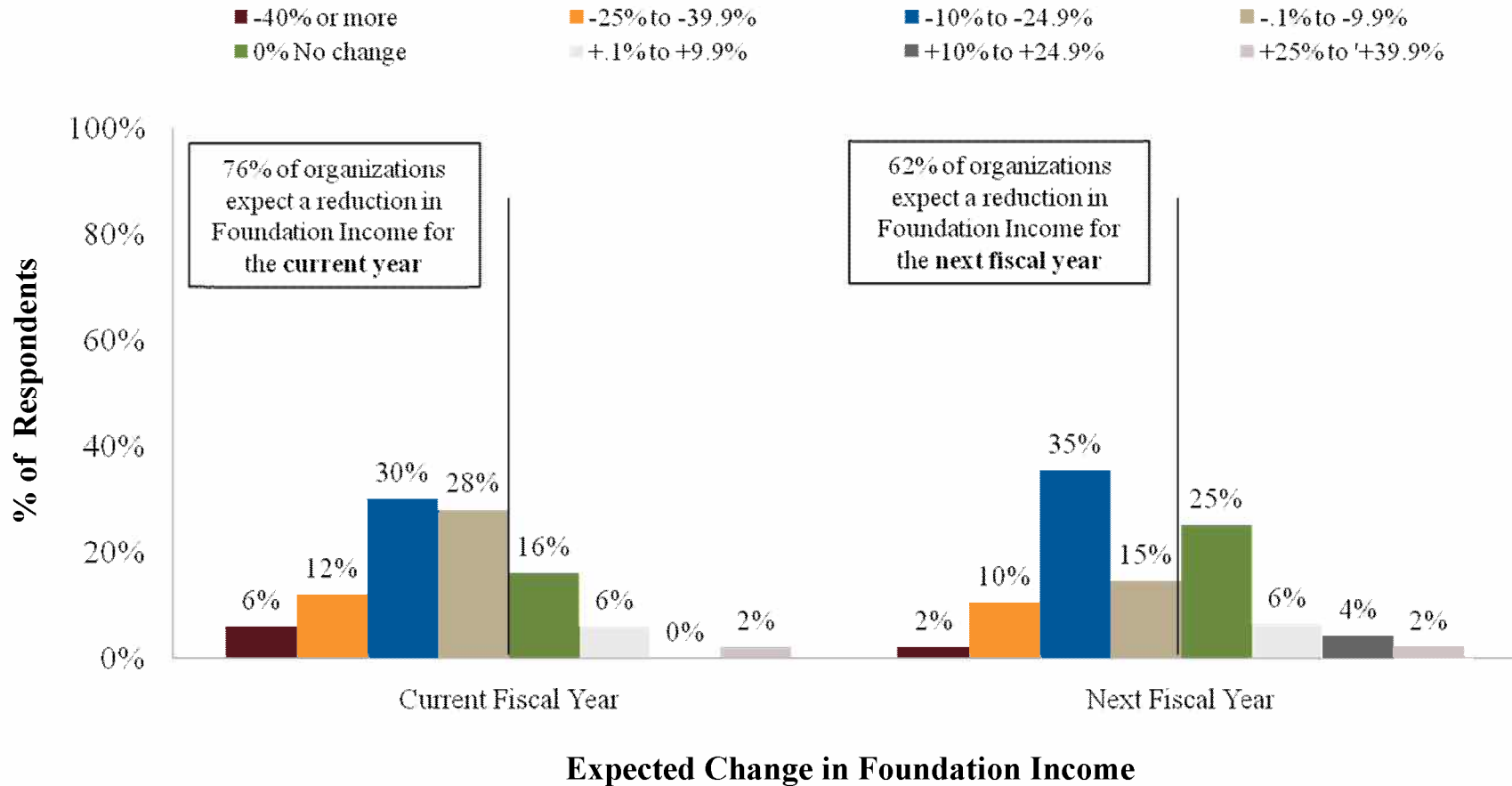


Changes in Income

Changes in Foundation Income Expectations

(Current Fiscal Year n=50; Next Fiscal Year n=48)

Q5/Q11: How much, if at all, are you altering your contributed income expectations for current/next fiscal year in each of the following categories?



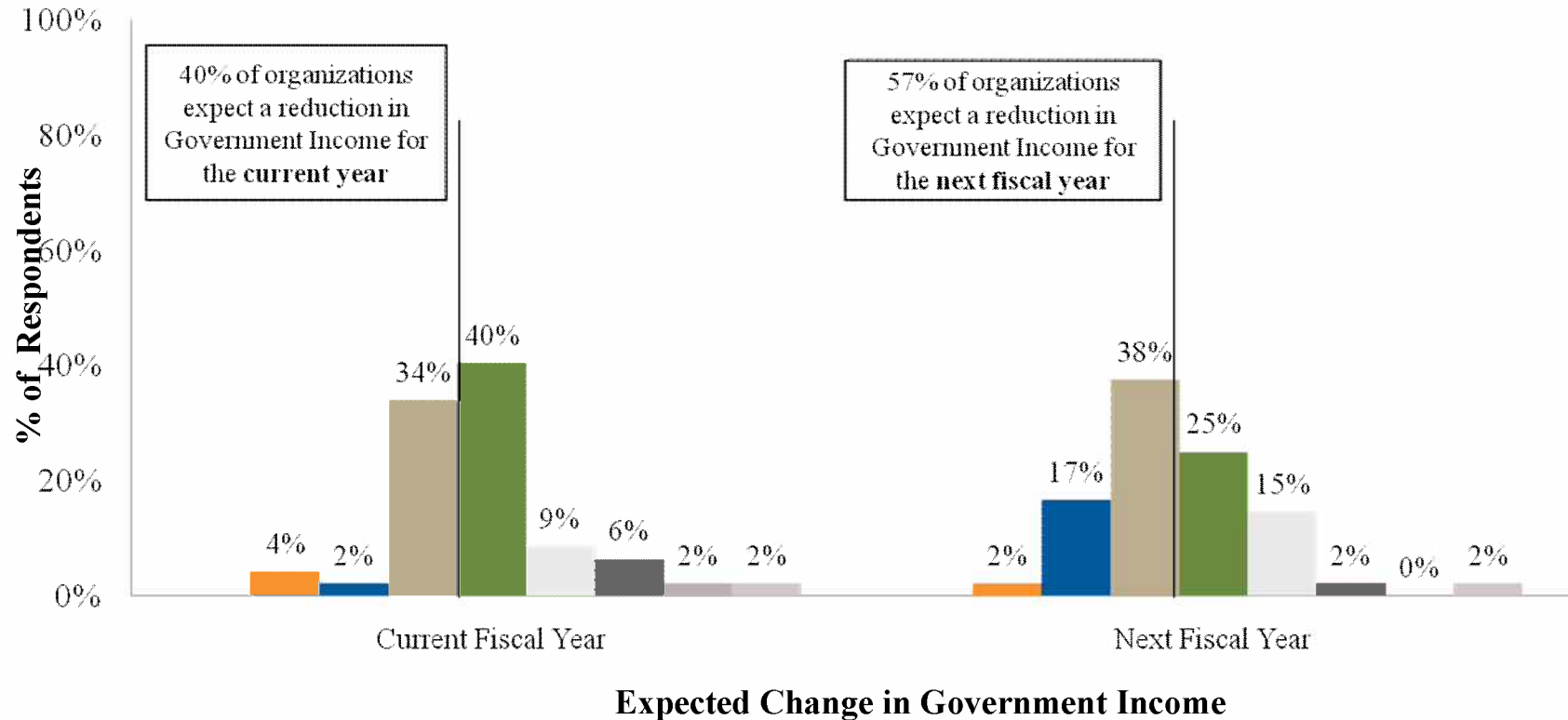
Changes in Income

Changes in Government Income Expectations

(Current Fiscal Year n=47; Next Fiscal Year n=48)

Q5/Q11: How much, if at all, are you altering your contributed income expectations for current/next fiscal year in each of the following categories?

- -40% or more
- -25% to -39.9%
- -10% to -24.9%
- -.1% to -9.9%
- 0% No change
- +.1% to +9.9%
- +10% to +24.9%
- +25% to +39.9%
- +40% or more



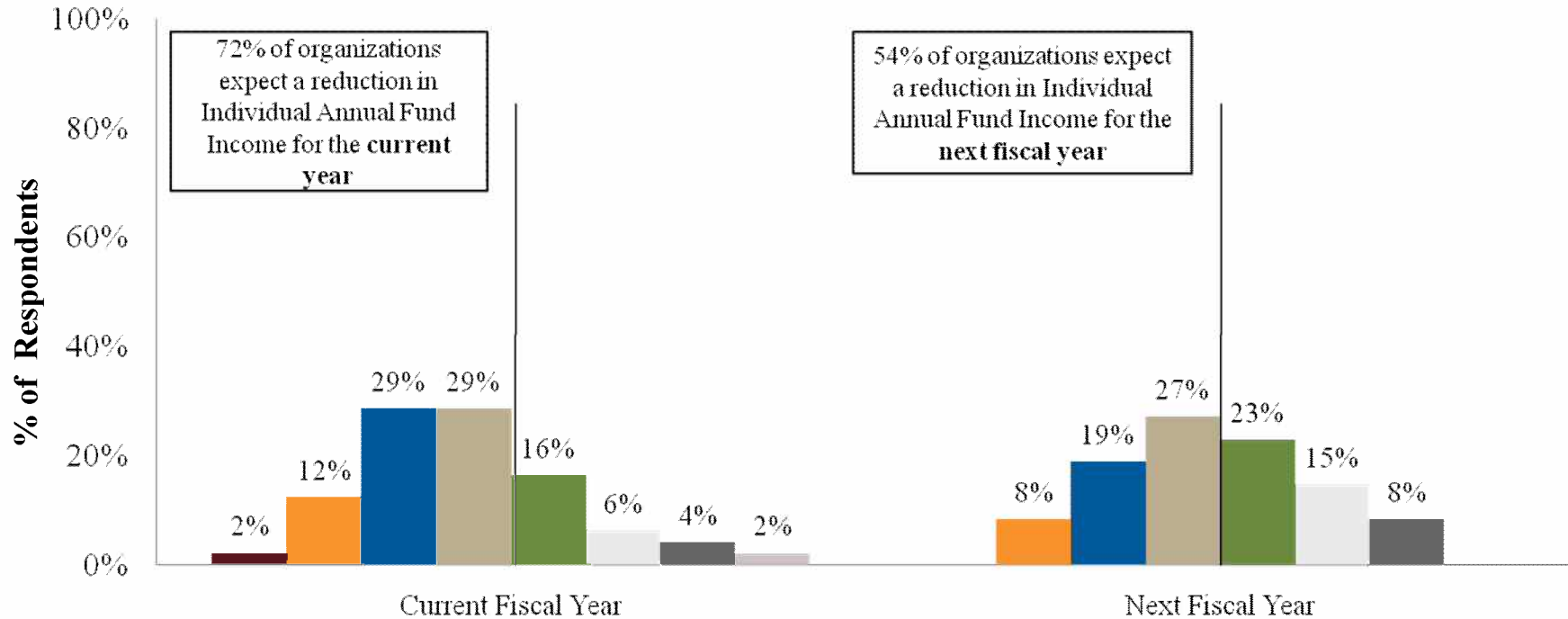
Income

Changes in Individual Annual Fund Income Expectations

(Current Fiscal Year n=49; Next Fiscal Year n=48)

Q5/Q11: How much, if at all, are you altering your contributed income expectations for current/next fiscal year in each of the following categories?

- -40% or more
- -25% to -39.9%
- -10% to -24.9%
- -.1% to -9.9%
- 0% No change
- +.1% to +9.9%
- +10% to +24.9%
- +25% to +39.9%



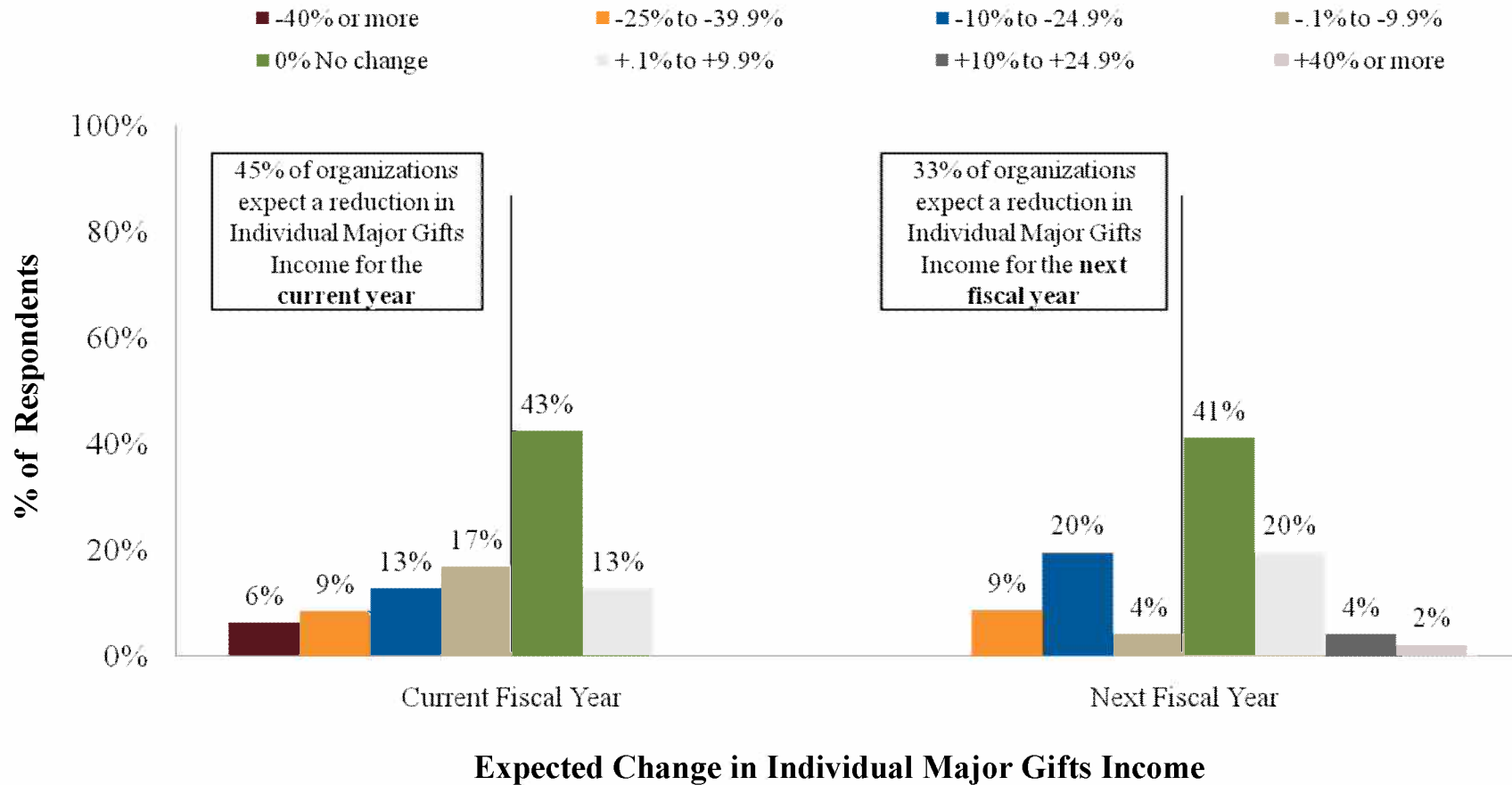
Expected Change in Individual Annual Fund Income

Changes in Income

Changes in Individual Major Gifts Income Expectations

(Current Fiscal Year n=47; Next Fiscal Year n=46)

Q5/Q11: How much, if at all, are you altering your contributed income expectations for current/next fiscal year in each of the following categories?

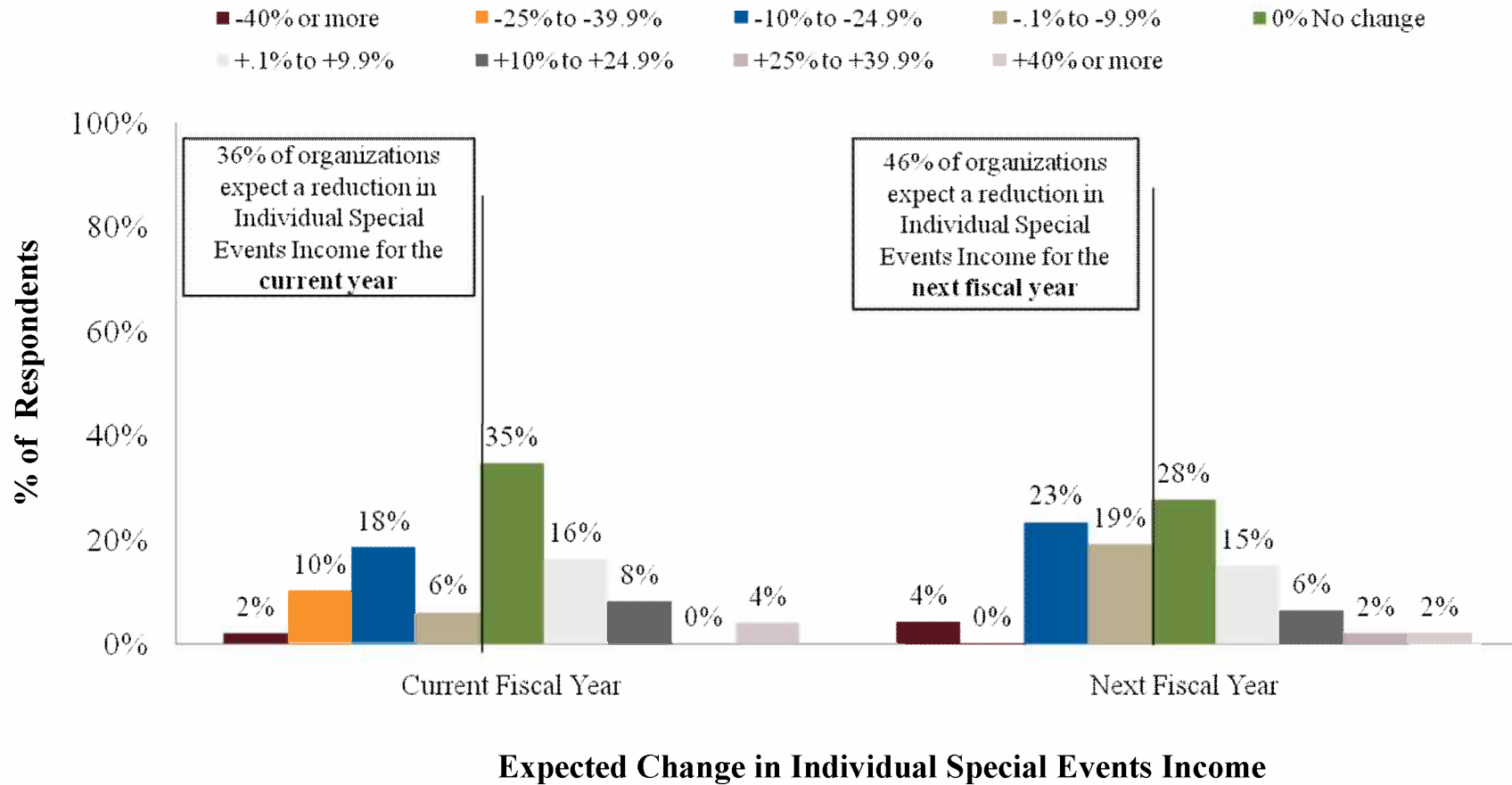


Changes in Income

Changes in Individual Special Events Income Expectations

(Current Fiscal Year n=49; Next Fiscal Year n=47)

Q5/Q11: How much, if at all, are you altering your contributed income expectations for current/next fiscal year in each of the following categories?



Percent of Organizations Expected Decrease in: Income, by Category

	Current Fiscal Year	Next Fiscal Year
Corporate Income	62%	61%
Foundation Income	76%	62%
Government Income	40%	57%
Individual Annual Fund Income	72%	54%
Individual Major Gifts Income	45%	33%
Individual Special Events Income	36%	46%

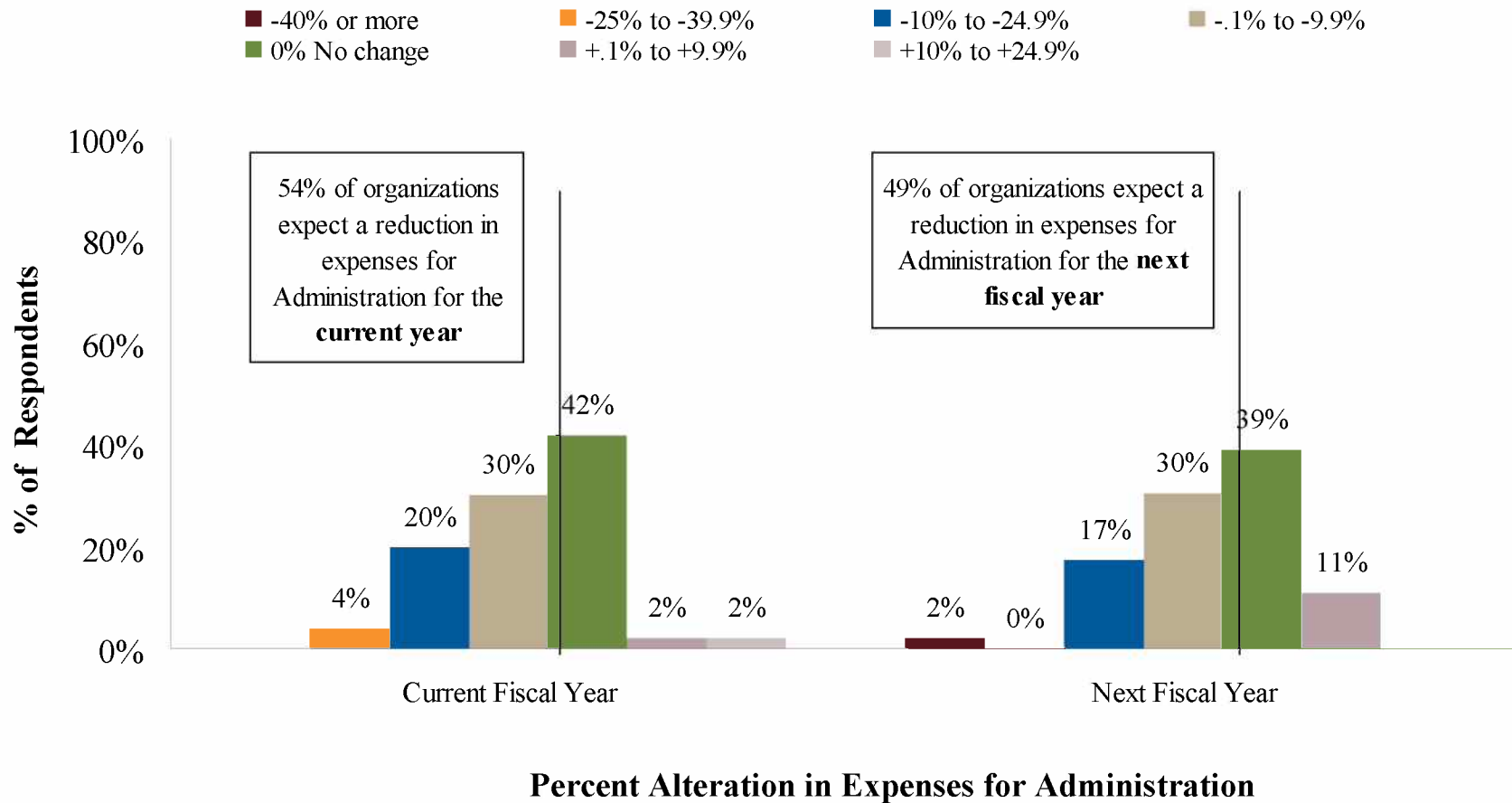
***Online Survey Results:
Changes in Expenses***

Changes in Expenses

Alterations in Expenditures On Administration

(Current Fiscal Year n=50; Next Fiscal Year n=46)

Q6/Q12: How much, if at all, are you altering your expenses for the current/next fiscal year in each of the following categories?

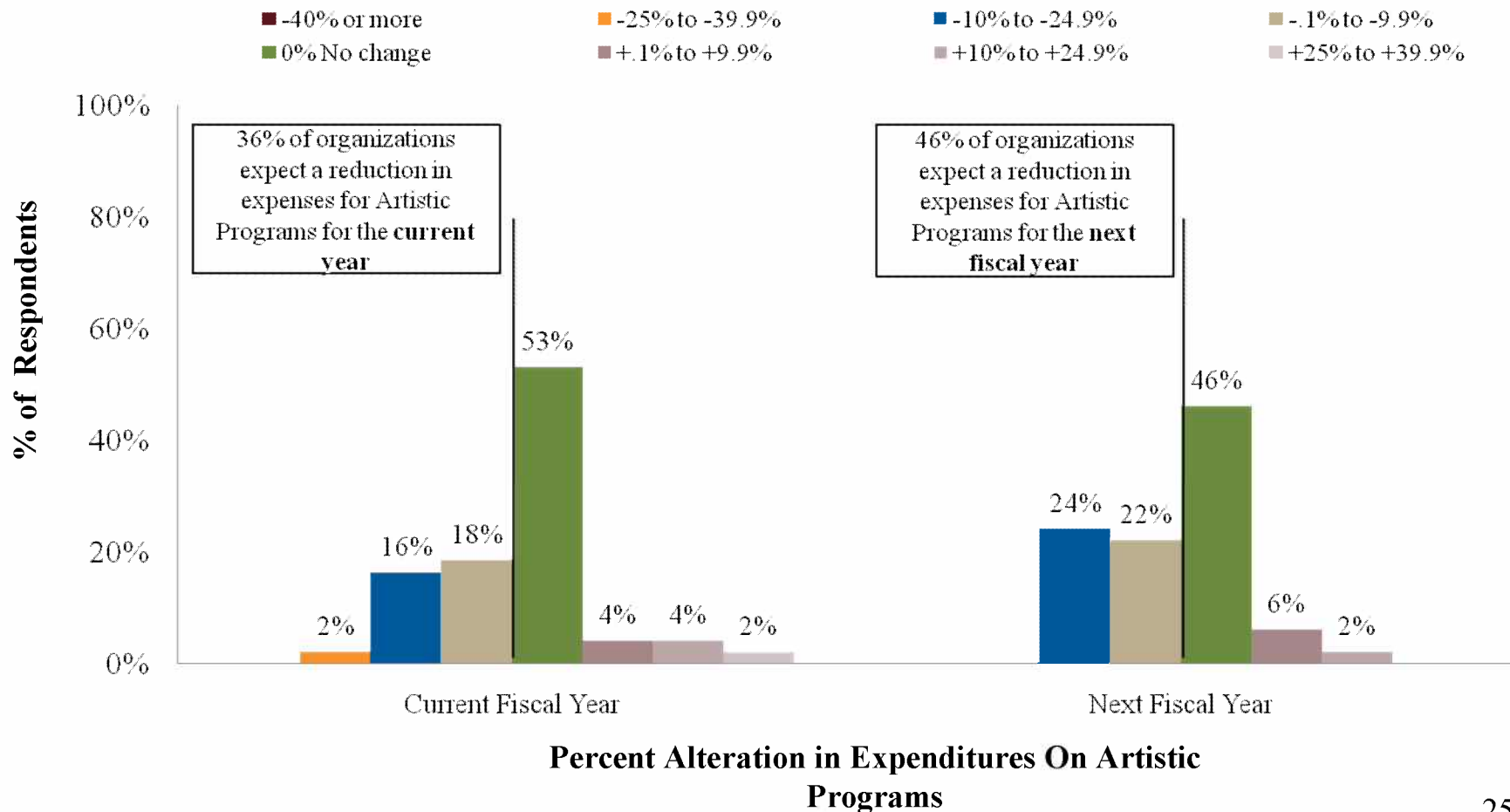


Changes in Expenses

Alterations in Expenditures On Artistic Programs

(Current Fiscal Year n=49; Next Fiscal Year n=46)

Q6/Q12: How much, if at all, are you altering your expenses for the current/next fiscal year in each of the following categories?

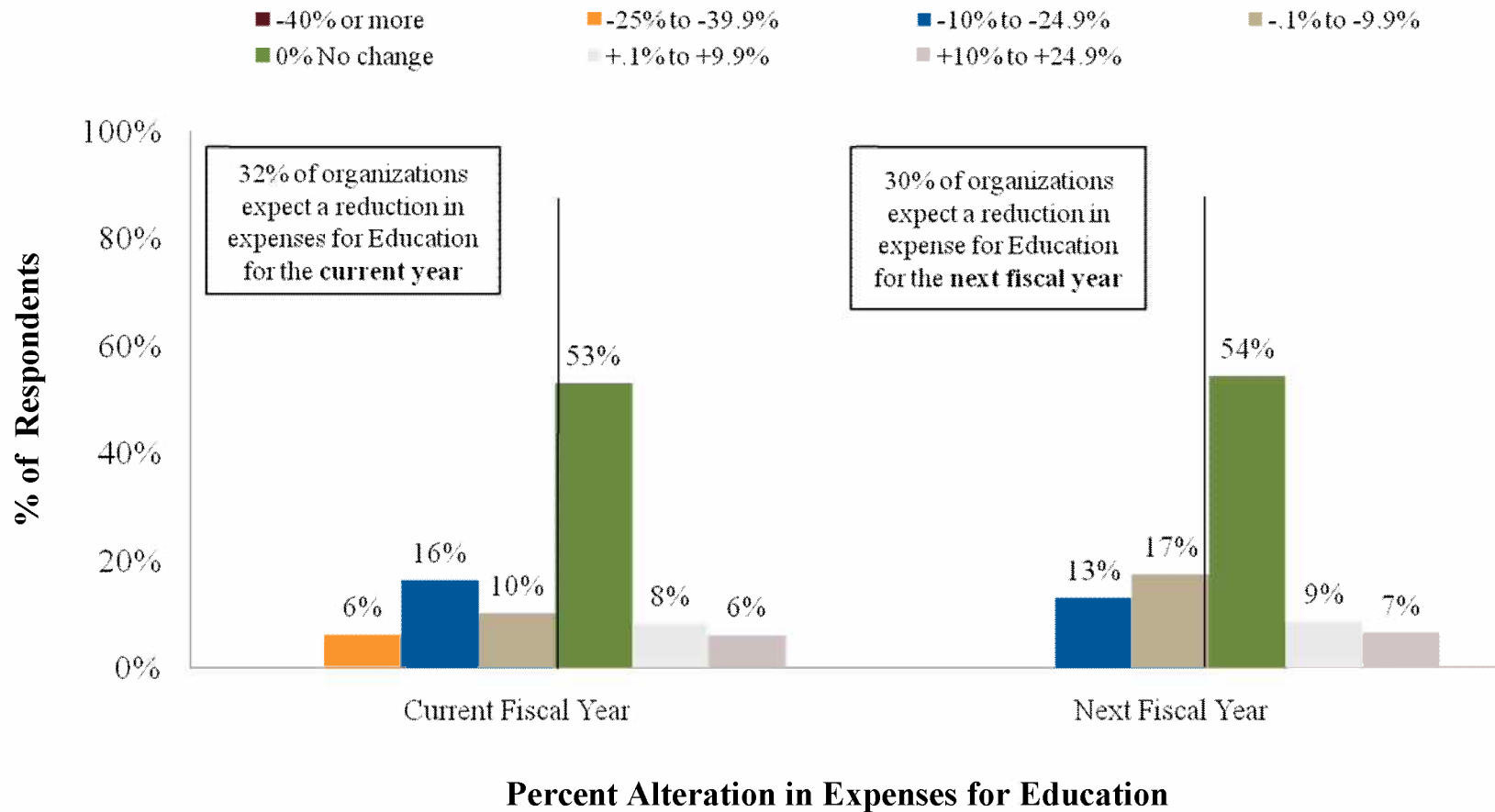


Changes in Expenses

Alterations in Expenditures On Education

(Current Fiscal Year n=49; Next Fiscal Year n=46)

Q6/Q12: How much, if at all, are you altering your expenses for the current/next fiscal year in each of the following categories?

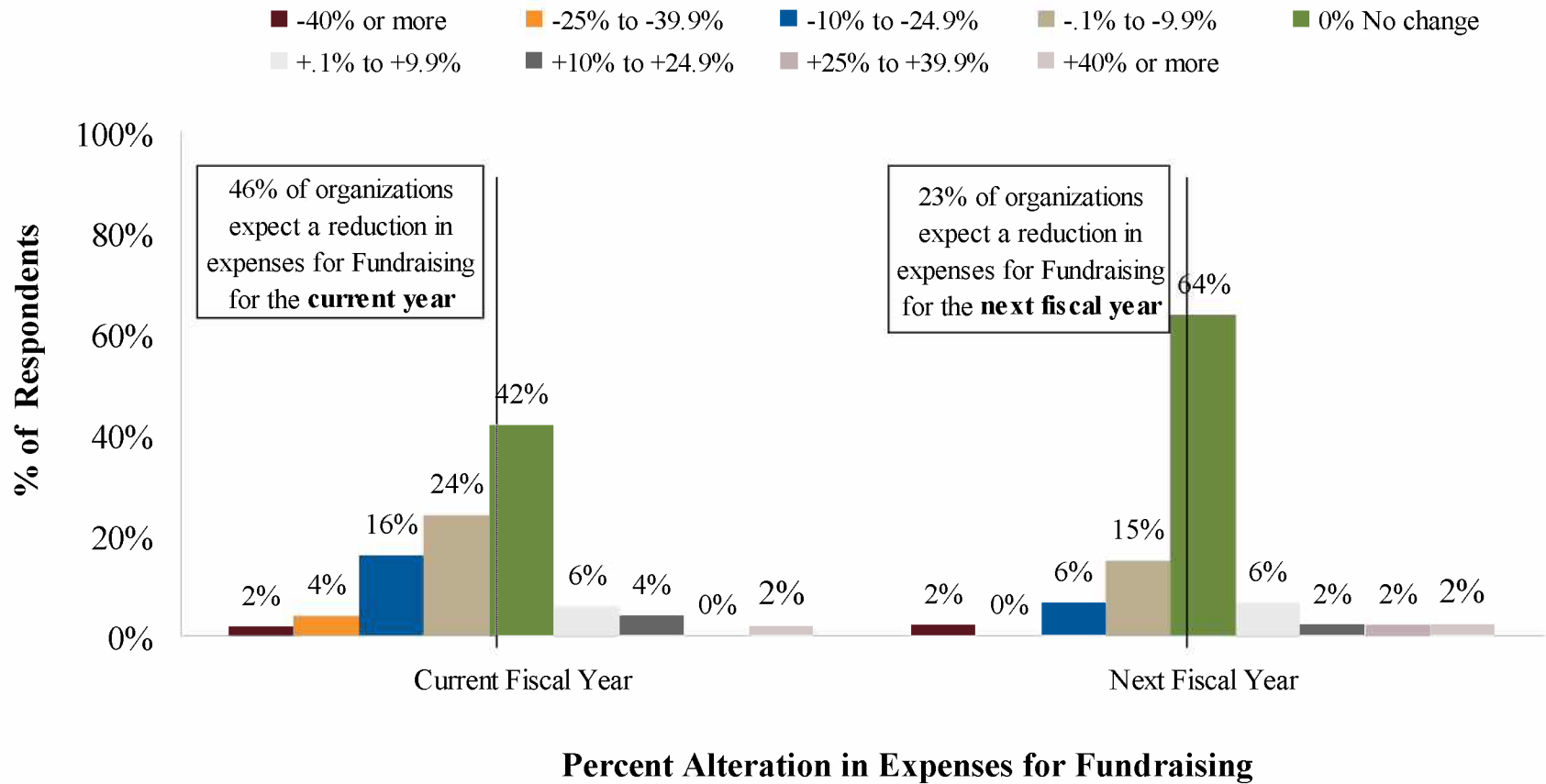


Changes in Expenses

Alterations in Expenditures On Fundraising

(Current Fiscal Year n=50; Next Fiscal Year n=47)

Q6/Q12: How much, if at all, are you altering your expenses for the current/next fiscal year in each of the following categories?

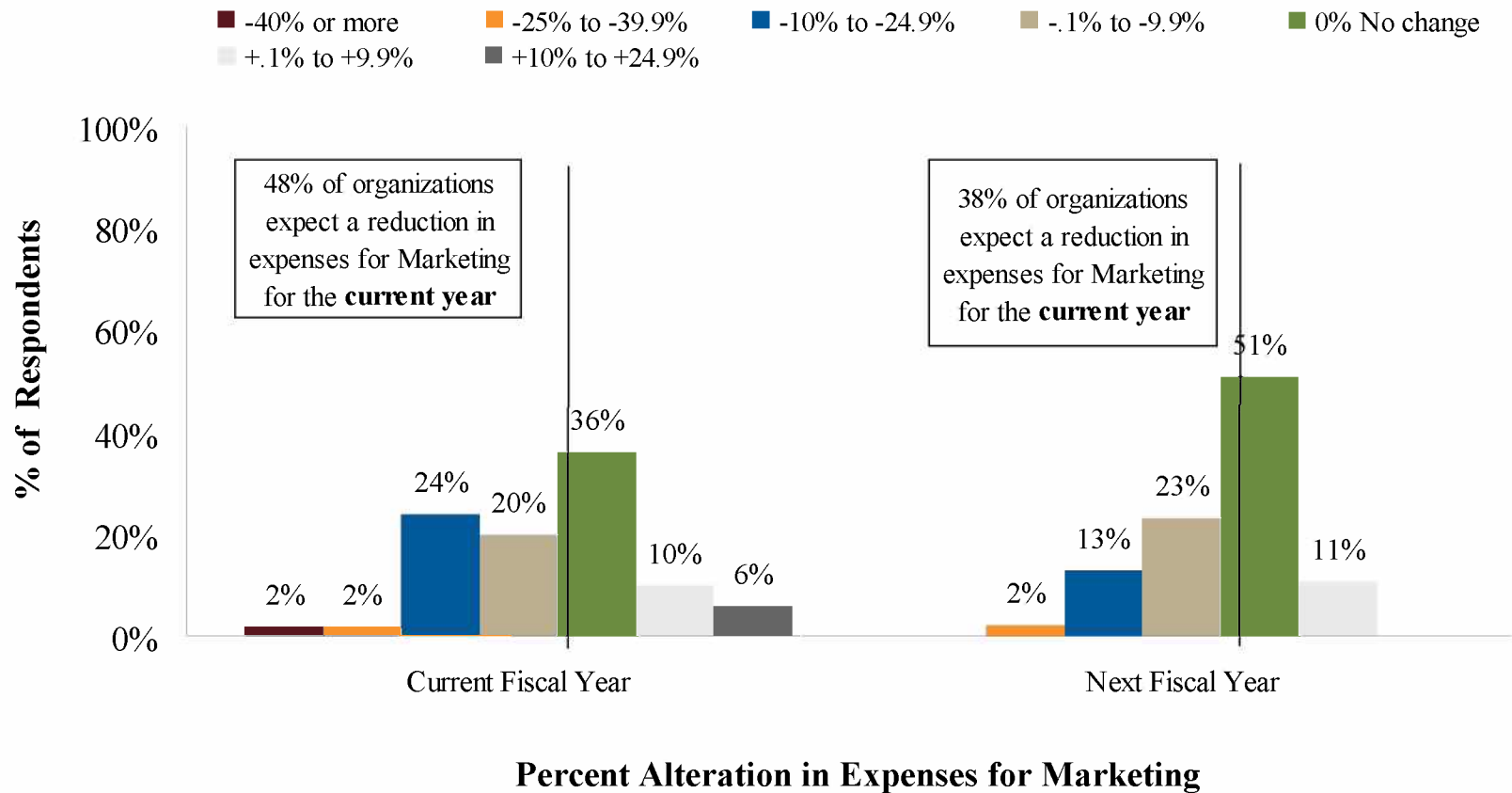


Changes in Expenses

Alterations in Expenditures On Marketing

(Current Fiscal Year n=50; Next Fiscal Year n=47)

Q6/Q12: How much, if at all, are you altering your expenses for the current/next fiscal year in each of the following categories?



*Percent of Organizations Expected Decrease:
Expenditures, by Category*

	Current Fiscal Year	Next Fiscal Year
Administration	54%	49%
Artistic Programs	36%	46%
Education	32%	30%
Fundraising	46%	23%
Marketing	48%	38%

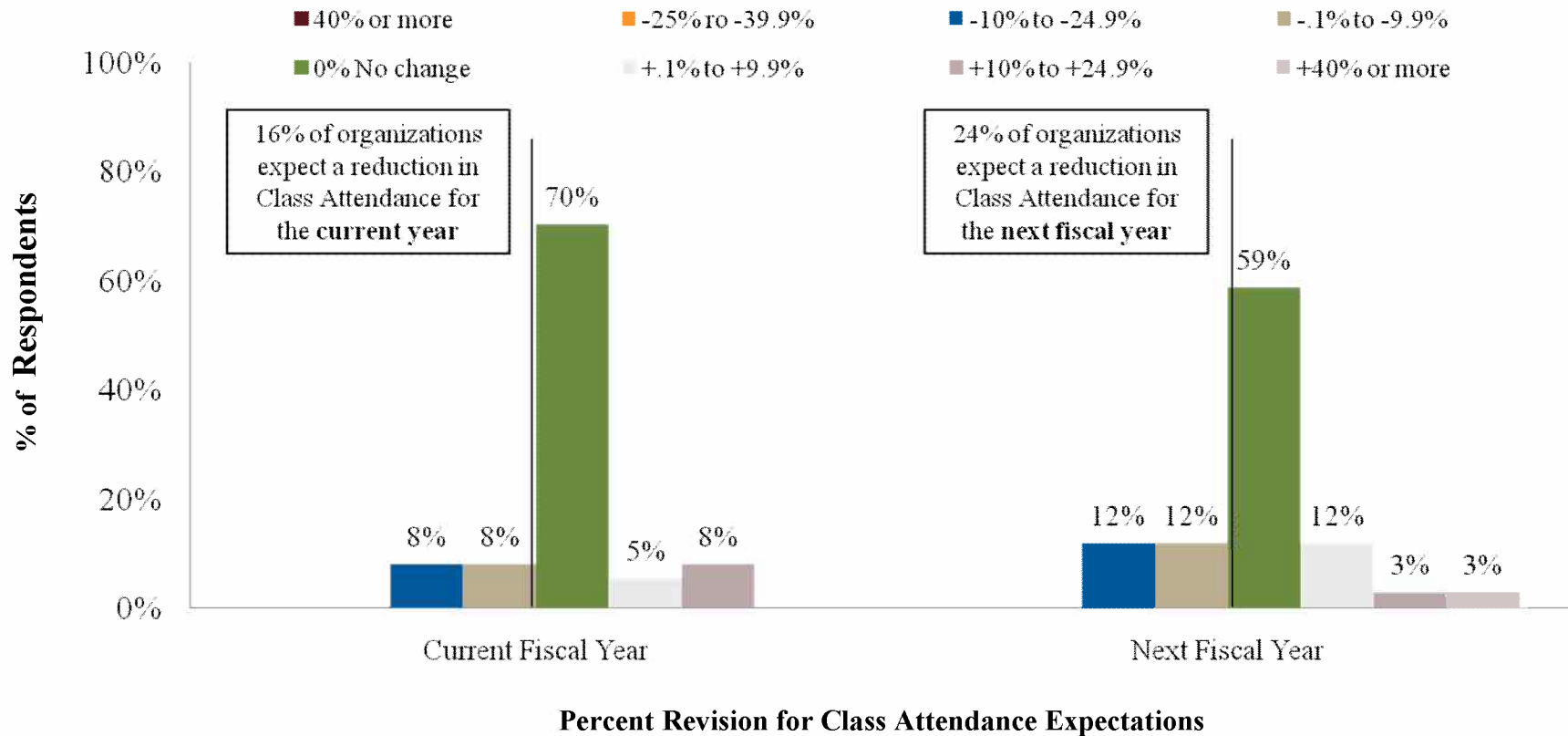
***Online Survey Results:
Changes in Event Attendance Expectations***

Changes in Event Attendance

Revisions for Class Attendance Expectations

(Current Fiscal Year n=37; Next Fiscal Year n=34)

Q7/Q13: How much, if at all, have you revised your attendance expectations for the current/next fiscal year in each of the following categories?

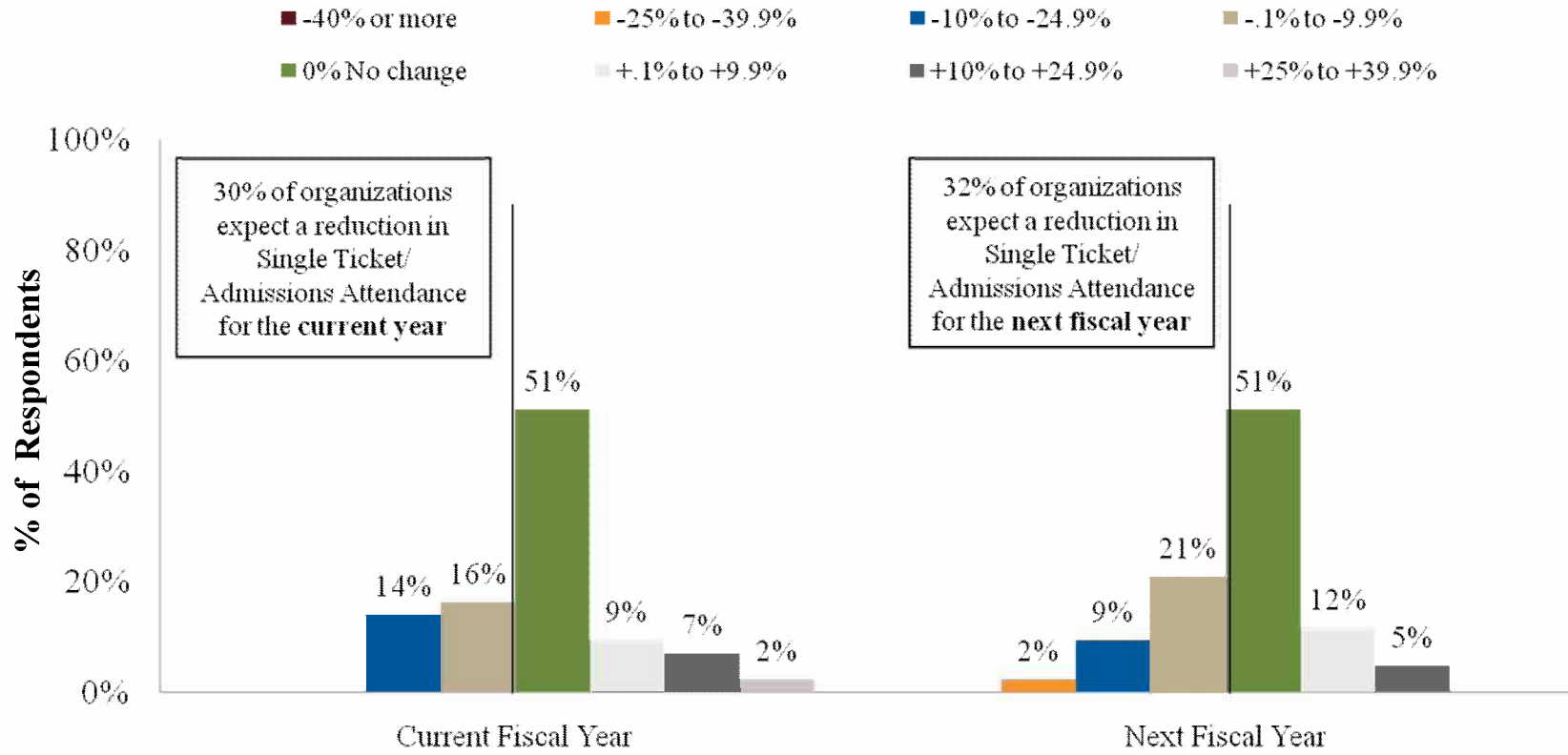


Changes in Event Attendance

Revisions for Single Ticket/Admissions Attendance Expectations

(Current Fiscal Year n=43; Next Fiscal Year n=43)

Q7/Q13: How much, if at all, have you revised your attendance expectations for the current/next fiscal year in each of the following categories?



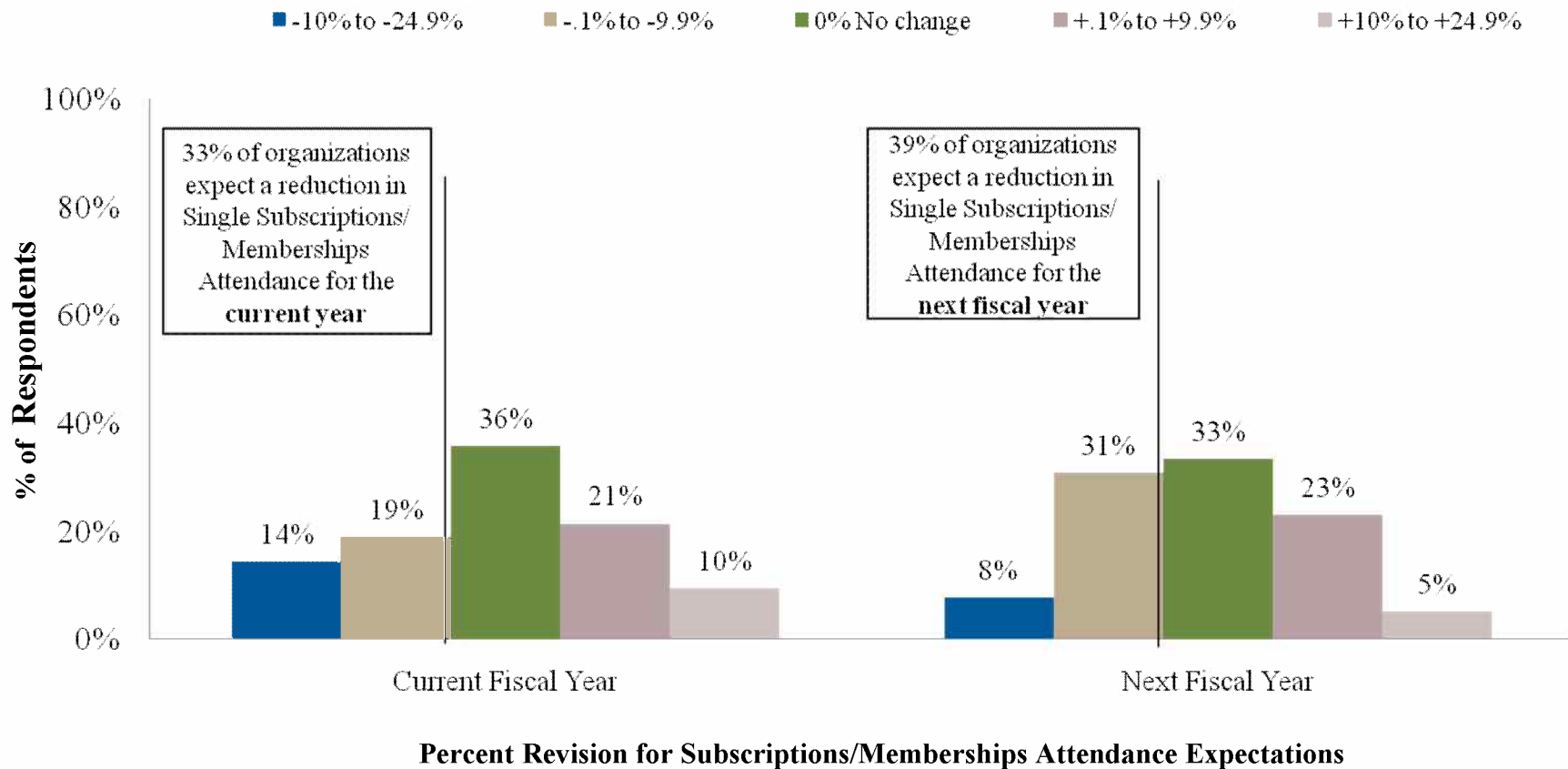
Percent Revision for Single Ticket/Admissions Attendance Expectations

Changes in Event Attendance

Revisions for Single Subscriptions/Memberships Attendance Expectations

(Current Fiscal Year n=42; Next Fiscal Year n=39)

Q7/Q13: How much, if at all, have you revised your attendance expectations for the current/next fiscal year in each of the following categories?



***Percent of Organizations Expected Decrease:
Attendance, by Category***

	Current Fiscal Year	Next Fiscal Year
Class Attendance	16%	24%
Single Ticket/ Admissions Attendance	30%	32%
Single Subscriptions or Memberships Attendance	33%	39%

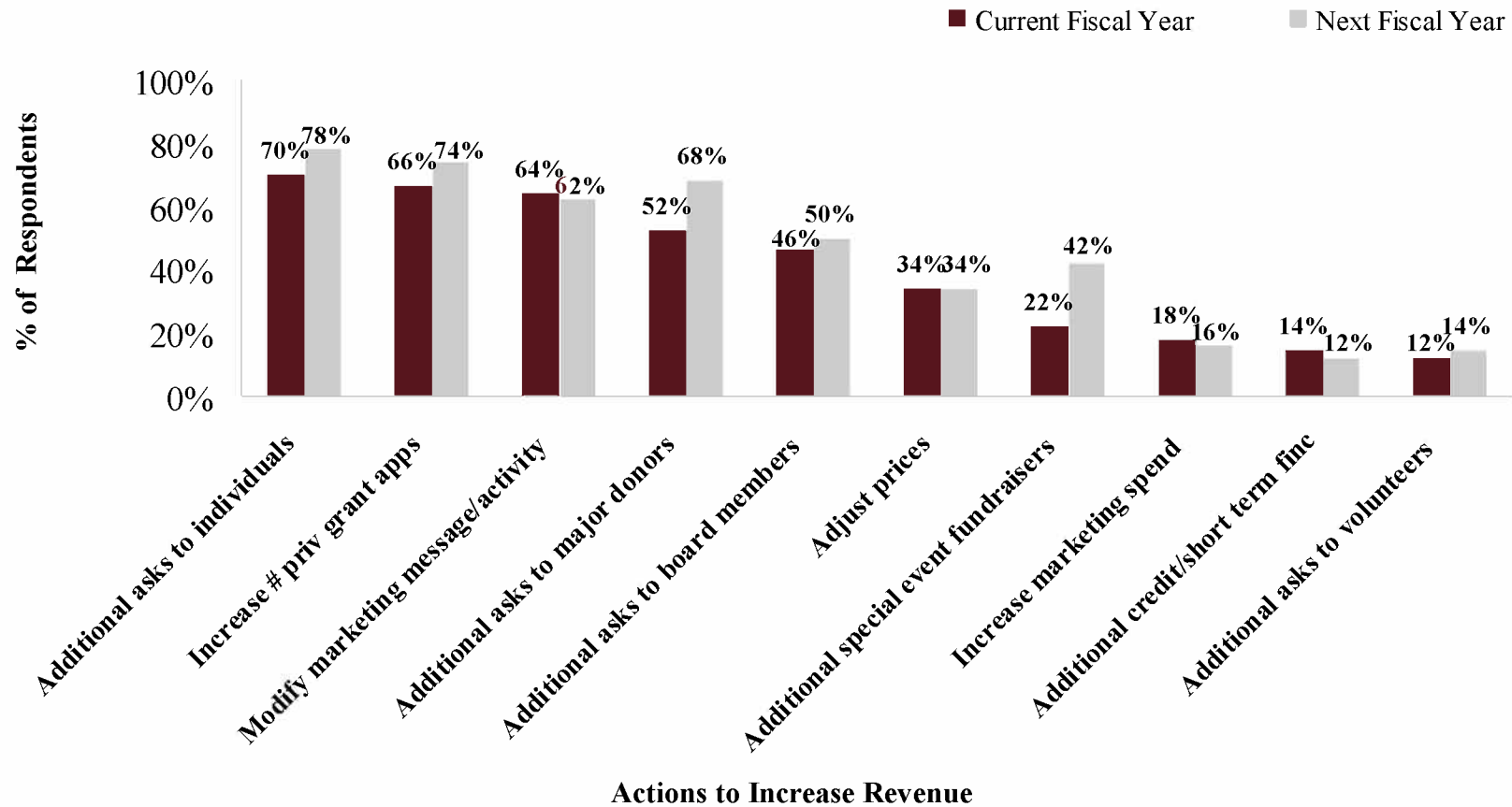
***Online Survey Results:
Actions to Increase Revenue / Decrease Costs***

Increase Revenue

Actions to Increase Revenue

(Current Fiscal Year n=51; Next Fiscal Year n=51)

Q8/Q14: In response to the current economic environment, what actions have you taken or do you plan to take to increase revenue in the current/next fiscal year? (check all that apply)

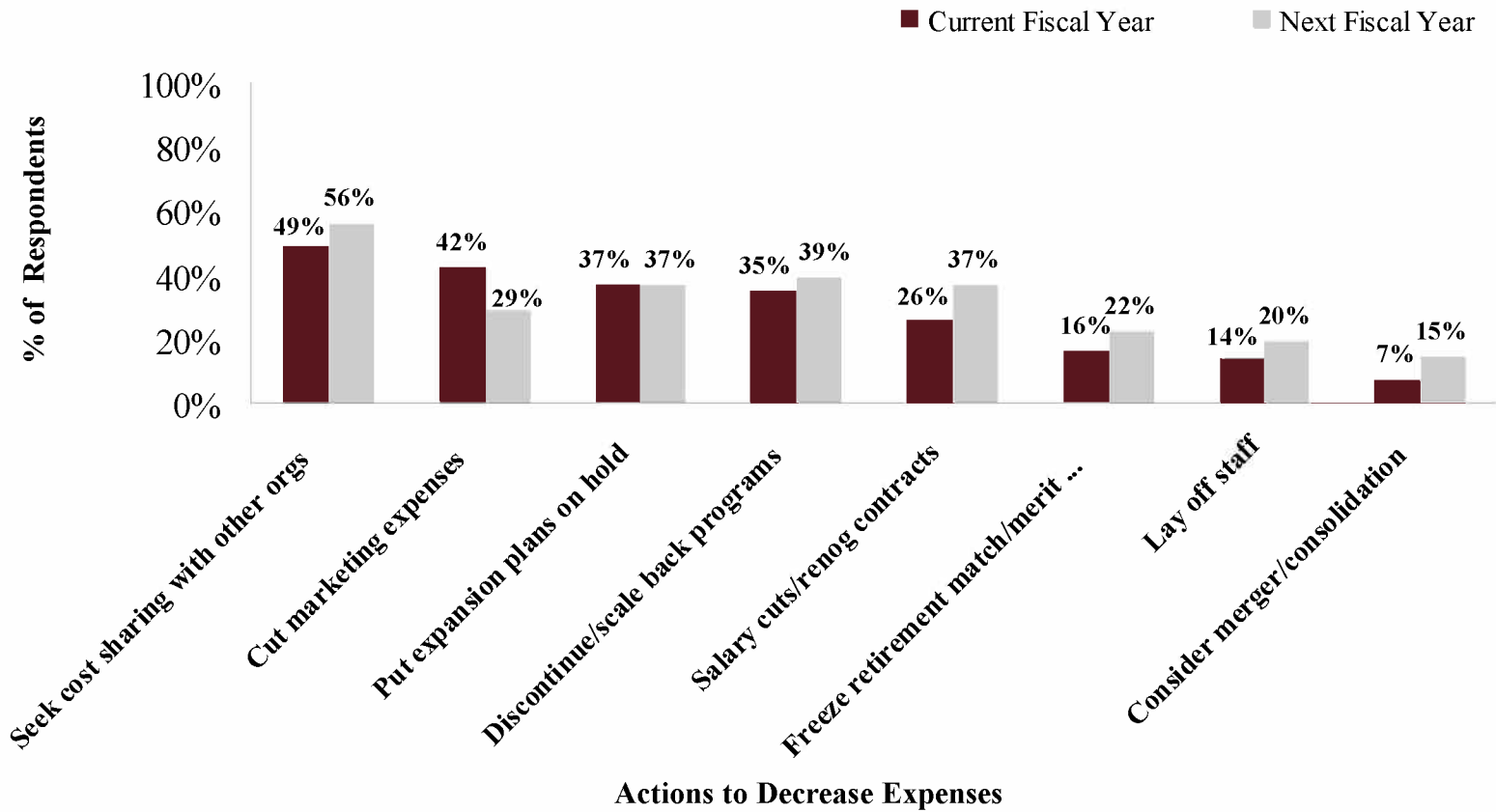


Decrease Expenses

Actions to Decrease Expenses

(Current Fiscal Year n=51; Next Fiscal Year n=27)

Q9/Q15: In response to the current economic environment, what actions have you taken or do you plan to take to increase revenue in the current/next fiscal year? (check all that apply)

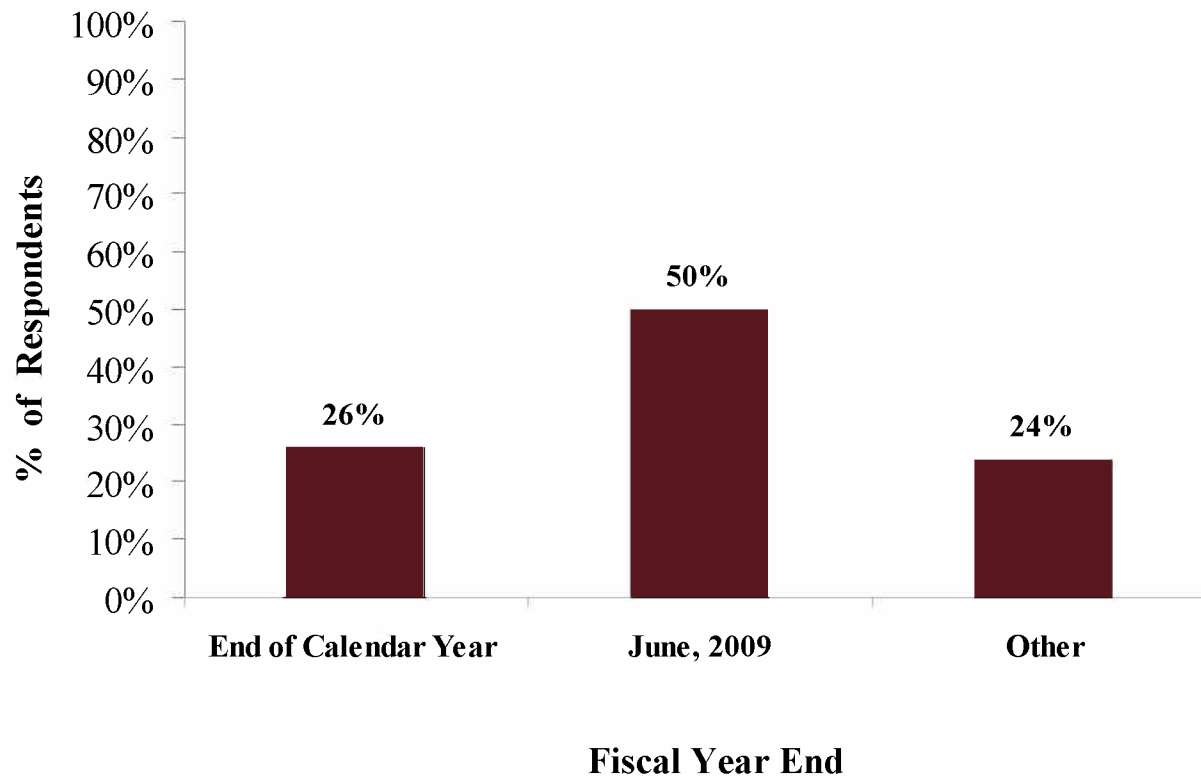


***Online Survey Results:
Firmographics***

Firmographics

Fiscal Year (n=32)

Q1: When will your current fiscal year end?

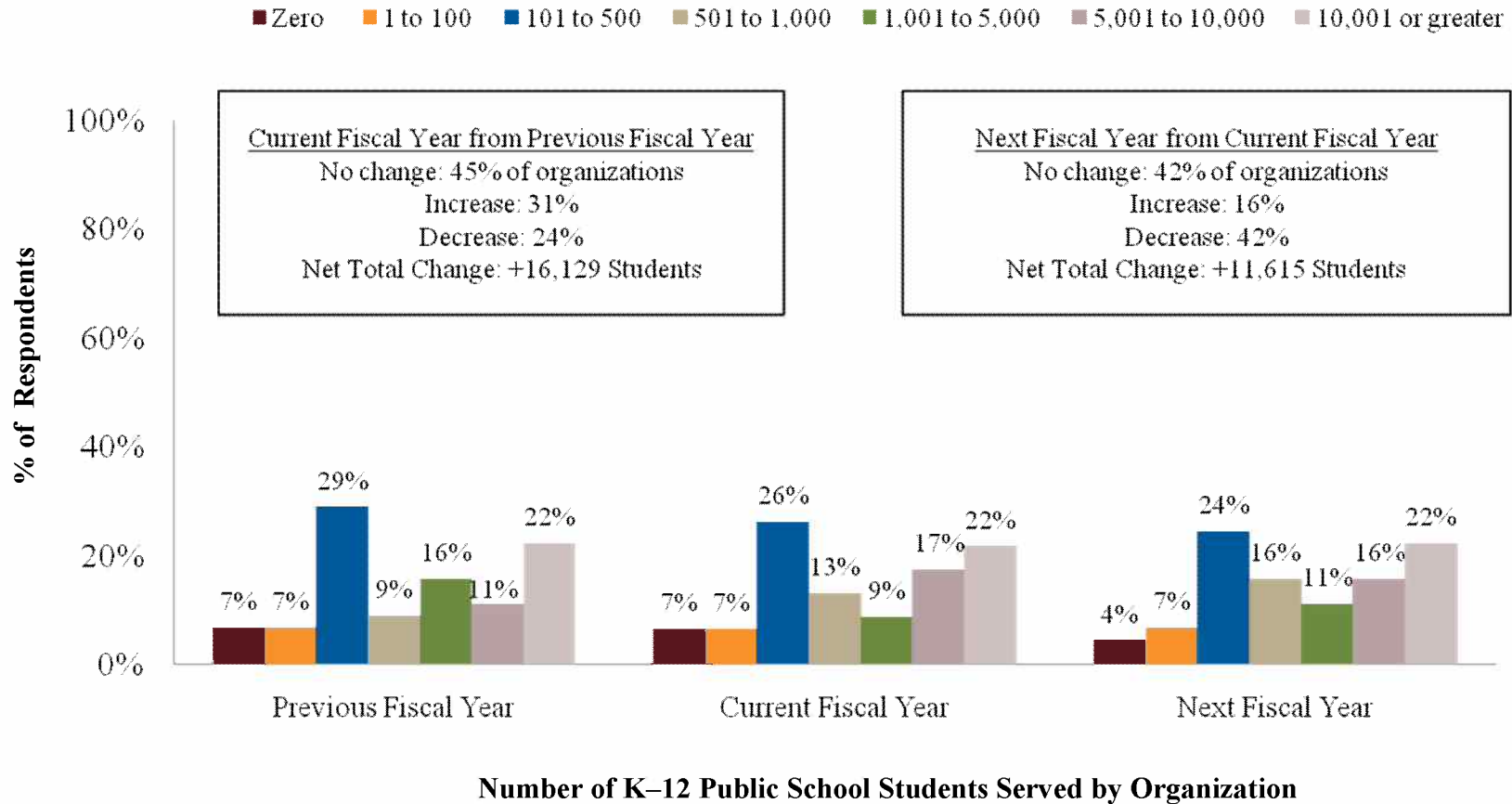


Public School Students Served

Number of K-12 Public School Students Served by Organization

(Previous Fiscal Year n=45; Current Fiscal Year n=46; Next Fiscal Year n=45)

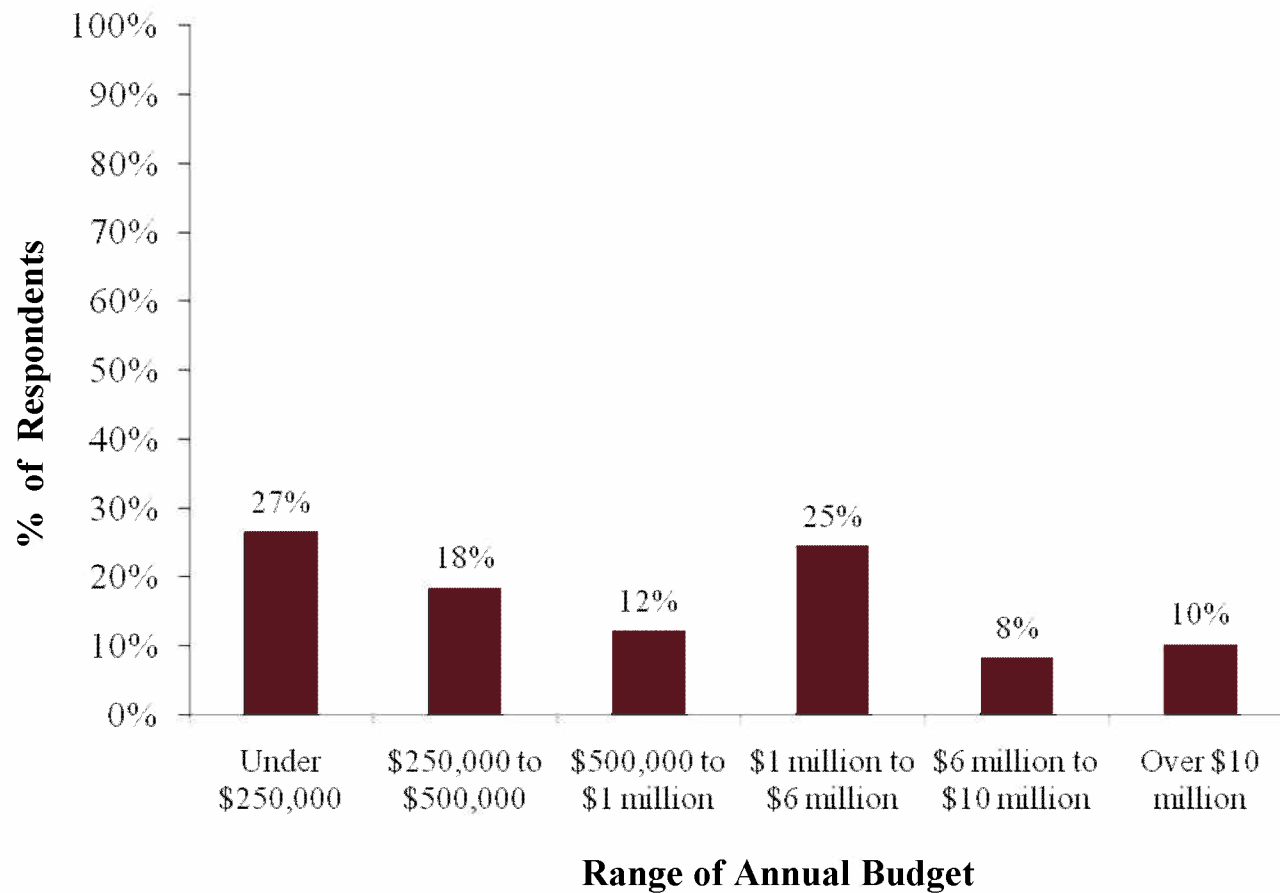
Q16: Please provide good-faith estimates of the number of K-12 public school students your organization served or expects to serve during the following periods:



Firmographics

Annual Budget (n=49)

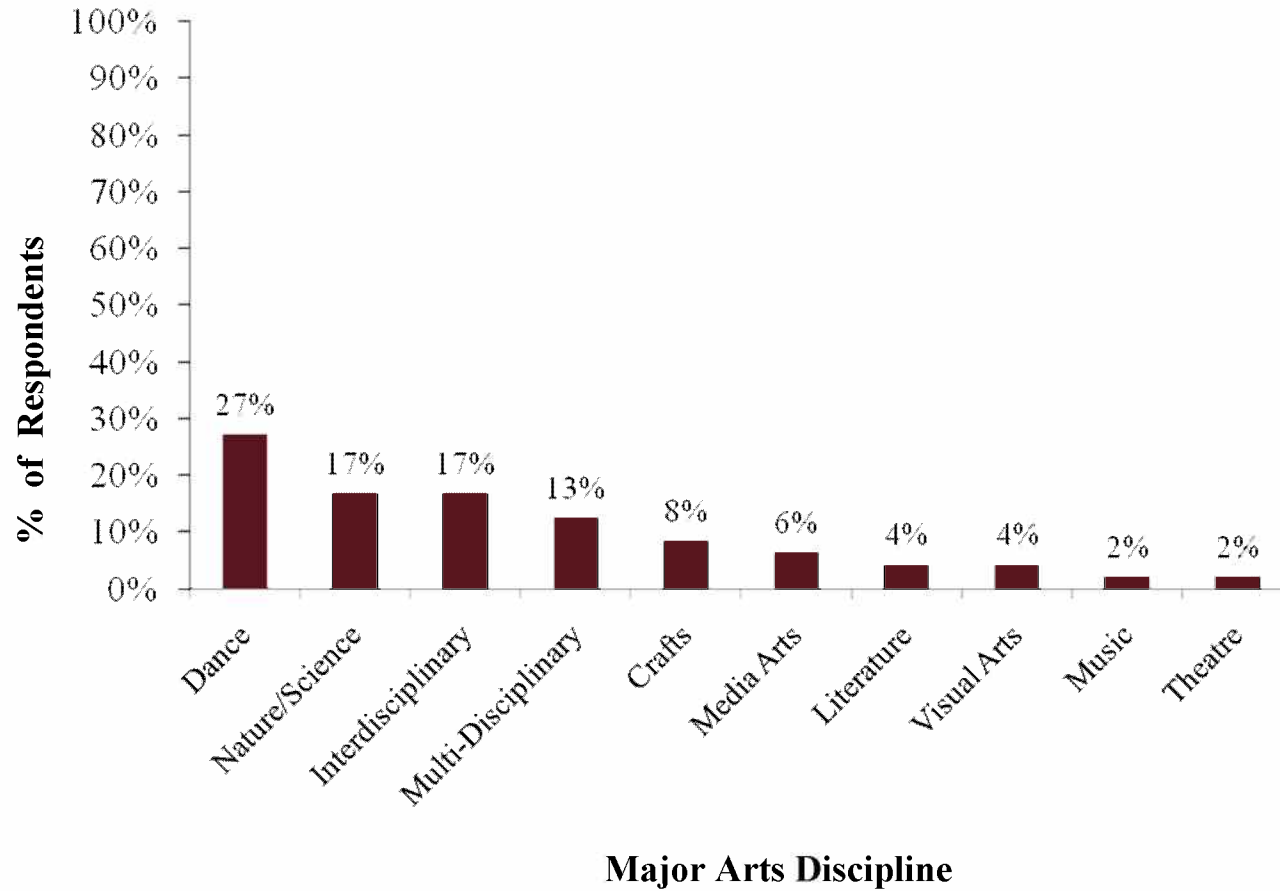
Q19: Into what range below does your annual budget fall?



Firmographics

Primary Discipline of Organization (n=48)

Q20: What is your organizations primary discipline?



Online Survey Key Findings and Next Steps

- ❖ Key findings:
 - ❖ Based on the results of the online survey analysis, Cuyahoga County's arts and culture sector currently is:
 - ❖ Comprised of more small arts and culture organizations than medium or large organizations (Median # of Full-Time Equivalent (FTE) employees = 5; Average # of FTE employees = 30; Range of FTE employees = 305.5).
 - ❖ Anticipating a decrease in staffing levels (-3% overall).
 - ❖ Expecting to cut expenditures in a variety of areas with no one area taking a large reduction.
 - ❖ Scaling down income projections.
 - ❖ Bolstering fundraising efforts.
 - ❖ Showing growth in its educational program categories.
 - ❖ Employing a majority of people who are not artists.

- ❖ Next steps:
 - ❖ These findings raise some questions that should be addressed in future dialogues between organizations in Cuyahoga County's arts and culture sector:
 - ❖ Is bolstering fundraising strategies the best course of action given that the downturn is adversely impacting individuals and funders as well? Is it realistic to expect more support from such sources as a solution to budgetary shortfalls?
 - ❖ Why is there slight growth in the education categories? For example, are organizations viewing this as a source of revenue replacement or is it because of increases in demand?
 - ❖ How adept are organizations at implementing the changes they seek to take in response to the economic crisis? Over time are the changes having the desired effects? How responsive are the organization's cultures to change in light of economic realities?

Qualitative Research Design

***CPAC's Arts and Cultural Roundtable:
May 1, 2009***

Facilitated Focus Groups Summary

- ❖ In a corresponding effort, CPAC held an Arts and Cultural Roundtable Seminar called “Surviving the Not-So-Great Recession,” where attendees were given the opportunity to listen to a keynote presentation made by Holly Sidford of the Helicon Collaborative on the research findings her firm collected in the Puget Sound region of Washington. After this presentation, participants were able to reflect upon and discuss the ramifications of the presentation in facilitated focus groups for various stakeholders: small arts and culture organizations, medium and large arts and culture organizations, artists, and funders.
- ❖ Breakout groups were asked to consider the following prompt:
 - ❖ Has the arts and culture sector kept pace with demographic, social and technological changes in the region? Does the economic recession highlight challenges that have been developing for years and underscore the need to reconfigure the sector if it is to thrive in the future? Is this a “tipping point” moment for the arts and culture sector to define the transformation that needs to take place, or will the sector have the transformation defined for them?
- ❖ Each group was asked to discuss the following questions:
 - ❖ What are the major changes in our environment to which we MUST adjust? What are the short-term actions that should be taken by artists, nonprofit arts and culture groups, funders, board members, and policy makers to enable arts and culture to strengthen its viability in this changing environment? Individually? Collectively?
 - ❖ What are inspiring examples of organizational adaptation (arts groups or funders, in or outside of Cleveland, in or outside the arts)? What lessons can we draw from these examples about the conditions that promote adaptation?
 - ❖ What are one or two action steps around which the region’s cultural sector could mobilize that would speed appropriate action?
- ❖ The following pages summarize the discussions that took place in the facilitated breakout sessions delineated by stakeholder group.

Small Orgs: Facilitated Focus Group Summary

- ❖ Major Changes:
 - ❖ Funding
 - ❖ Access to funding (especially if organizations lack long history)
 - ❖ Changing directions in funder priorities
 - ❖ Decline in corporate support and sponsorships
 - ❖ Media
 - ❖ Decline in print media and increased role of Internet
 - ❖ Increases demand for knowledge and manpower to fully utilize its potential.
 - ❖ Changes in Audience
 - ❖ Last minute audiences
 - ❖ School arts funding cuts
 - ❖ Increases demand for services at the local level which is good because it shows smaller organizations are valued but creates associated capacity issues.
- ❖ Inspiring Examples:
 - ❖ SALT (Sustainable Arts Leaders Talks)
 - ❖ A group of small arts and cultural organizations examining collaboration and shared needs and interests.
 - ❖ Philadelphia (The City of Cultural Arts)
 - ❖ Municipal government commitment to cultural engagement.
- ❖ Action Steps:
 - ❖ Think collaboratively, but consider organizational capacity
 - ❖ Cross sector and internal collaboration (criticism circles/collaborative membership/collaborative calendaring/web portals).
 - ❖ Look for proximate cities that may be potential partners.
 - ❖ Funding diversification (contributed and earned)
 - ❖ Consider programming in relationship to current audience needs and desires.
 - ❖ Consider arts and culture messaging.

Medium and Large Orgs: Facilitated Focus Group Summary

- ❖ Major Changes:
 - ❖ Urban sprawl/geographic distribution
 - ❖ Changing demographics
 - ❖ Aging (getting older)
 - ❖ Ethnic mix (very diverse)
 - ❖ Socio-economic status (SES) (declining)
 - ❖ Overall education and arts education levels

- ❖ Action Steps:
 - ❖ Focus on collaborative marketing to increase memberships
 - ❖ For example, connect to Positively Cleveland's work to improve guest services in the hospitality industry by way of being aware of and promoting arts and culture; include RTA
 - ❖ Speak with one unified arts and culture voice (noted this is part of CPAC's mission) and build a base of ambassadors
 - ❖ Adjust programming to respond to core audience— and understand what's core through knowing your 'customers'
 - ❖ Engage in broader conversations about shared services staff (i.e. IT, HR, Facilities)
 - ❖ Cross-promotion, shared ticketing strategies
 - ❖ Address attitudes about collaboration, and eliminate barriers to internal communication (silos syndrome)
 - ❖ Define goals and set criteria to define success before engaging in collaborations

Artists: Facilitated Focus Group Summary

- ❖ Major Changes:
 - ❖ Identifying viable locations to distribute, sell, and show artwork
 - ❖ For example, visual artists need to deal with gallery closings, start exploring social media outlets, and find time to develop work while staying afloat in new economic environment.
 - ❖ Financial downturn is twofold
 - ❖ Challenges for artists: maintaining home ownership, dealing with changing markets.
 - ❖ Challenges related to audience: what they want to buy, demand more affordability and function.
 - ❖ Finding creative ways to maintain relevancy as producers of art because arts consumers' demands are changing

- ❖ Inspiring Examples:
 - ❖ Detroit-Shoreway Neighborhood
 - ❖ Prime example of what can happen when inspired leadership, a supportive community development corporation, and a community of creatives come together and work for a common cause through collaboration.
 - ❖ Cleveland Bike Co-op
 - ❖ Important to get people out so they can interact with their city, have them explore, and take away a positive experience from their time in the city.
 - ❖ City of Santa Fe
 - ❖ Extremely supportive and transparent arts community, which is featured prominently in a substantial weekly insert in the local paper that details everything that is going on in the local arts community. City has open networks, and it is easy to get connected. Cleveland needs something similar because it is hard to know what is going on or get connected.

Artists: Facilitated Focus Group Summary (cont.)

- ❖ Action Steps:
 - ❖ Collaborate and form innovative partnerships with other artists and arts organizations
 - ❖ Find new uses for products or services (focus more on functional versus decorative value, produce more affordable works)
 - ❖ Arts community needs to fully unite to gain policymaker support and increase sector's visibility
 - ❖ More networking among those in the arts and culture sector as well as between the arts and culture sector and decision makers; need to create a centralized hub for artists to connect through
 - ❖ Create a more supportive arts and culture environment
 - ❖ Innovative financing models needed (microlending), expand artists options for getting funds
 - ❖ Be more proactive in addressing challenges, move beyond defensive positions
 - ❖ Stimulate more strategic thinking
 - ❖ Seek out opportunities and increase visibility by becoming more involved in your community
 - ❖ Technology sharing
 - ❖ Promote artists' inherent creativity to solve community problems
 - ❖ Identify a clear leader for the arts and culture sector

Funders: Facilitated Focus Group Summary

- ❖ Major Changes:
 - ❖ Issue 18 – it’s changed the environment, both for the good and for the not-so-good
 - ❖ Good – more resources, life line for some groups, important “proof” of arts community’s ability to mobilize and the value the arts have for the voting public
 - ❖ Not-so-good – some funders pulling back their arts support “because CAC will take care of it,” false inflation in the economy of resources, some organizations beginning to depend on this funding
 - ❖ Less cooperation among funders than in previous years
 - ❖ Foundations’ loss of assets
 - ❖ Corporate brain drain
 - ❖ For example, loss of companies, corporate leadership, corporate talent for boards, jobs and money
 - ❖ Population is shrinking, which creates tax base issues
 - ❖ Numerous capital campaigns underway, putting political pressure on foundation giving
- ❖ Inspiring Examples:
 - ❖ Cleveland’s Fund for Our Economic Future
 - ❖ CPAC itself. The organization was created by funders in response to the challenging arts and culture environment in northeast Ohio. CPAC was instrumental in getting legislation passed (Issue 18, cigarette tax dedicated to arts and culture sector); in this case, a small investment has leveraged more than \$180 million from Issue 18 revenues.
 - ❖ Great Lakes Science Center
 - ❖ Rock and Roll Hall of Fame
 - ❖ Ohio Cultural Data Project

Funders: Facilitated Focus Group Summary (cont.)

- ❖ Lessons from Examples:
 - ❖ Need sustained funder focus to achieve any substantive change
 - ❖ Arts need to be integrated into the whole community, collaborate with other sectors, be at the decision-making tables for the region (this is one of CPAC's significant achievements ... there's more to be done, but the arts are better integrated now into the fabric of the region's life)
 - ❖ Need stronger collaborative spirit, with a clear common goal and a willingness to compromise to achieve the goal
 - ❖ Funders need to be less prescriptive about organizations' operations ... let ideas bubble up and support concepts, avoid minutiae
 - ❖ Clear communication, and genuine listening, is crucial
- ❖ Action Steps:
 - ❖ Expanding the definition of art, including the full range of creative enterprise
 - ❖ Expanding community awareness of the arts and the benefits it provides individuals, neighborhoods, communities, regions
 - ❖ Arts and Kids initiative – arts education can be school-based, can be out-of-school, and should be both
 - ❖ Risk investment pool – funds for “big bets” or “game-changing” ideas that have long gestation period
 - ❖ Preparing the next generation of nonprofit leaders

Key Findings: Aspirations and Actions

- ❖ In the Roundtable focus groups several common aspirations and action steps emerged. Cuyahoga County’s arts and culture sector aspires to be:
 1. **Collaborative.**
 - ❖ Action: Cuyahoga County's arts and culture sector can evolve by revisiting old and exploring new opportunities for collaboration. Cuyahoga County’s arts and culture sector should focus its efforts on forming collaborations not only with those in the sector but with nontraditional partners external to the sector, considering cross sector and multi-city collaborations. Particular issues within the arts and culture sector related to marketing, problem solving, funding, and audience development seem well-suited for collaborative approaches. Artists and other arts and culture sector stakeholders should be empowered to seek out solutions and to find new ways of addressing their challenges through collaborations.
 2. **Engaging.**
 - ❖ Action: Cuyahoga County's arts and culture sector can grow by making more opportunities available for nontraditional audiences to experience arts and culture by considering what type of message or offerings will appeal to them specifically. A broader effort to inform Cuyahoga County’s audience and visitors through revamping an existing portal or creating a new publication of all the arts and culture activities Cuyahoga County has to offer may be warranted. The sector should above all else try to actively welcome and support new transplants to the area and those wanting to enter Cuyahoga County’s arts and culture sector. The sector should strive to have open and transparent networks to make this process intuitive.
 3. **Unified.**
 - ❖ Action: Cuyahoga County's arts and culture sector can evolve by selecting “Arts and Cultural Ambassadors” whose role will be to listen to arts and culture stakeholders and represent their views to decision makers such as funders, public officials or potential patrons. Speaking in one clear voice about issues impacting the arts and cultural sector was a theme echoed throughout the groups.

Key Findings and Recommendations (cont.)

- ❖ Based on the Roundtable focus groups, Cuyahoga County's arts and culture sector aspires to be (cont.):
 4. **Financially Stable.**
 - ❖ Action: Cuyahoga County's arts and culture sector can evolve by ensuring its funding streams are viable well into the future. The potential of micro-lending programs, incubators, and other innovative models should be explored.
 5. **Innovative.**
 - ❖ Action: Cuyahoga County's arts and culture sector can evolve by fully harnessing its inherent creativity and melding the voices of artists and non-artists to chart future directions and initiatives.
 6. **Reflective.**
 - ❖ Action: Cuyahoga County's arts and culture sector must be willing to critically assess how it is functioning and be willing to revisit programmatic offerings. Given current realities, organizations can no longer afford to maintain old programs for the sake of foregoing change or appeasing a small constituent base; organizations must constantly monitor their operating environment and be responsive to the needs and desires of core audiences.

Conclusion

Conclusion

- ❖ CPAC believes this exploration of the economic environment of Cuyahoga County's arts and culture sector from two different perspectives will encourage individual organizations to take stock of their internal operating environments and to consider what role their organization can and should play in these difficult economic times. Dismal economic times will undoubtedly lead organizations to have to make painful cuts or changes to their program offerings. However, such an environment affords Cuyahoga County's arts and culture organizations with an opportunity to strategically reorient given current and future economic, social and technological realities and challenges. Informed adjustments of this nature can ultimately help the sector to evolve, bridging the gap between reality and aspiration.

Appendix

Appendix – Online Survey Instrument

State of Arts & Culture 1st Quarter 2009

State of Cuyahoga County's Arts & Culture Organizations

The Community Partnership for Arts and Culture (CPAC) is conducting a brief survey of the state of Cuyahoga County's arts and culture organizations in the current economic climate. Please answer these questions to the best of your ability based upon top of mind information. CPAC is trying to formulate a snapshot of the sector. This information will be used to inform deliberations at an upcoming Arts & Cultural Roundtable meeting scheduled for May 1, 2009. As with past surveys, the responses of individual organizations will not be divulged. The results of this survey will only be shared in aggregate.

Thank you in advance for completing this survey by Friday, April 24, 2009. If you have any questions, please contact Megan Van Voorhis, Vice President, Community Partnership for Arts and Culture - (216) 575-0331 x 125.

CPAC would like to thank ArtsFund (Seattle, WA) for allowing us to build off of their survey tool.

1. Accounting Period

When will your current fiscal year end? MM / DD / YYYY

2. Workforce - CURRENT FISCAL YEAR

How many total full-time equivalent positions (FTEs) did your organization have at the beginning of this fiscal year?

3. Workforce - CURRENT FISCAL YEAR

How many full-time equivalent positions (FTEs) did your organization have at the beginning of this fiscal year in each category?

Administrative	<input type="text"/>
Artistic	<input type="text"/>
Education	<input type="text"/>
Fundraising	<input type="text"/>
Marketing	<input type="text"/>

Current Fiscal Year Projections

Appendix – Online Survey Instrument

State of Arts & Culture 1st Quarter 2009

4. Workforce-CURRENT FISCAL YEAR

What changes in your workforce do you now expect in the following categories during this fiscal year?

Changes in workforce

Administrative	<input type="text"/>
Artistic	<input type="text"/>
Education	<input type="text"/>
Fundraising	<input type="text"/>
Marketing	<input type="text"/>

5. Income-CURRENT FISCAL YEAR

How much--if at all--are you altering your contributed income expectations for the current fiscal year in each of the following categories (i.e. changes from budget established at beginning of fiscal period)?

	-40% or more	-25% to 39.9%	-10% to 24.9%	-.1% to 9.9%	0% (no change)	+.1% to 9.9%	+10% to 24.9%	+25% to 39.9%	+40% or more
Corporate	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Foundation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Government	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Individual-Annual Fund	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Individual-Major Gifts	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Individual-Special Event Income	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Appendix – Online Survey Instrument

State of Arts & Culture 1st Quarter 2009

6. Expense-CURRENT FISCAL YEAR

How much--if at all--are you altering your expenses for the current fiscal year in each of the following categories (i.e. changes from budget established at beginning of fiscal period)?

	-40% or more	-25% to 39.9%	-10% to 24.9%	-.1% to 9.9%	0% (no change)	+1.1 to 9.9%	+10% to 24.9%	+25% to 39.9%	+40% or more
Administration	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Artistic programs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Education	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Fundraising	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Marketing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

7. Attendance-CURRENT FISCAL YEAR

How much--if at all--have you revised your attendance expectations for the current fiscal year in each of the following categories (i.e. from the attendance goals you set at the beginning of the fiscal period)?

	-40% or more	-25% to 39.9%	-10% to 24.9%	-.1% to 9.9%	0% (no change)	+1.1 to 9.9%	+10% to 24.9%	+25% to 39.9%	+40% or more
Classes	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Single tickets/admissions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Subscriptions/memberships	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Appendix – Online Survey Instrument

State of Arts & Culture 1st Quarter 2009

8. In response to the current economic environment, what actions have you taken or do you plan to take to increase revenue in the CURRENT FISCAL YEAR? (Check all that apply)

- Increase marketing spending
- Modify marketing messages or other marketing activities
- Adjust prices
- Increase number of private grant applications
- Additional asks to individuals
- Make additional personal asks with major donors
- Host additional special event fundraiser(s)
- Make additional asks to board members
- Make additional asks to volunteers
- Seek additional line(s) of credit or other sources of short term financing

Other (please specify)

Appendix – Online Survey Instrument

State of Arts & Culture 1st Quarter 2009

9. In response to the current economic environment, what actions have you already or do you plan to take to decrease expenses in the CURRENT FISCAL YEAR? (Check all that apply)

- Discontinue or scale back program(s)
- Put expansion plans on hold
- Cut marketing expenses
- Seek cost sharing with other organizations
- Consider a merger or consolidation
- Lay off staff
- Salary cuts or renegotiate contracts
- Freeze retirement matching or merit increase

Other (please specify)

Next Fiscal Year Projections

10. Workforce-NEXT FISCAL YEAR

What changes in your workforce do you now expect in the following categories during NEXT fiscal year?

Changes in workforce	
Administrative	<input type="text"/>
Artistic	<input type="text"/>
Education	<input type="text"/>
Fundraising	<input type="text"/>
Marketing	<input type="text"/>

Appendix – Online Survey Instrument

State of Arts & Culture 1st Quarter 2009

11. Income-NEXT FISCAL YEAR

How much--if at all--are you altering your contributed income expectations for NEXT fiscal year in each of the following categories?

	-40% or more	-25% to 39.9%	-10% to 24.9%	-.1% to 9.9%	0% (no change)	+1.1% to 9.9%	+10% to 24.9%	+25% to 39.9%	+40% or more
Corporate	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Foundation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Government	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Individual-Annual Fund	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Individual-Major Gifts	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Individual-Special Events	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

12. Expense-NEXT FISCAL YEAR

How much--if at all--are you altering your expenses for NEXT fiscal year in each of the following categories?

	-40% or more	-25% to 39.9%	-10% to 24.9%	-.1% to 9.9%	0% (no change)	+1.1% to 9.9%	+10% to 24.9%	+25% to 39.9%	+40% or more
Administration	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Artistic programs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Education	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Fundraising	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Marketing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Appendix – Online Survey Instrument

State of Arts & Culture 1st Quarter 2009

13. Attendance-NEXT FISCAL YEAR

How much--if at all--have you revised your attendance expectations for NEXT fiscal year in each of the following categories?

	-40% or more	-25% to 39.9%	-10% to 24.9%	-.1% to 9.9%	0% (no change)	+1.1% to 9.9%	+10% to 24.9%	+25% to 39.9%	+40% or more
Classes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Single tickets/admissions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Subscriptions/memberships	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

14. In response to the current economic environment, what actions have you taken or do you plan to take to increase revenue in the NEXT FISCAL YEAR? (Check all that apply)

- Increase marketing spending
- Modify marketing messages or other marketing activities
- Adjust prices
- Increase number of private grant applications
- Additional asks to individuals
- Make additional personal asks with major donors
- Host additional special event fundraiser(s)
- Make additional asks to board members
- Make additional asks to volunteers
- Seek additional line(s) of credit or other sources of short term financing

Other (please specify)

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State of Arts & Culture 1st Quarter 2009

15. In response to the current economic environment, what actions have you already or do you plan to take to decrease expenses in the NEXT FISCAL YEAR? (Check all that apply)

- Discontinue or scale back program(s)
- Put expansion plans on hold
- Cut marketing expenses
- Seek cost sharing with other organizations
- Consider a merger or consolidation
- Lay off staff
- Salary cuts or renegotiate contracts
- Freeze retirement matching or merit increase

Other (please specify)

Education

16. Please provide good-faith estimates of the number of K-12 public school students your organization served or expects to serve during the following periods:

Total served in PREVIOUS fiscal year

Total you expect to serve in CURRENT fiscal year

Total you expect to serve in NEXT fiscal year

17. What is the PRIMARY reason for expected changes in numbers of students served (if any) reported in the previous question?

Appendix – Online Survey Instrument

State of Arts & Culture 1st Quarter 2009

Changes in Services, Demographics and Contact Information

18. What, if any, reductions in your organization's services to the public do you anticipate as a result of the current economic crisis?

19. Into what range below does your annual budget fall?

- Under \$250,000
- \$250,000 to \$500,000
- \$500,000 to \$1 million
- \$1 million to \$6 million
- \$6 million to \$10 million
- Over \$10 million

Appendix – Online Survey Instrument

State of Arts & Culture 1st Quarter 2009

20. What is your organization's primary discipline?

- Crafts
- Dance
- Ethnic Arts
- History
- Interdisciplinary
- Literature
- Media Arts
- Multi-disciplinary
- Music
- Nature/Science
- Opera/Musical Theatre
- Theatre
- Visual Arts

Other (please specify)

Appendix – Online Survey Instrument

State of Arts & Culture 1st Quarter 2009

21. Please enter contact information for the person completing this form so that we may contact you if we have questions regarding your survey. As a reminder, survey results will only be shared in aggregate form.

Name:

Company:

Address:

Address 2:

City/Town:

ZIP/Postal Code:

Email Address:

Phone Number: