2017 Annual Survey

Findings compiled from 82 arts and cultural organizations in the Central Puget Sound Region
INTRODUCTION

In June 2017 ArtsFund conducted a survey of its 112 Cultural Partners. We did this in an attempt to answer several important questions: What is the overall range and scope of the groups that ArtsFund serves? What are their greatest needs and challenges? What types of partnerships have they forged in the community? The answers to those questions are compiled in this report.

One of ArtsFund’s key aims in conducting this survey was to create a resource for the arts and cultural community that communicates the state of our sector, and helps us all better understand the broader landscape in which we coexist. Another goal was to collect information that enables ArtsFund to advocate on behalf of sector about the work our network is doing in the community, including partnerships with schools, community centers, the elderly, and homeless populations. A third goal was to ensure that ArtsFund’s programs and services align with the needs of the organizations that benefit from them.

We thank everyone who took the time to complete this survey, and to our entire network for your continued investment in and engagement with ArtsFund.

Scope
109 organizations were surveyed via email between June 1 and June 15, 2017. One person per organization was contacted, with the option to designate another staff person at their organization as the survey respondent if they desired. The survey contained fifteen questions, including questions on organizational composition, needs and challenges, community partnerships, and finance. This survey will be conducted and updated annually.

Participation
75% of organizations contacted completed the survey. The data presented in the pages to follow is compiled from 82 complete responses.

Notes
All data depicted in this report is based on survey responses and information shared in annual grant applications and has not been independently verified. Due to rounding of percentages to the nearest integer, some charts and graphs do not total 100%.
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NETWORK COMPOSITION

Groups by Discipline

“Other” includes pop culture, opera arts, performing arts, and heritage groups.

- Multidisciplinary: 29%
- Music: 23%
- Theatre: 17%
- Visual arts: 13%
- Other: 7%
- Dance: 6%
- Film & media: 4%
- Service: 4%
- Literary arts: 1%
NETWORK COMPOSITION

Annual Expense Budget

- $0-250K: 20%
- $250-500K: 11%
- $500K-1M: 17%
- $1M-5M: 35%
- $5M+: 18%
Staff Size

Number of full time equivalent employees. 39% of respondents reported 5 or fewer FTE. 74% of respondents reported 25 or fewer FTE.
NETWORK COMPOSITION

Board Size

Average board size of respondents: 17
Most common board size of respondents: 12
The variable most closely correlating with board size is annual expense budget.
“What are the greatest challenges facing your organization today and in the coming year?”

Of 162 distinct challenges identified in response to an open-ended question, five common themes emerged: challenges related to **funding**, **social or political issues**, **audience growth or management**, challenges with **staffing or human resources**, and challenges related to **real estate or space**. “Other” includes transportation, technology, artist housing, and licensing costs.
CHALLENGES

This was an open-ended question. Examples have been taken directly from survey responses.

Funding
Need for operating support; capital campaigns; unpredictable funding; shifts in funding priorities of funders.

“Maintaining our current level of operating support during our capital campaign.”
“Ensuring reliable ongoing support from funders, sponsors, and donors.”
“Fundraising and sustainability in a time of overall decline.”
“Decreasing support for arts and culture as donors shift towards social services.”

HR/Staffing
Hiring and growing staff; meeting cost of living for employees; leadership transitions.

“Maintaining quality staff. It is difficult to afford good people who are the key to smooth operations.”
“Seattle cost of living/minimum wage levels create challenges to offer salaries that can attract and retain experienced staff.”
“Volunteer staff burnout.”
“Getting new staff up to speed.”

Social or Political Issues
Becoming equitable, diverse, and inclusive; current political environment.

“An attack on the youth we serve by current policies.”
“Threats to NEA funding.”
“Continuing forward momentum at the staff and board level regarding our commitment to equity and inclusion practices.”
“Expanding inclusivity and diversity organization wide.”

Audience
Attracting new audiences; shifting audience tastes; lack of visibility; managing growth.

“Developing a larger, younger, more diverse audience.”
“Staying relevant to the communities that we serve.”
“Responding to the changing needs of our audiences and membership in a way that maintains our artistic integrity.”
“The need to grow capacity to meet demand.”

Real Estate
Need for bigger or better space; moving to a new space; need for renovation.

“Finding an accessible office space.”
“Successful activation of our physical space.”
“Increased need for bigger and more specialized space.”
“Put simply, we need more SPACE.”
IDENTIFIED NEEDS

“What trainings, services, and/or convenings would be useful to your organization?”

Of 101 distinct needs identified in response to an open-ended question, responses most frequently related to development, equity work, marketing, board development, opportunities for networking, or advocacy training. “Other” includes finance, strategic planning, program evaluation, and real estate.
IDENTIFIED NEEDS

This was an open-ended question. Examples have been taken directly from survey responses.

Development
Need for board fundraising training; knowledge on acquiring corporate sponsorships; information on fundraising for smaller organizations.

- “Corporate Sponsorships--how do you find the right match and make the right proposal?”
- “Board training in fundraising.”
- “How to build a more robust revenue stream as a non profit?”

Equity
Racial equity trainings for boards and staffs; trainings on how to become more diverse; improving equity and inclusion practices across the sector.

- “Diversity trainings for staff and volunteers, geared towards teaching a diverse student population.”
- “Staff trainings around equity and social justice.”
- “Creating a diverse company.”

Marketing/PR
How to reach audiences; promotion and technical marketing skills.

- “Speakers from other cities experimenting with different programming, marketing, and audience engagement models.”
- “Reaching an audience with limited resources.”
- “Marketing to new Seattleites.”

Board related
Board leadership trainings; events to help recruit new board members.

- “New board member prospect convenings.”
- “Leadership coaching, board strengthening.”
- “Board development.”

Networking
Board leadership trainings; events to help recruit new board members.

- “Opportunities to connect/mix with top-level admin staff across disciplines with similar budgets.”
- “Opportunities for networking.”

Advocacy
Arts advocacy; how to demonstrate the impact of arts and cultural work.

- “More arts advocacy locally and statewide.”
- “Addressing how we can best highlight the relevance of arts organizations in the current political climate.”
When analyzing responses by budget size, earned income percentages tended to increase with annual budget size, while foundation and public support comprised less of the largest groups total income. Across groups of all sizes, corporate support generally comprised the smallest percentage of total income. Individual giving fluctuated across group sizes without a strong pattern.
COMMUNITY PARTNERSHIPS

This survey listed ten types of community partnerships and asked respondents to check all types that their organization engages in. Groups were allowed to select more than one and write in additional categories.

95% selected at least one type of community partnership. 45% of respondents wrote in additional categories of partnership. These included NGOs, universities, libraries, parks, chambers of commerce, shopping centers, tribes, government agencies, LGBTQ+ organizations, and civil rights organizations.

<table>
<thead>
<tr>
<th>Partnership Type</th>
<th>% of Respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Schools</td>
<td>85%</td>
</tr>
<tr>
<td>Youth related</td>
<td>79%</td>
</tr>
<tr>
<td>Community centers</td>
<td>54%</td>
</tr>
<tr>
<td>Retirement/senior centers</td>
<td>45%</td>
</tr>
<tr>
<td>Homelessness services</td>
<td>22%</td>
</tr>
<tr>
<td>Environmental</td>
<td>21%</td>
</tr>
<tr>
<td>Hospitals</td>
<td>19%</td>
</tr>
<tr>
<td>Rehabilitation/healing</td>
<td>17%</td>
</tr>
<tr>
<td>Military</td>
<td>15%</td>
</tr>
<tr>
<td>Prisons</td>
<td>8%</td>
</tr>
</tbody>
</table>
CULTURAL PARTNERS

ArtsFund’s Cultural Partners are a network of ArtsFund-affiliated arts and cultural organizations in the Central Puget Sound region. Through trainings, events, and communications, the network deepens ties between organizations, provides capacity building resources, and generates exposure to new audiences and donors.

For more information visit www.artsfund.org/CulturalPartners.

2017 CULTURAL PARTNERS:

5th Avenue Theatre*
ACT Theatre*
American Asian Performing Arts Theatre*
artEAST*
Artist Trust*
Arts Corps*
ArtsWest*
Asia Pacific Cultural Center*
Auburn Symphony Orchestra
Azeotrope*
Bellevue Arts Museum*
Book-It Repertory Theatre
Broadway Center for Performing Arts*
Burke Museum*
Central District Forum for Arts & Ideas*
Chamber Music Madness*
Chinese Music and Arts Association*
Classical KING FM 98.1*
Coyote Central*
Deaf Spotlight*
Densho*
Diverse Harmony
Early Music Seattle*
Earshot Jazz*
Edmonds Center for the Arts*
Edmonds Driftwood Players
Federal Way Symphony
Festal*
Freehold Theatre*
Friends of KEXP*
Frye Art Museum*
Gage Academy of Art*
Grand Cinema*
Henry Art Gallery*
Hilltop Artists
Intiman Theatre
Jack Straw Productions*
Japan Arts Connection Lab*
Jet City Improv*

Khambatta Dance Company*
Kirkland Arts Center*
Kirkland Performance Center*
KSER*
Lakewood Playhouse
Meany Center for the Performing Arts*
Museum of Glass*
Museum of Pop Culture (MoPOP)*
Music Center of the Northwest*
Music Works Northwest*
Nordic Heritage Museum*
Northwest Film Forum*
Northwest Folklife*
Northwest Puppet Center*
Northwest Sinfonietta
Northwest African American Museum
On the Boards*
Pacific MusicWorks
Pacific Northwest Ballet*
Path with Art*
Photographic Center Northwest
Pratidhwani*
Pratt Fine Arts
Puget Sound Revels
Red Eagle Soaring*
Richard Hugo House*
Schack Art Center*
Seattle Art Museum*
Seattle Arts & Lectures*
Seattle Asian American Film Festival
Seattle Chamber Music Society*
Seattle Children’s Theatre*
Seattle Choral Company*
Seattle JazzED*
Seattle Latino Film Festival
Seattle Men’s Chorus/Seattle Women’s Chorus*
Seattle Music Partners*
Seattle Opera*
Seattle Pro Musica*
Seattle Public Theater
Seattle Repertory Jazz Orchestra*
Seattle Repertory Theatre*
Seattle Shakespeare Company*
Seattle Symphony*
Seattle Theatre Group
Seattle Youth Symphony Orchestra*
Shoreline/Lake Forest Park Arts Council
SIFF*
Snohomish County Music Project*
Spectrum Dance Theater*
Symphony Tacoma*
Tacoma Art Museum*
Tacoma Little Theatre
Tacoma Musical Playhouse*
Tacoma Opera
Tacoma Youth Symphony Association
Taproot Theatre*
Taxeerv*
Ted Brown Music Outreach*
TeenTix*
The Vera Project
The Dance School*
The Esoterics
Theater Schmeeer
Three Dollar Bill Cinema
Town Hall Association
Unexpected Productions*
Vashon Center for the Arts*
Velocity Dance Center*
Village Theatre*
Washington Ensemble Theatre (WET)*
Washington State Historical Society
Whim W’Him
Wing Luke Museum Museum of the Asian Pacific American Experience*
Youth in Focus*

* Indicates survey respondents
ABOUT ARTSFUND

ArtsFund is a Seattle-based nonprofit that strengthens the Puget Sound region by supporting the arts. Thanks to the annual support of thousands of individuals and hundreds of businesses, ArtsFund has provided grants, capacity-building programs, and services to strengthen the region’s cultural organizations for nearly 50 years. In addition, ArtsFund champions the critical role arts play in a healthy community, and is a respected voice and central advocate for the arts.

ARTSFUND’S VALUES

We Ignite Passion for the Arts.
We believe arts and culture inspire, empower, and transform individuals and communities.

We Promote Equitable and Inclusive Communities.
We believe the arts should be accessible to all and reflect, represent, and engage the entire community.

We Innovate through Collaboration and Leadership.
We believe our impact and relevance, and that of the arts sector, are deepened though continuous learning, creative leadership, and strategic partnerships.

FIND US

www.artsfund.org

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