CULTURAL PARTNERS NETWORK 2022 REPORT – Executive Summary

OVERVIEW

ArtsFund's Cultural Partners are a network of more than 130 arts and cultural organizations based in King, Pierce, and Snohomish counties. This document represents an overview of the data and learnings from the 2022 CPN Survey.

- The purpose of the survey was to understand the current composition of, and challenges experienced by Cultural Partners Network (CPN) organizations to inform ArtsFund's programming and advocacy efforts, as well as to serve as a benchmark for future surveying.
- 132 organizations were surveyed via e-newsletter and email between July 27 and August 17, 2022.
- 52% of organizations completed the survey (n=69). The previous survey efforts occurred in 2019 (or FY18) and a selection of data is used in this report as a source of comparison between pre-COVID pandemic experiences and the present.

INCOME SOURCES

Snapshot. By asking the same question about percentage of total income by earned and contributed sources in 2019, we were able to make comparisons between income sources categories between FY21 and FY18 budgets. Below are some of the most significant shifts experienced by responding organizations.

- Compared to pre-pandemic percentages, responding organizations experienced a 44% overall decrease in earned income in FY21 from FY18.
- There was a 15% decrease in individual income compared to pre-pandemic figures.
- While organizations experienced a 100% increase in contributed income from public support in FY21 compared to FY18, it did not bridge the gap left by loss of earned income. Income from public support represented 18% of the total FY21 income.

By Budget Size. To further examine income source data, we analyzed by organization budget sizes. The figures below represent either the most significant increase or decrease in percentages when comparing by budget size.

- For organizations who operate with budgets between $500K-$1M, earned income represented 42% of their FY21 budgets compared to 15% for organizations with budgets between $50K-$250K.
- Organizations with budgets between $50K-$250K indicated 32% of their FY21 budget were from public sources. For organizations with budgets over $5M, public sources accounted for 17% of their FY21 budget. This highlights the impact of government funding across the sector, but particularly for smaller budget organizations.
- For organizations >$5M, earned income decreased from 56% in FY2018 to 23% in FY2021, which represents a 59% decrease over the pandemic.

PARTNERSHIPS & COMMUNITIES SERVED

To better understand the breadth of the work responding organizations engage in, we asked about partnerships over the last year and the particular communities that they serve.

- 75% of responding organizations engaged in partnerships over the past year. 41% of the 250 unique partner organizations noted were other cultural organizations. 12% were social service-centered organizations and 9% were schools & colleges.
- 85% of respondents create or provide programming for Black, Indigenous, People of Color (BIPOC), communities.

- o   68% of respondents center BIPOC communities as part of their mission, vision, & values.
- 85% of respondents create or provide programming for youth & families.
  - o   57% of respondents center youth and families as part of their mission, vision, & values

FAQ

- Network composition: 43% of the responding organizations have between 1-5 FTE *and* 31% have budgets $1-5M.
  - o   29 of the 68 (or 42%) responding organizations have 1-5 FTE employees, but primarily have budgets <$1M. Whereas organizations with budgets between $1M-5M primarily have 11-50FTE.
- Income sources: What constitutes 'Other' sources?
  - o   This close-ended question did not have space for respondents to describe what constituted 'Other' sources, so we do not have that information.
  - o   Respondents were not told to account for their PPP loans, so if forgiven, they may have been added to the "public" funding category, or they may be accounted for in the "other" category.