

Orange County, FL
Arts Ecology Study

March 23, 2023



The logo for United Arts of Central Florida features the text "United Arts" in white, bold, sans-serif font, set against a horizontal brushstroke background that transitions from orange to red. Below this, the text "OF CENTRAL FLORIDA" is written in a smaller, black, sans-serif font.



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Arts Ecology of Orange County

- Orange County has a rich and vibrant arts ecology
- The Dr. Phillips Center is one of the leading performing arts centers in the nation, especially with the addition of Steinmetz Hall
- Important artists collaborate with the major institutions in Orange County
- But challenges remain. One large organization dominates the landscape, there is little national recognition for the region's arts organizations, there are no large organizations of color, there are a substantial number of organizations competing for limited resources, and arts management training is limited
- For a 'young' region, Orange County has established a large and vibrant arts ecology; but are the steps being taken to ensure that the arts sector grows in a sustainable way as the region grows?
- This plan evaluates the current arts ecology and suggests approaches for addressing major concerns

Process and Methodology

- 137 individuals participated in 30-minute telephone interviews or responded via online survey
- Participants included board/staff leadership of 85 organizations, county and city government officials, individual artists, supporters of the arts, and philanthropists
- Questions were both quantitative and qualitative regarding the status of individual organizations and broader observations on the arts ecology of Orange County
- Interviewees and survey respondents were informed that only aggregate information would be brought forward for the study, with all identifiers removed

137 Individuals Interviewed or Surveyed

Abdoul Rahim AbdoulKarim	Tracey Conner	Steve Goldman	Robert Kovacevich	Ashley Papagni	Bob Smedley
Heather Alexander	Chris Cortez	Roberto Gonzalez	Melanie Lajoie	Yin Peet	Keith Smith
Zac Alfson	Jim Crescitelli	Abby Goodin	Vicki Landon	Angi Perretti	Theresa Smith-Levin
Joseph Andrew	Conner Criswell	Marcia Goodwin	Keith Lay	Sheri Peterson	Jeff Stanford
Carlos Azuaje	Meredyth Davis	Peter Gordon	Jonathan Ledden	Steve Powell	Nathaniel Storey
Thamara Bejarano	Mayor Jerry Demings	Charlie Griffin	Stephanie Lerret	Gabriel Preisser	Nina Streich
Thamara Virginia Bejarano	Antonio Djermanos	Betsy Gwinn	Kimberly Lewis	Vernon Rainwater	Thali Sugisawa
Rawlvan Bennett	Janas Smith Durkee	Herb Hansen	Douglas Love-Ramos	Kathy Ramsberger	Erin Sullivan
Will Benton	Mayor Buddy Dyer	Roseann Harrington	Karla Madrigal	Clay Rivers	Stella Sung
Nelson Betancourt	Jacob Eaddy	Kerry Warren Harripersad	Beth Marshall	Chris Robb	Danielle Thomas
Melissa Braillard	Kyle Eagle	Paul Helfrich	Mär Martinez	Kenneth D Robinson	Tamla Thomas
Doug Bringle	Heide Evans	Ena Heller	David A. McElroy	Andra Rowlinson	Case Thorp
Chris Brown	Jennifer Evins	Angela Hinton	Kevin Meehan	Melissa Rudge	Sean Thurman
Pedro Brull	Scott Evans	Ha'Ani Hogan	Susan Sturm Menand	Donald Rupe	Deanna Tiedtke
Teuruhei Buchin	Susie Findell	Larissa Humiston	Tammy Millar	Donald J Salisbury	Lizette Valarino
Martha Cabral	Shannon Fitzgerald	David Hunter	Andrew Minear	Peter Schreyer	Jessi VanPelt
Michael James Cairns	Jeff Flowers	Terrance Hunter	Jeff Moore	Heather G Scott	Cristina Venturini
Chris Carr	Cindy Foley	Scott Jackson	Justin Muchoney	He Qun Shi	Michael Wainstein
Caila Carter	Charles M. Fraser	Karen Salicath Jamali	Hansen Mulford	Tiffany Shockley	PJ Waldrop
Jann Childers	Emily Freeman	Raymond Jimenez	JoAnn Newman	Brian Sikorski	James Wehr
Viviana Allison Clary	Alauna Friskics	Kathy Johnson Berlinsky	Brendan O'Connor	Kira Gondeck-Silvia	Nathan Wertheimer
Cheryl A Collins	Ronald Fulmore	Patrick Kahn	Terry Olson	Ekta Singh	Pamela Zeljak
Mindy Z. Colton	James Gillespie	Min Sun Kim	Margery Pabst-Steinmetz	Harendra Singh	

85 Organizations Interviewed or Surveyed

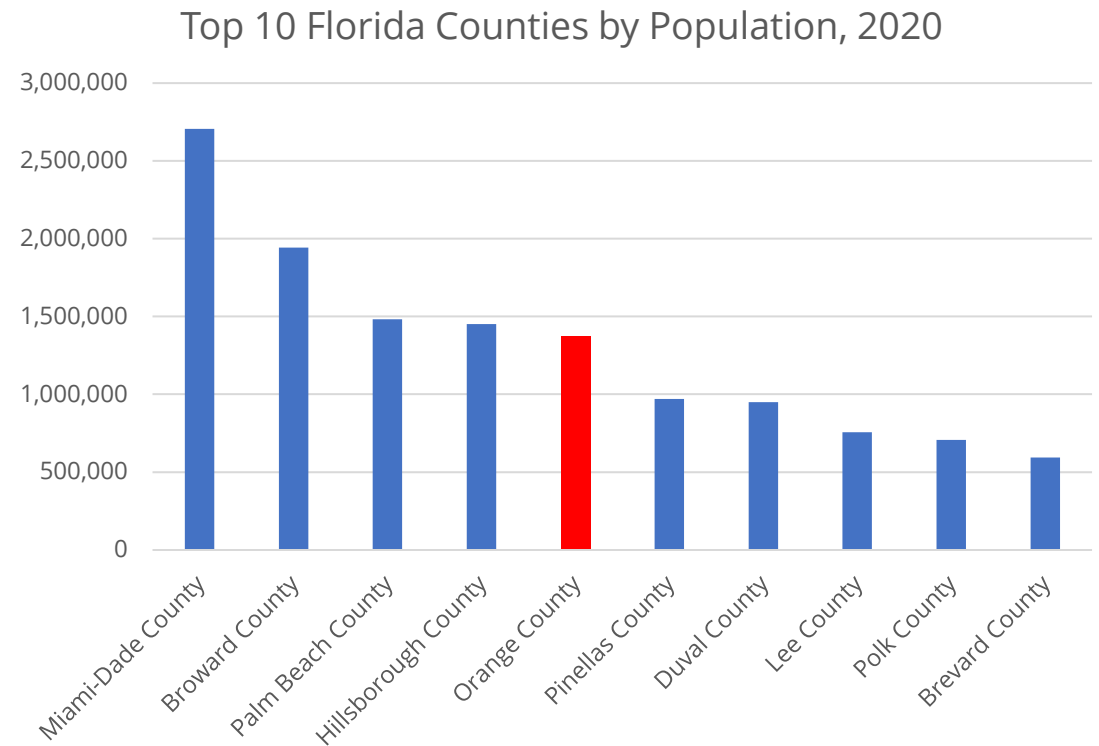
A Magi World Belly Dance	Chris Carr Fine Art Photography	FusionFest	Orange County Public Schools	Performing Arts Matter
African Artists Collective LLC	Civic Icon Arts, LLC	Handy Herby	Opera Orlando	PJ Waldrop Studios
Albin Polasek Museum	Contemporary Arts International	Indian Horizon of Florida	OptiView Entertainment	Renaissance Theatre Company
Art & History Museums of Maitland	Crealde School of Art	Kobewoodz	Orlando Ballet	Rollins Museum of Art
Asian Cultural Association	CREATE	Land of Hope, Inc.	Orlando Contemporary Chamber Orchestra	Sharadalaya
Avalon Park Arts & Culture Center	Creative City Project	Maohi Cultural Organization	Orlando Fire Department	Snap! Orlando
Awakening/art & culture	Downtown Arts District Orlando	Mayor's Office of Orange County	Orlando Flamenco	Southern Winds Theatre
Bahia Shrine Drum Corps	Dr. Phillips Center for the Performing Arts	Mayor's Office of Orlando	Orlando Fringe	Sugar City Music
Beth Marshall Presents	Edyth Bush Institute	Mennello Museum of American Art	Orlando Museum of Art	Taller de Arte Martha Cabral
Black Theatre Girl Magic	Emotions Dance	Michelee Puppets	Orlando Philharmonic Orchestra	United Arts of Central Florida
Blue Bamboo Center for the Arts	Enzian Theater	Miniature Art Society of Florida	Orlando Repertory Theatre	UCF School of Performing Arts
Bronze Kingdom Museum	Faith Arts Village of Orlando	Moschburg llc	Orlando Science Center	Viviana Allison Clary music
Bungalower Media	First Presbyterian Church of Orlando	National Young Composers Challenge	Orlando Shakes	Vivid Eye Artistic Productions
Central Florida Community Arts	Florida Artists Group	OLPE Records	Orlando Sings	Winter Garden Heritage Foundation
Central Florida Composers Forum	Florida Sculptors Guild	onePULSE Foundation	Otownfun.com	Winter Park Playhouse
Central Florida Vocal Arts	FloridaYouth Symphony Orchestra	Open Scene	Our Human Family	WUCF
Child of this Culture Foundation	Full Sail University	Orange County Library	Painters	YV Art Museum

External Analysis: Trends In The American Cultural Ecology

- COVID-19's impact on earned revenue and attendance
- Reduction in arts education
- Loss of subscription sales
- Aging of traditional donor base
- Focus on social issues
- Role of electronic distribution of cultural programming:
 - In 2017, 74% of adults got arts on the internet, 50% attended a live event
- Changing perspectives on work/life balance
- Inflation

Orange County is Growing More Quickly than the Rest of the State...

Census Year	Orange County	Florida
1980	470,865	9,746,961
1990	677,491	12,938,071
2000	896,344	15,982,824
2010	1,145,956	18,801,332
2020	1,429,908	21,538,187
<i>% change 2010-2020</i>	<i>24.8%</i>	<i>14.6%</i>



...and is Rapidly Becoming More Educated and Diverse

	2010	2020	
AGE	%	%	% Change
19 years and under	27.6%	25.0%	-2.6%
20 to 34 years	24.7%	24.5%	-0.2%
35 to 44 years	14.9%	14.3%	-0.6%
45 to 54 years	13.9%	13.1%	-0.8%
55 to 64 years	9.4%	11.2%	1.8%
65 years and older	9.5%	11.9%	2.4%
Median age	33.4	35.3	
RACE / ETHNICITY			
White	47.2%	39.2%	-8.0%
Black or African American	19.6%	19.7%	0.1%
Native	0.3%	0.2%	-0.1%
Asian	4.7%	5.2%	0.5%
Two or More Races	1.6%	2.8%	1.2%
Hispanic	25.8%	32.1%	6.3%
Other	0.8%	0.8%	0.0%
EDUCATION			
High school or less	45.0%	39.7%	-5.3%
Some college/Associate's degree	29.1%	29.8%	0.7%
Bachelor's degree/Graduate degree	25.9%	30.6%	4.7%

- The share of Orange County residents holding Bachelor's and graduate degrees has grown by nearly 5 percentage points between 2010 and 2020.
- Orange County has also gotten older and more diverse, with age groups 55 years and older gaining over 4 percentage points in total
- The county's Hispanic population grew by over 6 percentage points in the same period.

We Examined Eight Comparator Cities

- Seattle-Tacoma-Bellevue, WA Metro Area
- Cincinnati, OH-KY-IN Metro Area
- Tampa-St. Petersburg-Clearwater, FL Metro Area
- Kansas City, MO-KS Metro Area
- Austin-Round Rock-Georgetown, TX Metro Area
- Nashville-Davidson--Murfreesboro--Franklin, TN Metro Area
- Charlotte-Concord-Gastonia, NC-SC Metro Area
- Pittsburgh, PA Metro Area

Population Demographics for Comparators

	Orange County, FL [Orlando]	Orlando-Kissimmee-Sanford, FL Metro Area	Seattle-Tacoma-Bellevue, WA Metro Area	Cincinnati, OH-KY-IN Metro Area	Tampa-St. Petersburg-Clearwater, FL Metro Area	Kansas City, MO-KS Metro Area	Austin-Round Rock-Georgetown, TX Metro Area	Nashville-Davidson--Murfreesboro--Franklin, TN Metro Area	Charlotte-Concord-Gastonia, NC-SC Metro Area	Pittsburgh, PA Metro Area
Population										
Population estimate	1,422,746	2,560,260	3,928,498	2,214,265	3,152,928	2,144,129	2,173,804	1,904,186	2,595,027	2,324,447
Age and Sex										
Median age	36.6	37.4	37	38	42.2	37.5	35	36.5	37.6	43.1
0-19	25%	25%	23%	26%	22%	26%	26%	26%	27%	21%
20-39	30%	29%	31%	26%	25%	27%	32%	30%	27%	26%
40-59	27%	26%	26%	26%	26%	26%	26%	26%	27%	26%
60-79	16%	17%	17%	18%	22%	17%	14%	16%	16%	22%
80+	3%	4%	3%	4%	5%	4%	2%	3%	3%	5%
Income and Poverty										
Median household income	\$64,833	\$61,229	\$90,790	\$66,435	\$57,097	\$69,240	\$80,852	\$68,406	\$65,725	\$61,969
Per capita income	\$34,428	\$30,941	\$48,157	\$35,861	\$33,448	\$36,728	\$41,283	\$36,625	\$36,155	\$37,195
Persons in poverty, percent	15%	12.8%	8.4%	11.7%	13.0%	9.9%	10.2%	11.0%	11.1%	10.7%
Median Home Value	\$320,600	\$242,100	\$471,900	\$175,300	\$210,900	\$196,000	\$303,300	\$262,900	\$216,700	\$159,800

Greater Orlando's Top 10 Arts Organizations are Smaller and Younger Than in Comparator MSAs...

...But by 2030, the Orlando MSA's population is projected to exceed every city on this list!

MSA	Population	Low End	High End	Average	Average Age
Seattle-Tacoma-Bellevue, WA	3,928,498	\$10,595,442	\$37,276,366	\$23,037,150	63
Pittsburgh, PA	2,324,447	\$6,418,496	\$56,852,629	\$16,377,582	67
Kansas City, MO-KS	2,144,129	\$4,936,911	\$46,614,611	\$14,112,522	57
Cincinnati, OH-KY-IN	2,214,265	\$3,636,544	\$30,788,864	\$11,854,459	67
Nashville-Davidson--Murfreesboro--Franklin, TN	1,904,186	\$2,852,075	\$26,338,119	\$10,436,814	59
Austin-Round Rock-Georgetown, TX	2,173,804	\$2,522,899	\$10,455,489	\$6,060,950	51
Charlotte-Concord-Gastonia, NC-SC	2,595,027	\$1,787,815	\$13,084,303	\$5,698,346	59
Tampa-St. Petersburg-Clearwater, FL	3,175,275	\$2,249,445	\$10,539,284	\$4,905,516	44
Orlando-Kissimmee-Sanford, FL	2,560,260	\$1,517,144	\$11,996,018	\$4,676,129	44

Note: Large presenter-only organizations have been removed from this analysis

Largest Arts Organizations in Each Comparator MSA

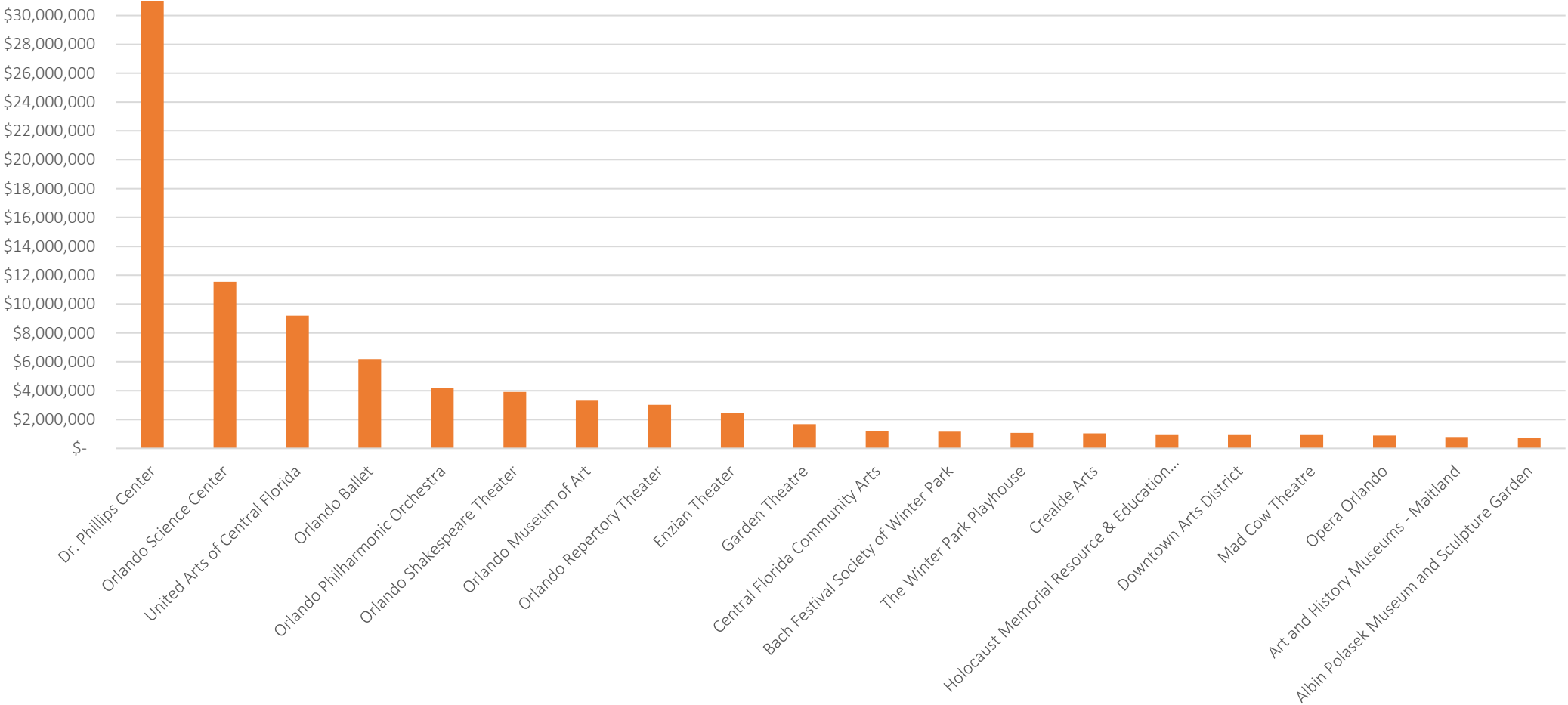
MSA	Symphony	Opera	Ballet	Theatre	Museum
Seattle-Tacoma-Bellevue, WA	\$28,858,298	\$21,947,605	\$25,196,894	\$24,040,858	\$37,276,366
Pittsburgh, PA	\$33,265,787	\$6,418,496	\$9,119,675	\$13,730,149	\$56,852,629
Kansas City, MO-KS	\$17,704,002	\$2,443,870	\$8,470,656	\$4,936,911	\$46,614,611
Cincinnati, OH-KY-IN	\$30,788,864	\$9,142,844	\$10,593,228	\$11,983,510	\$22,180,112
Nashville-Davidson--Murfreesboro--Franklin, TN	\$23,610,906	\$2,306,458	\$6,312,099	\$2,401,987	\$26,338,119
Austin-Round Rock-Georgetown, TX	\$5,162,363	\$3,445,973	\$7,776,148	\$7,539,671	\$10,455,489
Charlotte-Concord-Gastonia, NC-SC	\$9,552,217	\$2,899,974	\$7,262,299	\$4,594,672	\$13,084,303
Tampa-St. Petersburg-Clearwater, FL	\$11,229,576	<\$1,000,000*	-	\$2,189,249	\$10,539,284
Orlando-Kissimmee-Sanford, FL	\$4,244,779	\$1,283,884	\$6,463,761	\$3,938,410	\$11,996,018

**financials not publicly available. Opera Tampa is in Opera America's Budget Group 4 (\$250k-\$1mm)*

In 2030, Orange County and Orlando Will Be Compared To These MSA's

- Atlanta, GA – Current Population: 5,947,008
 - Symphony: \$34.6 million
 - Opera: \$8.6 million
 - Theatre: \$20 million
 - Ballet: \$11.6 million
 - Museum: \$19 million
- Phoenix, AZ – Current Population: 4,860,338
 - Symphony: \$13.5 million
 - Opera: \$7.2 million
 - Theatre: \$7.8 million
 - Ballet: \$7.8 million
 - Museum: \$10.9 million
- Detroit, MI – Current Population: 4,317,384
 - Symphony: \$31 million
 - Opera: \$17 million
 - Theatre: \$832k
 - Ballet: None
 - Museum: \$89.5 million

The Dr. Phillips Center is the Largest Cultural Organization in Orange County by Far

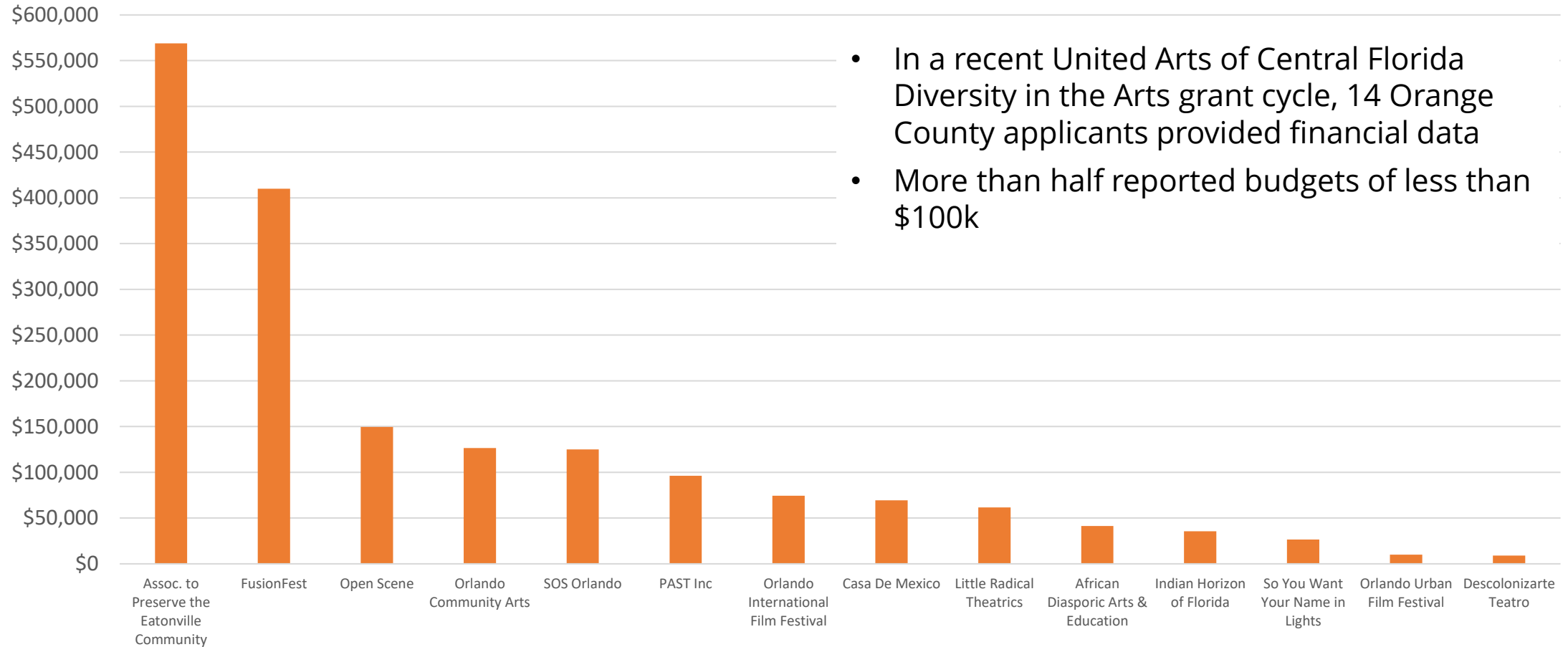


Source: IRS Form 990s, FY21

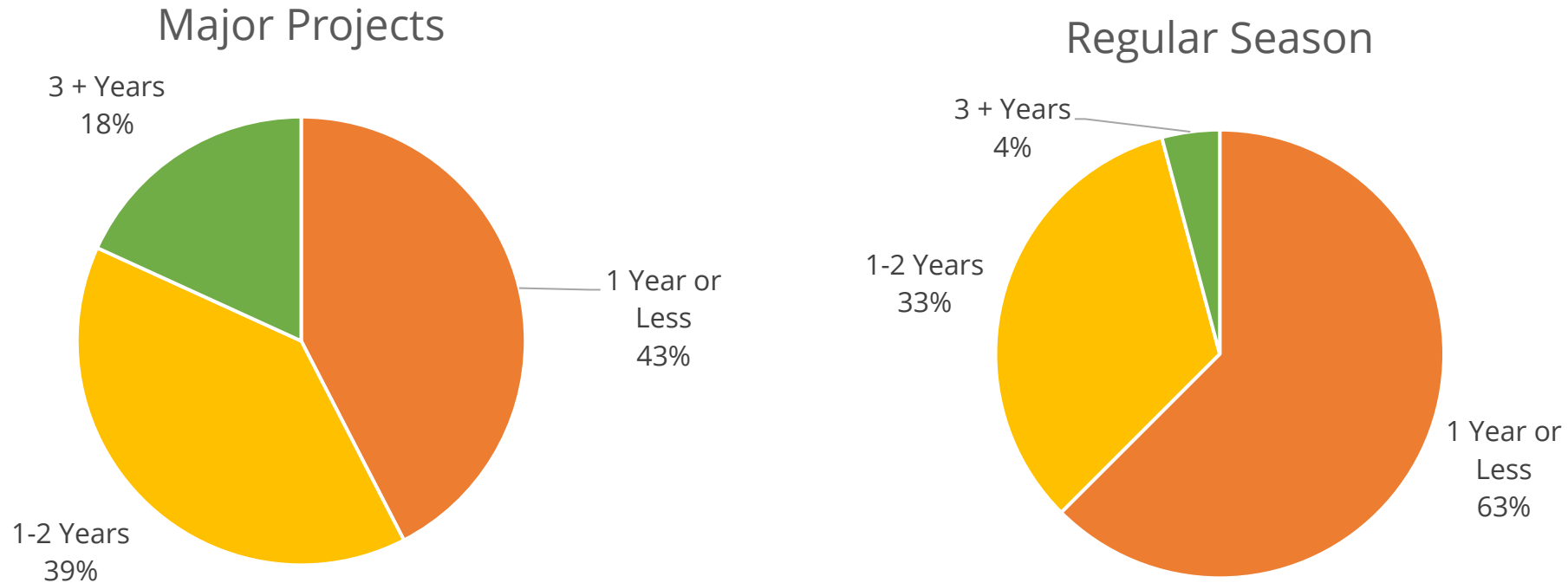
The Orlando Region is More Diverse than the Nation

	Orlando	Orange County	Orlando-Kissimmee-Sanford MSA	Florida	United States
Population	309,193	1,422,746	2,560,260	21,216,924	326,569,308
White	33%	37%	45.8%	53.4%	60.1%
Black or African American	23%	19%	15.3%	15.2%	12.2%
Native	0%	0%	0.3%	0.3%	0.8%
Asian	3%	5%	4.3%	2.7%	5.6%
Two or More Races	6%	5%	2.5%	2.2%	2.8%
Hispanic	35%	33%	31.2%	25.8%	18.2%
Other	1%	1%	0.7%	0.4%	0.3%
Education					
HS or less	33%	24%	35.7%	39.7%	38.2%
Some College/Associate's Degree	28%	30%	31.1%	29.8%	28.9%
Bachelor's Degree/Graduate Degree	39%	23%	33.2%	30.6%	32.9%
Median Household Income	\$54,167	\$64,833	\$61,229	\$57,703	\$64,944

There are Very Few Organizations Primarily Serving BIPOC Communities and They Are Small



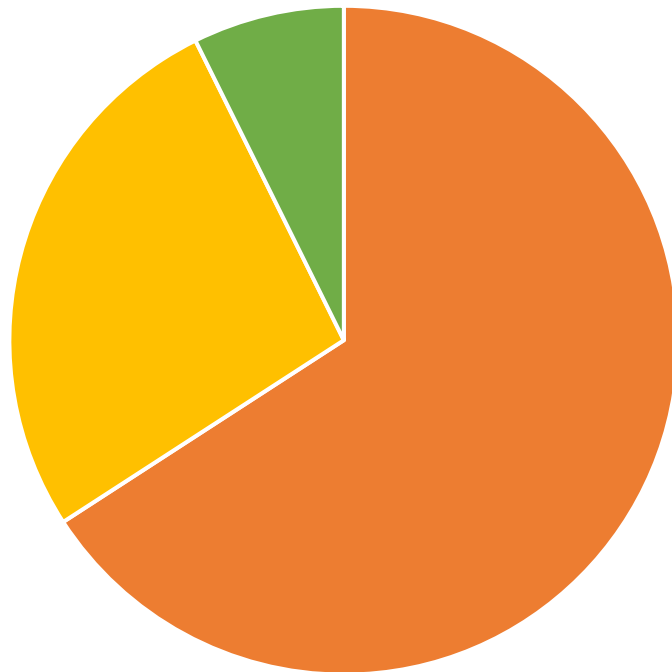
Artistic Planning



- Most organizations plan major projects 1 year or less in advance, and very few have long-range artistic plans
- Most organizations currently plan regular programming 6 months to 1 year in advance
- "This fell apart during Covid and we haven't gotten our footing back yet."
- Several organizations cited a lack of advance access to performance space as a barrier to long-term artistic planning

Partnerships are Common in Orange County

Do you partner with other organizations to develop or deliver programming? (Interviews/Surveys, n=41)



■ Often ■ Sometimes ■ Rarely/Never

- 89% of organizations reported at least occasional partnerships with other organizations
- “There is a great spirit of collaboration here. We share shop space, and work together on marketing and audience development.”
- Some expressed that there is potential for more resource sharing (e.g., overlap in educational offerings and the potential for shared administrative support)

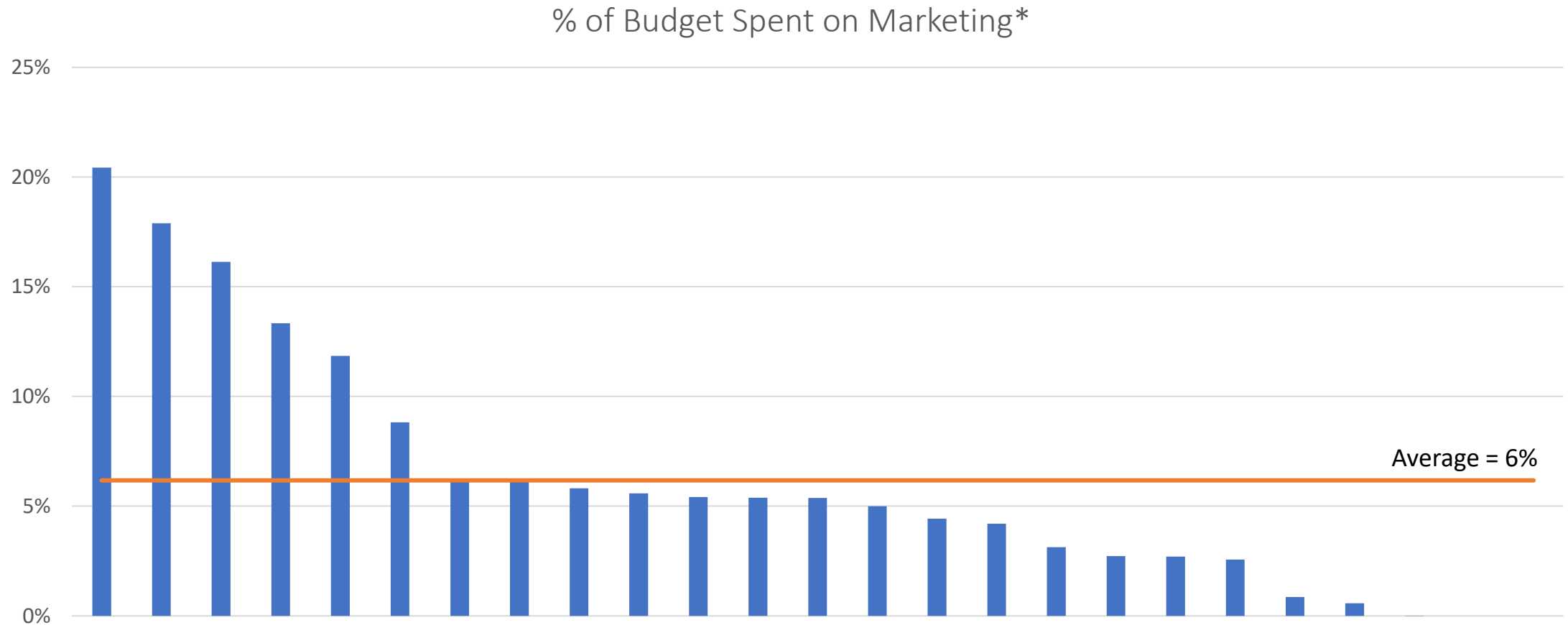
Arts Education

- 61% of those surveyed believe that students in Orange County are receiving a strong arts education
- “All schools in Orange County have arts education in the classroom and United Arts coordinates supplemental programs for all schools.”
- Interviewees praised the support for arts education at the district level
- Scott Evans, OCPS’s Senior Director for Visual and Performing Arts was recently honored by the Florida Alliance for Arts Education, with the district receiving the School Board Award
- Recently developed partnerships with the Central Florida Vocal Arts, Central Florida Community Arts, Orlando Ballet, Orlando Philharmonic Orchestra, and the Orlando Repertory Theatre will directly impact more than 75,000 students throughout the district
- United Arts supports arts education efforts in the region through Arts and Culture Access Funding and via UAArtsEd.com, an online resource connecting educators to programming for school-age children
- Despite some extraordinary public-sector efforts, the benefits of arts education in Orange County are still unevenly distributed
- “It is still hard for low-income kids and families to find a way to have access to the arts when they don't even have access to a grocery store or public transportation.”

Marketing: Topline Observations

- Organizations in Orange County must compete with theme parks, sports events and other for-profit tourist attractions for audience attention
- “We operate in a very competitive environment where there are lots of options for things to see and do. We are competing not only with other cultural venues, but also theme parks and attractions. Top of mind awareness can be difficult in such a crowded marketplace. In addition, there are barriers to entry for some audiences due to cost or lack of transportation, which we are helping to address through our accessibility programs.”
- Orange County’s diversity and expansive geography also present challenges – organizations must continue to experiment and segment their efforts wisely
- Admissions prices are generally low:
 - 30% of respondents do not charge for programming, and an additional 18% offer at least some free admission
 - Only 18% of respondents sell tickets above \$100, and all offer tickets for as low as \$29
- On average, organizations devoted 46% of their marketing budget to digital media, 23% to print, 11% to radio & television, and 20% to other sources
- Many smaller organizations expressed that they are struggling to adapt to a marketing environment dominated by digital advertising, and acknowledged insufficient funding for marketing efforts

Many Organizations Spend Modestly on Programmatic Marketing



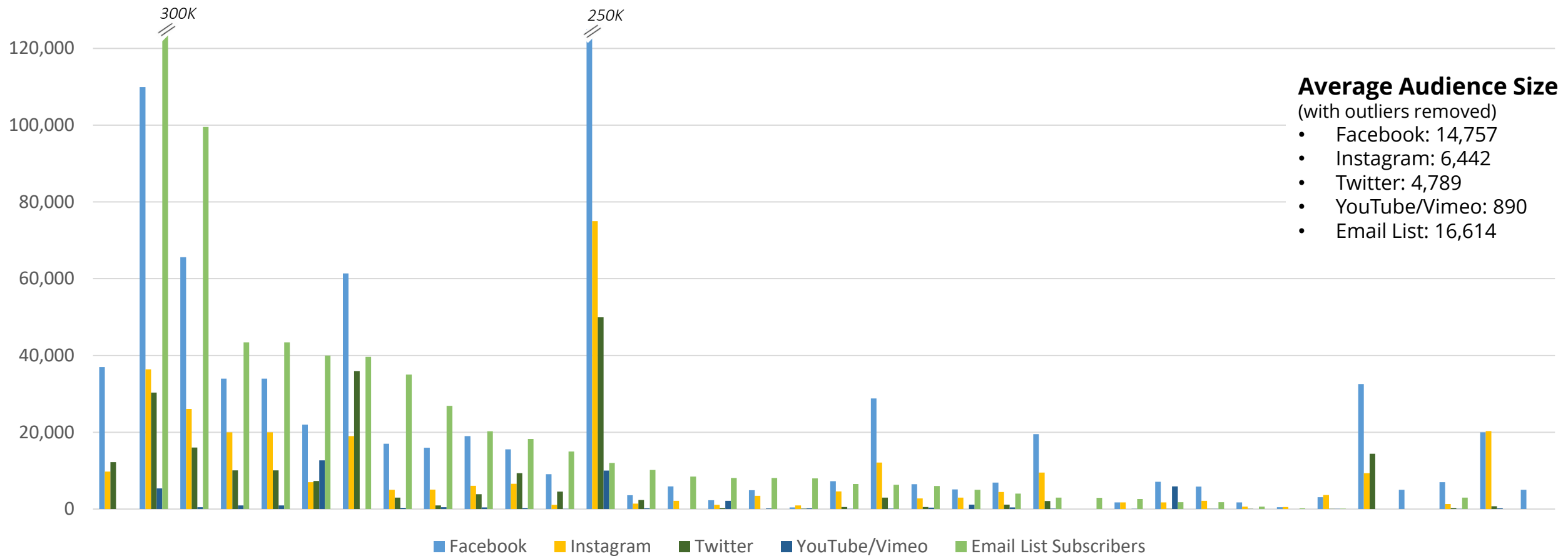
*Staff salaries excluded.

Source: Marketing Survey. N=25

Audience Profile and Preferences

- Several interviewees and survey respondents expressed a desire to diversify their audiences, and some noted success in partnering with non-arts organizations and media outlets serving culturally specific communities
- Multiple respondents described an increased focus on engagement, whether through new immersive experiences, nontraditional storytelling, or VIP enhancements to existing events
- “Health concerns have been paramount and have resulted in a significantly shortened turn time for single ticket buyers. What had traditionally been *week of* purchases have in many cases become *day of*. Regardless of lead time, however, our guests have demonstrated great interest in elevated and value-added packages without price resistance.”
- “The pandemic and social justice movements since 2020 have also influenced preferences, with a renewed interest in the diversity of artists presented and of stories told, as well as in social justice, sustainability, and telling an inclusive history.”
- The potential audience for Orange County’s cultural organizations is rapidly growing and becoming more diverse
 - 63% of Orange County’s population is nonwhite, compared with 40% nationwide
 - 22.3% of Orange County’s residents were born in another country, nearly 10% more than the national average
- A recent Americans for the Arts/Ipsos Public Affairs study found that people of color were equally likely to attend at least one arts event as their white neighbors. Are we programming for and marketing to diverse populations accordingly?

Audience Scope, “Reachable Universe”



- Most organizations have modest market penetration.
- In 2017, an estimated 73% of Floridians visited an arts or cultural entity, on par with the national average
 - This translates to 1.87M potential attendees in the Orlando-Kissimmee-Sanford MSA, excluding tourists.
- Email newsletters and Facebook are crucial for most organizations.

Institutional Marketing

- “Orlando should be known for its arts and culture in addition to theme parks and sports.”
- Institutional marketing efforts are modest, with a few exceptions
- United Arts supports the marketing efforts of cultural organizations:
 - OrlandoAtPlay.com, where Central Florida residents and visitors can learn about 3,200 annual events offered by more than 600 arts organizations
 - *Orlando Arts* magazine, a bimonthly guide to local cultural, science, and history events, offered digitally and in print. The 25-year-old publication has a distribution of more than 15,000 and 75,000 annual impressions
 - The United ArtsCard, offered to those who contribute \$100 or more to United Arts. In 2021, more than 2,000 ArtsCards were distributed, offering discounted admission for more than 25 organizations in the United Arts service area.
- The Orange County Library’s *Local Wanderer* program mirrors “culture pass” programs in other cities and somewhat duplicates the United ArtsCard effort, but only a handful of organizations currently participate
- Recent scandals in Orange County have created some mistrust within the community
- “How do we get a warning system in place to not find out about scandals in the newspaper?”

Fundraising

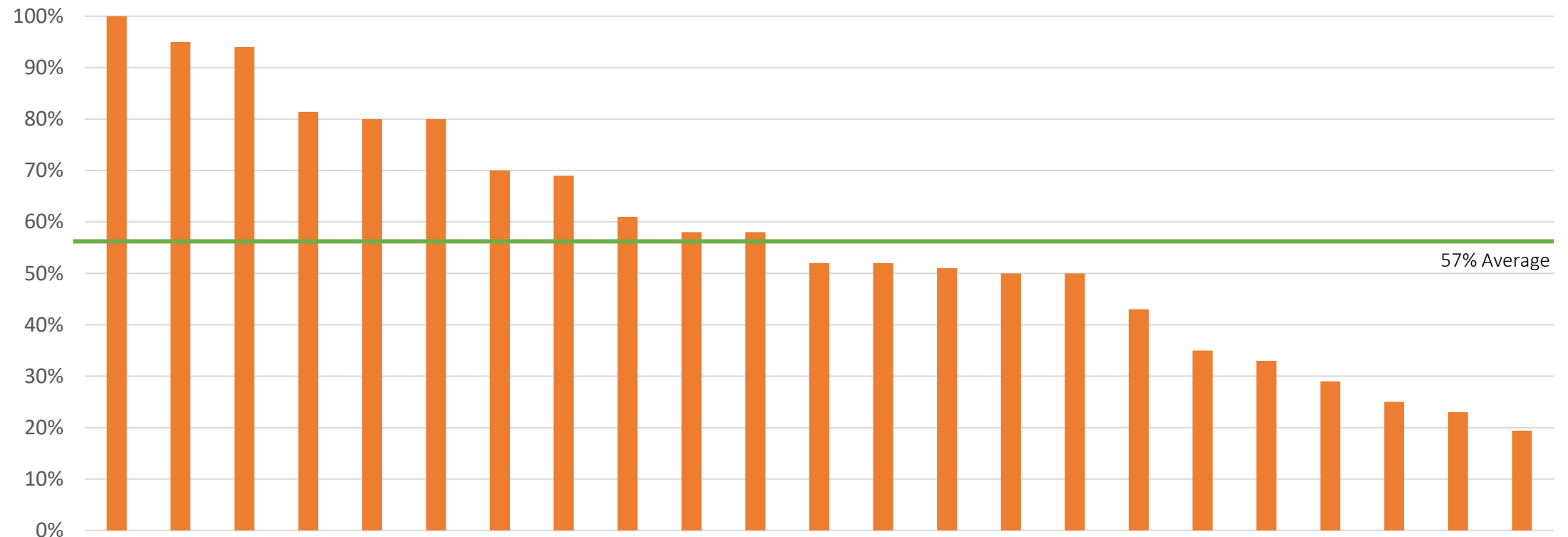
- A study of itemized charitable giving showed that Orlando metro residents gave \$900 million in 2015, an average of 3.2% of total income—on par with the average giving for the 50 largest cities in the US
- Many have commented on the lack of legacy giving compared to older US cities with more established cultures of philanthropy
- With the population of Orange County growing rapidly, arts organizations have an opportunity to grow their families
- “The community understands that they need to have the arts, but they outsource the support to United Arts.”
- “We need a strong core of funding that is more than just government. Who is going to be our base of support?”
- “I think the funding is there, it's a matter of strengthening the organizational capacity to focus on the arts. The organizations do great work, but some have trouble growing their base of support.”

Orange County Arts Organizations Are Largely Reliant on Contributed Revenue...



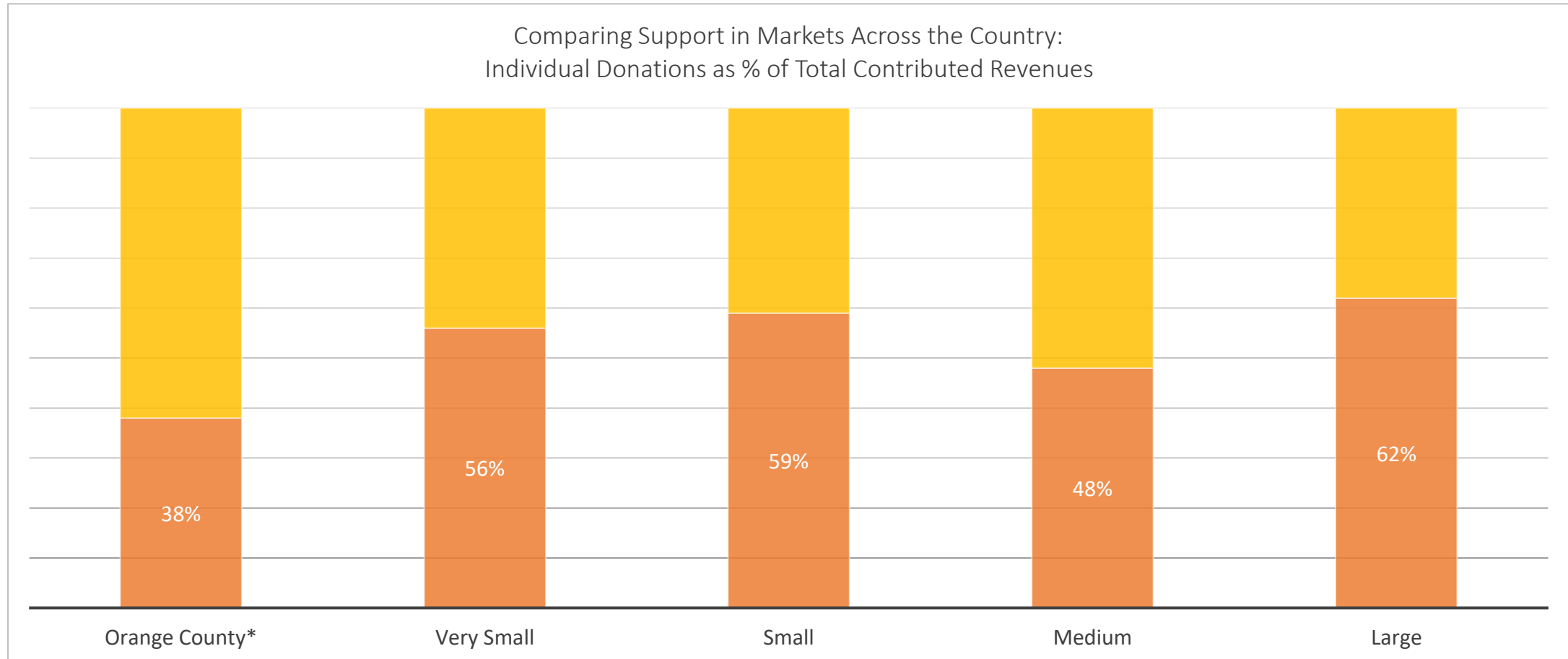
- 36% of organizations rely on over 70% contributed revenue
- 11% of organizations receive less than 30% contributed revenue
- While there is no ideal mix for all, organizations that lean heavily on either type face greater exposure.

...And Are Heavily Reliant On Their Five Largest Funders...



- 61% of the organizations surveyed rely on their five largest funders for more than 50% of their contributed revenue

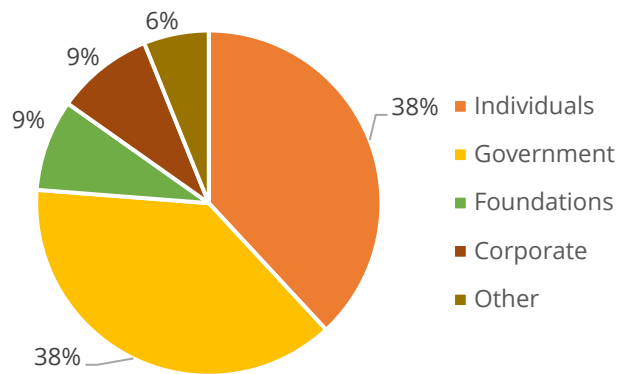
...But Orange County Organizations Receive Fewer Contributions From Individuals



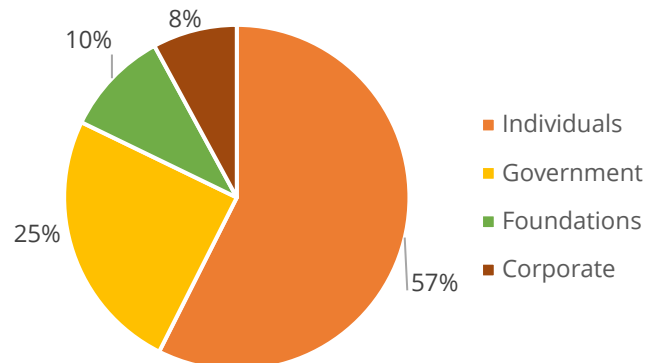
*Based on the % of contributed revenue from individuals reported by 29 sample organizations
Source: SMU National Center for Arts Research: Fundraising Report (2017)

Fundraising: Topline Observations

Arts Organizations in Orange County



National Averages



- “There has always been more interest by local philanthropists in funding buildings than in funding the content of those buildings.”
- Governmental sources tied with individuals for the largest percentage of contributed funds raised in the last FY, likely owing to extraordinary efforts in response to the pandemic (SVOG, PPP, etc)
- But several mentioned Orange County’s generous public support
- United Arts of Central Florida’s unique approach to its *Collaborative Campaign for the Arts* allows several organizations to increase their contributed revenue through additional matching funds
- When asked about individual giving trends over the past three years:
 - 48% reported an increase
 - 21% reported a decrease
 - 31% reported no change
- 69% reported that the composition of their donor family had changed either “somewhat” or “greatly” over the past 5-10 years, and 69% observed changes in donor motivations and preferences

The United Arts of Central Florida Campaign is one of the largest in the US

- United Arts of Central Florida provides support for more than 75 organizations in its service area through the *Arts for ALL Fund*
- Several organizations receive an additional 15% match on funds raised during the *Collaborative Campaign for the Arts*
- The United Arts campaign is the only United Arts Fund in the US where donors can designate their gift to specific organizations—the additional match, for those who are eligible, is directly proportional to funds raised during the campaign
- In FY22, United Arts is projected to raise \$10.9 million and grant \$10 million

City	Organization	Annual Revenue	Total Grantmaking
Cincinnati, OH	ArtsWave	\$10,069,788	\$11,221,890
Orlando, FL	United Arts of Central Florida	\$8,697,326	\$8,367,834
Charlotte, NC	Arts & Science Council of Charlotte/Mecklenburg	\$13,686,227	\$7,663,840
Milwaukee, WI	United Performing Arts Fund	\$10,367,622	\$6,915,498
Louisville, KY	Fund for the Arts	\$8,448,425	\$4,101,935
Oklahoma City, OK	Allied Arts	\$3,721,951	\$2,705,079
Memphis, TN	ArtsMemphis	\$11,884,992	\$2,520,251
Seattle, WA	ArtsFund	\$8,355,490	\$2,338,965

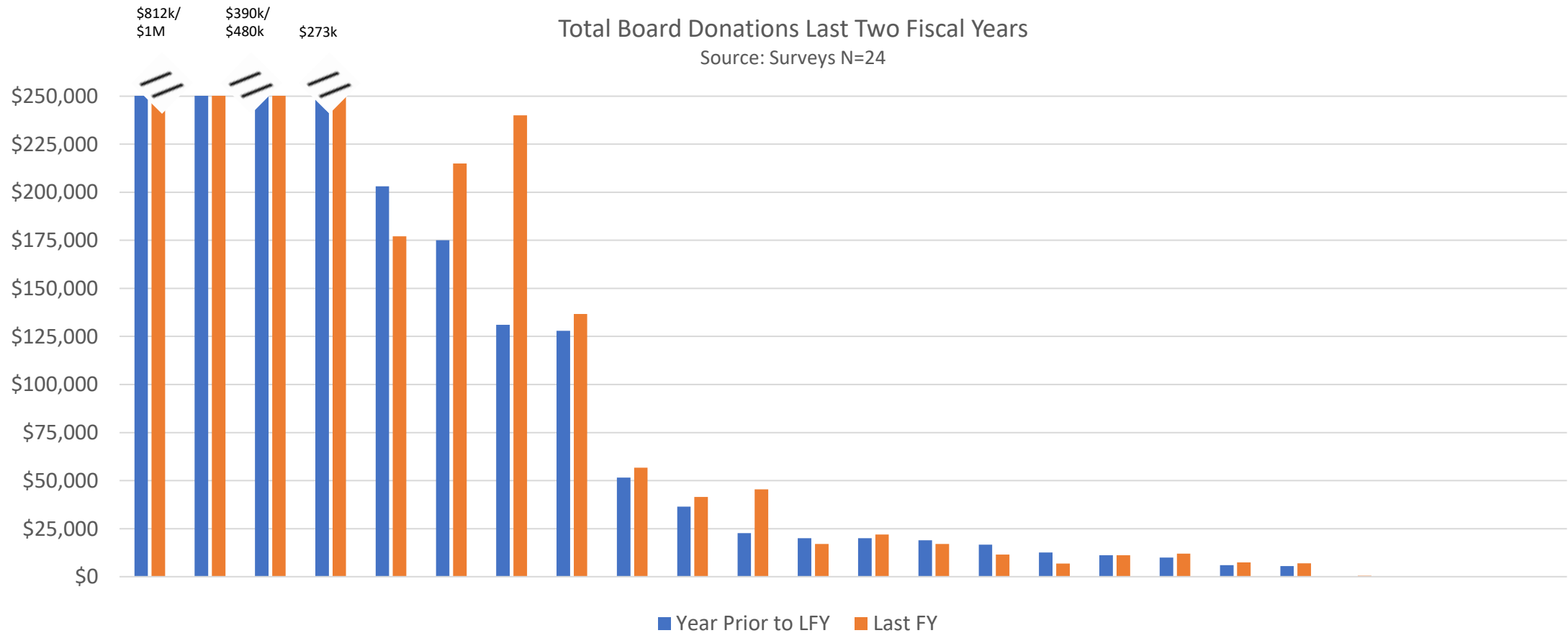
Orange County Provides Significant Funding to Arts & Cultural Organizations

- Orange County provides significant public support for the arts aimed at providing exposure to Orange County's many tourists
- The County's investment in the arts ranged from \$7.1 million to \$9.3 million over the last three FY's
- A \$500k County Venue Subsidy program aids organizations struggling to afford rent for performances
- Funds are primarily distributed through three main efforts:
 - Cultural Tourism Funding
 - Cultural Facilities Funding
 - Blockbuster Funding for marquee arts and cultural events
- The creation of an incubator to support the growth of culturally diverse organizations and initiatives is among the County's long-range goals
- "We don't want to become so dependent on government funding that we become less successful at fundraising."
- "Too many local arts organizations depend on government assistance to continue operating. Arts funding should be for special programming and growth projects, not annual operations. The local scene won't grow if it isn't forced to do so out of necessity, it'll just grow stale."

Boards: Topline Observations

- Board size ranges from 4 to 42, with an average of 17 members
- Multiple interviewees shared that they wish to diversify their boards
- United Arts has created a program to match prospective board members with organizations looking to grow and/or diversify their boards, and 34.5% of United Arts partners in FY21 reported nonwhite board leadership
- Smaller organizations expressed board recruitment challenges
 - “Most would rather get involved with the ‘prestige’ organizations rather than support the work happening in their own community.”
- 69% of respondents have a give/get requirement for board members
- When asked about board effectiveness:
 - 48% rated their board as Average
 - 33% rated their board as Strong
 - 19% rated their board as Weak
- Board giving as a % of expenses ranged from 0% to 24%, with an average of 7%
 - 11 of 23 organizations that shared board giving data fall below the desired 4-5%

Total Board Contributions – Last Two Years



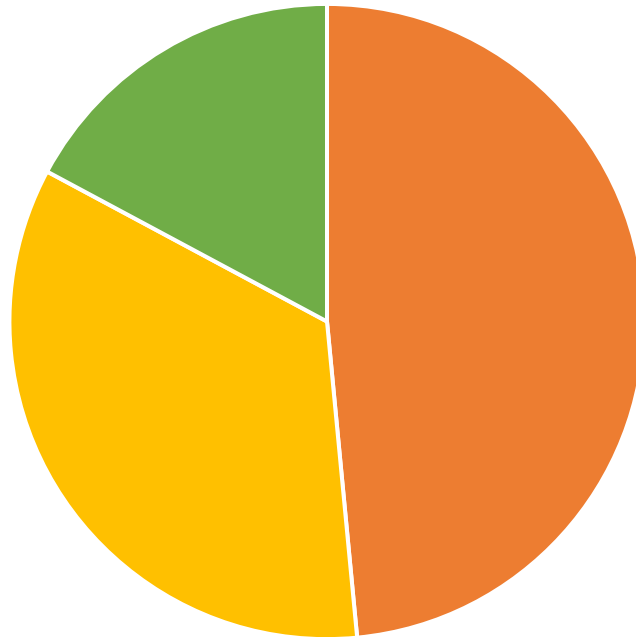
Staff: Topline Observations

- 68% of organizations interviewed or surveyed rated their staff retention as “Excellent”
- But when asked “Is there a new generation of professional arts administrators emerging in Orange County?” only 39% said yes
- “Orlando has come a long way but still has far to go, especially in the visual arts. We really need to find arts professionals to bring understanding and a professional attitude to the area. We've been run by amateurs for too long.”
- Several interviewees and survey respondents alluded to a lack of advancement opportunities within the sector, noting that local hires are often overlooked for management roles
- 20% expressed capacity challenges in marketing and another 20% cited challenges related to development staffing
- Marketing and fundraising professionals are leaving the arts to go into the for-profit sector or other areas of the non-profit sector where they can command higher wages
- Most internship programs are not paid, presenting a significant barrier to access for those from underrepresented and under-resourced communities
- “The talent is here. The investment in the talent? Not as much.”

Financial Health of Orange County Arts Organizations

Would you say your organization has strong, average or weak financial management capacity?

Source: Surveys and Interviews: N=29



Strong Average Weak

- 48% of survey respondents rated their organization's financial management capacity as Strong
- 40% of survey respondents have no unrestricted operating reserves
 - Organizations with unrestricted reserves reported a range of 10% to 95% of annual expenses, with an average of 43%
- 59% do not have an endowment
- "We have had to spend down some of our reserves to keep the organization afloat."
- "Government programs (EIDL, PPP, SVOG, ERC) were critical to our survival."

Space for Arts in Orange County

- Several individual artists noted difficulties securing affordable studio, exhibition, and performance space
- Housing affordability is also a challenge
- Orange County's geography is vast, and transportation is a challenge
- "Orange County is a huge geographic area. And has many towns. The arts are very focused in some very specific areas, like downtown Orlando. There is very little or no outreach in the outer parts of the county. Poorer areas have been totally ignored."
- The Dr. Phillips Center remains out of reach for many organizations, though public-sector initiatives have helped some organizations (e.g., the Philharmonic) afford to present their work there
- "Local support for artist co-ops, shops, and permanent artist markets would be fantastic."

Orange County Arts Ecology: Conclusions

- Rich arts ecology and diverse potential audience base
- But cultural organizations in the region are small (and young) given the size and growth of the metro area
- Dr. Phillips Center dominates the arts ecology, while organizations that produce are under-funded and under-resourced by comparison
- Organizations of color are very small
- Local and county governments provide a great deal of funding
- Contributions from individuals are low
- A modest level of national arts news generated from the region makes it difficult to build an individual donor base and to attract funds from outside of the region
- Very few organizations engage in the advanced planning that would assist in greater resource generation
- Select larger scale projects and more robust institutional marketing efforts will build the profile of individual organizations and Orange County as a cultural destination
- Orange County needs a culture of philanthropy commensurate with the aspirations and ambitions of its arts sector
- The region needs a comprehensive approach to arts management training to create the infrastructure needed to manage and govern a set of large, vibrant arts organizations.

Orange County, FL
Arts Ecology Study

Recommendations



Dick & Betsy
DeVos Family Foundation



EDYTH BUSH
CHARITABLE FOUNDATION

Flagship Institutions

- Healthy arts ecologies are anchored by robust large institutions
- Collaboration and synergy between large and small organizations is key
- Invest in partnership efforts between large and small organizations, particularly in the areas of education and outreach
- Ensure flagship organizations are well-governed
- Strategic planning and long-range artistic planning are essential
- Provide financial support for commissions, major national collaborations, and guest artists

Capacity Building and Mentoring

- Arts leaders and board members would benefit from a comprehensive capacity-building program focused on the unique challenges and opportunities facing the arts
- This program could be offered in collaboration with the Edyth Bush Institute for Philanthropy & Nonprofit Leadership
- Classes/workshops focused on artistic planning, marketing (programmatic and institutional), business planning, family-building, board development, fundraising, financial management, and strategic planning
- Mentoring of arts organizations with the staff and board able and willing to embrace more sophisticated management and governance techniques
- Advanced training in strategic planning
- Focus on growth with sustainability

Orange County as an Arts Incubator

Invest in the growth of small organizations and individual artists by providing assistance with:

- Access to rehearsal, office, exhibition and performance space at low or no cost
- Lobby for incentives for real estate developers to incorporate live/work housing for artists
- Create a United Arts “Jobs in the Arts” site advertising full-time and gig work opportunities offered by UA partners
- Subsidized shared back-office support, financial services, and technical expertise
- Provide arts management training and consultation
- Stimulate collaboration and joint ventures
- Ensure sufficient outreach and reserve resources for BIPOC and culturally specific organizations
- [Intersection for the Arts](#) in San Francisco provides a sample model for this work

Arts Incubator for BIPOC Organizations

Create a program aimed at assisting new and small BIPOC arts organizations:

- Provide grants tied to growth and development
- Offer capacity-building and business planning consulting
- Offer low-cost, subsidized office and rehearsal space
- Offer subsidized, shared back office services
- Support organizational development; provide access to consultation
- Stimulate collaboration and joint ventures
- Foster the use of new technologies to fight “digital divide”

Fund for Major Initiatives

- Create special fund to support projects of artistic significance
- Panel to evaluate whether any major projects of scope are proposed
- Ample lead time (at least 2 years in advance)
- Implementation timeline and clear evaluation plan
- Artistic/Marketing/Fundraising plan
- Project Budget
- Aim is to build recognition in Orange County and outside for artistic accomplishment
- Focus on collaborations

Arts Education

- Provide back-office program management support to smaller arts organizations looking to expand their education and outreach programming
- Ensure all arts organizations are aware of the resources available through United Arts and UAArtsEd.com
- “How do we connect the arts learning in the school building to the arts out in the community?”
- Offer arts education training to college students studying to become teachers
- The American Ballet Theatre's *Make a Ballet* program
 - Offers students the opportunity to design, choreograph, construct, produce, and perform their own original performance piece.
 - In addition to exposing students to classical dance and building future audiences, *Make a Ballet* emphasizes career opportunities in the arts, onstage and backstage, and also helps students develop valuable life skills.
- The Kennedy Center's *Any Given Child* program provides a framework for community-wide collaborative programming
- “Can artists provide mentoring for creative young people so they can see a path to a profession in the arts?”
- Increase coordination with school system to identify opportunities to enhance learning through the arts
- Provide teaching artist training to working artists from diverse backgrounds

Attracting Larger, Younger, More Diverse Audiences

- Provide grants for organizations to hire consultants to facilitate culturally sensitive and culturally specific marketing efforts
 - Include translation services to increase bilingual marketing to Orange County's growing Hispanic population
- Create a program that matches social justice organizations with arts organizations to foster cross-sector conversations and deepen community engagement work
- Ensure programmers, curators, executives, and board leaders have access to DEI training specifically tailored to the needs of arts organizations and audiences

Encouragement of Marketing Efforts

- Major funders should consider providing specific support for marketing programs that:
 - Create strong institutional images for arts organizations
 - Create high efficiency/high effectiveness programmatic marketing activities
 - Build recognition outside of the region
 - Foster collaborations between arts institutions to lower the cost of marketing while increasing reach
- Offer a series of expert-led training sessions on digital marketing for the arts
- Encourage resource-sharing and marketing trades (list sharing, co-promotion, etc)
- Facilitate memberships for arts organizations in trade associations that serve the business, tourism, and hospitality industries
- Establish greater synergy between the United ArtsCard and *Local Wanderer* program, establishing a true “culture pass” model for Orange County

Building National Awareness for the Arts in Orange County

- Promote arts & culture, along with sports and theme parks, as a reason to play, work, and stay in Orange County
- Ensure strong institutional marketing support for major organizations
- Highlight joint programming efforts
- Continue to invest in IMMERSE and FusionFest and ensure arts organizations of all sizes are able to participate
- Support the export of work created in Orange County (e.g., touring productions and exhibitions)
- Facilitate collaboration with Visit Orlando and other tourism promoters

Building A Culture of Philanthropy: Individuals

- Fund capacity-building efforts for organizations committed to establishing healthy individual giving programs
- Offer restricted funding for organizations to add/improve CRM's, including staff training
- Encourage foundations to offer match programs that incentivize new donor acquisition
- Create a Young Professionals Council for the Arts to capture the attention of Orange County's emerging professionals and prepare them for board service
- Increase investment in *United Arts Collaborative Campaign for the Arts* to encourage greater participation by individuals

Building A Culture of Philanthropy: Corporate

- Facilitate arts leadership participation in Chamber of Commerce and other groups representing the business community in Orange County
- Provide “matchmaking” and funding to add arts components to major corporate meetings and conferences (lunchtime performances, dinner and a show, etc)
- Recognize and celebrate business leader involvement with the arts and arts philanthropy
- Encourage corporate executives to join arts boards

Space

- Identify underused and/or vacant community spaces that could be activated for arts use
- Increase collaboration between arts organizations and parks & recreation departments at the county and city levels
- An arts-oriented program like DC's *Grow Golden* could match artists and arts organizations with vacant space and enliven commercial districts as they continue to recover from pandemic closures
 - <https://goldentriangledc.com/locate-here/grow-golden/>
- Negotiate priority access to space and extended booking windows with major venues, including the Dr. Phillips Center, to allow organizations to develop longer-term artistic plans and line up partners for larger-scale projects