AMS
PLANNING & RESEARCH
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Entertainment
Industries

Columbus Arts Market Sustainability Analysis

Prepared for The Columbus Foundation

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Table of Contents

Executive Summary 2
Introduction 9
Situation Analysis 10
Benchmarking and Best Practices 20
Best Practices 29
Opportunities for increased efficiency 34
Opportunities to collaborate 36
Community Capacity 39
The "Right" Size: Observations and Conclusions 44
Appendix A – Sustainability Analysis Indicators / Indices 52
Appendix B – Research Digest: National Context and Trends 65
Appendix C – Arts and Cultural Organizations by Core Based Statistical Areas (Budgets Greater Than $500,000) 69
Appendix D – Complete List of Indicators 90
Appendix E – Notes on Dedicated Tax Revenue Streams 91
Appendix F – Major Cultural Institutions by Market Size 94

Executive Summary

In March 2010, the Columbus Foundation retained AMS Planning & Research to conduct a sustainability analysis of the Columbus arts sector. The goal of this analysis was to explore two questions:

1. Is the breadth and depth of the cultural ecosystem in Columbus appropriate for a community of its size, composition and access to resources?
2. Are individual organizations within the region's cultural ecosystem able to sustain themselves given the size, composition and resources of the market that is available to support them?

Situation Analysis

Building on work by WolfBrown in their January 2010 report on the Future of the Arts in Columbus, Ohio, we began our work by extending their trend analysis over a 10 year period to document changes in the Columbus arts sector over two economic cycles. Among key observations:

- There has been an aggregate loss of earned revenue in the sector, with a decline of 27.3%. ($4.8 million)
- Contributed revenue has increased, with individual giving having increased by 124.4%.
- Corporate contributions increased by only $285,000 (5.0%)
- Public sector support from all levels of government gained just $850,000 (23.3%)
- While some organizations contracted considerably over the past decade, there are a number of organizations that have successfully grown or emerged.
- The largest organizations, in aggregate, have had no material gains in buying power over the past decade despite increased budgets.
- There has been increased competition in the local entertainment sector with a substantial number of new venues and organizations having opened in the past decade.

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Understanding Change

Nationally, the arts and culture sector has experienced change that mirrors some of the trends in Columbus, including:

- A decline in participation of benchmark arts activities (classical music, opera, ballet, dramatic plays) by as much as 30% since 1982.
- Arts philanthropy ranking in 7th place of ten charitable organization categories for the past decade.
- Non-profit theatre companies experiencing stagnant buying power over the past decade.

Locally, Columbus has not changed much demographically over the past ten years though there are some economic indicators which are of concern. In particular, Columbus has seen less net growth in the number of business firms and fewer new small business establishment which correlates with slower growing economies. In addition, Columbus's GDP has grown at a slower rate than the average of all U.S. metropolitan areas. While these areas are of concern, *Columbus 2020!*, a regional economic development plan, outlines an aggressive plan to build the local economy, centered around three key strategies:

1. Retain and expand the companies and industries that call Central Ohio home today
2. Attract major employers to establish operations in Central Ohio
3. Create more commercial enterprises by leveraging our tremendous research assets and entrepreneurs

There is a strong consensus among community leaders that Columbus's arts sector can and should play an important role in achieving these goals by:

A. Contributing to Columbus' competitiveness by helping to tell the Columbus story
B. Aligning with broad community goals
C. Pursuing partnerships with business, government, education, sports, tourism and entertainment
D. Achieving further efficiency and right-sizing by promoting strong management practices…that align with community capacity and demand[1]"

[1] Culbert, Jane and Thomas Wolf. "Final Report on the future of the arts in Columbus, Ohio Financial Analysis for the Columbus Arts Sector." WolfBrown. November 2009. p. 14-15.

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Benchmarking

One of the key outputs of our analysis is to test whether Columbus's arts sector is right-sized and sustainable. Central to this consideration is exploring what a robust and reliable sector looks like, including the capitalization necessary to succeed. As we pursued the notion of sustainability, we needed to better define measures or indicators of "right-sized" through field research and stakeholder conversations. It quickly became apparent to us that sustainability is a place on a continuum of operating outcomes. There are distinct levels; each reflecting different degrees of organizational health, capacity and required capitalization – whether in an individual organization or the arts sector as a whole. The three levels we have defined for this project are:

- "Viable" – the capability to function in the short-term, but limited in the capacity to adapt and grow
- "Sustainable" – the ability to meet present needs, but also to generate enough resources to deliver on mission in changing environment
- "Vital" – access to sufficient resources to allow the organization to fulfill its mission, reinvest in its future, and maximize its public value by evolving to meet future needs[2]

With these definitions in mind, we developed an index system with 14 indicators spread among these five categories:

1. Attendance and Market
2. Contributed Income
3. Human Capital
4. Assets
5. Product

[2] Adapted, in part, from the United Nations World Commission on Environment and Development. 1987. p. 24, Section 27.

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We then documented the arts sector in comparable communities based on the Columbus Partnership's benchmarking study, and developed the following composite scores and sustainability levels, placing Columbus in the bottom half of the analysis group.

City	Composite Index Score	Sustainability Level
Minneapolis	2358	Vital
Indianapolis	2125	Vital
Cleveland	1952	Vital
Kansas City	1430	Sustainable
Cincinnati	1344	Sustainable
San Diego	1209	Viable
Raleigh	1138	Viable
Charlotte	1119	Viable
Columbus	1100	Viable
Louisville	1014	Viable
Austin	977	Viable
Portland	958	Viable
Milwaukee	924	Viable
Nashville	924	Viable
Jacksonville	899	Viable

In order to develop recommendations, we focused on the three "vital" communities of Minneapolis, Indianapolis and Cleveland to understand what initiatives might be successful. In our research, we found the following themes:

- Sustained philanthropic leadership, especially from institutional donors
- Dedicated tax revenue streams; often both on the local and state level
- There has been a successful alignment of goals and messaging with broader civic objectives
- Collaborative arrangements to increase awareness and sales, such as centralized event calendars and cultural district collaborations
- The sector has permitted contraction, i.e., some arts organizations have closed their doors

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Needs and Opportunities

Columbus arts organizations already partner and collaborate with each other considerably, with the recent consolidation of the Columbus Symphony Orchestra's operations with CAPA being the most recent example. That said, we did survey organizations to test key issues and understand opportunities for further growth. Our surveys revealed the following key points:

- Large organizations were more likely than small organizations to feel that they could not maintain programming and service levels under current economic conditions
- Interestingly, most organizations felt that their audiences had been maintained for had grown contrary to the dramatic decline in aggregate earned revenue data
- There is general satisfaction with the collaboration and partnerships that already exist
- Areas of interest for additional opportunity include market research, collaborating on broad messaging for fundraising, increased advocacy efforts, and engaging underserved audiences

Capacity

In order to test community capacity, we compared a number of demographic and psychographic indices between Columbus and its comparables. We observed that, with the exception of Minneapolis which ranked much higher, these indices were quite similar between Columbus and the vital and sustainable communities, suggesting that there is latent market demand.

In addition, we compared some key demographic figures between Columbus and other communities. Just as with the psychographics, there is a great deal of similarity between Columbus and the vital and sustainable communities, further reinforcing that there is meaningful market potential.

In interviews with 35 cultural leaders and community stakeholders, we tested the importance and likelihood of various ways to better capitalize the sector. There was consensus that private sector support needed to be increased, with a focus on restoring corporate philanthropy and that new donors (both individuals and corporate) needed to be cultivated. In addition, there was a great deal of interest in creating a new local tax revenue stream, with a consensus that a seat admissions tax might be the most feasible.

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One of the key challenges facing the Columbus arts sector is the amount of donor fatigue within the community. However, there is evidence that a well planned and well executed campaign can gain philanthropic support. In particular, donors would like to see a return on investment in four areas:

1. Demonstrated contributions to the quality of life in Columbus
2. Attracting business and retaining talent
3. Attracting positive attention and goodwill for the city
4. Attracting visitors to Columbus

The "Right" Size

While the Columbus arts sector seems viable as a whole, it is clearly not sustainable given the current level of resources dedicated to the sector.

The investment in the sector by consumers, donors and the public sector does not achieve the levels illustrated in the sustainable benchmark communities.

Our indicators show that while Columbus may be able to maintain current activity levels, the sector will face increasing difficulty adapting and investing in future growth. While many of the challenges that face the Columbus arts sector mirror national challenges; other communities have found effective strategies to generate resources.

The Columbus arts sector suffers from a decade of under-investment, and simultaneous focus on building sales, public support, private philanthropy, and adequate endowments will be critical for the sector to move from a viable one to a sustainable one.

In particular, we recommend several strategies to "move the needle" and appropriately capitalize the arts sector:

1. Invest in market research
2. Advocate for both local and state-wide dedicated tax revenue
3. Communicate the alignment between the arts sectors' goals and the larger goals for Central Ohio
4. Drive increased private sector support by improving and coordinating fundraising messaging

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5. Build an endowment infrastructure

AMS recommends the following specific targets (before inflation) over a ten year time horizon:

- An annual increase of 4% for aggregate sales per capita to generate over $15 million in additional revenues
- A public sector funding goal for the entire sector of $20 million requires a 5.6% annual increase in support
- An increase of 6/10s of one-percent in the private sector would generate an additional $4 million putting the community on par with benchmark cities
- A longer-term goal of achieving a $50 – 65 million endowment should be established

Afterword

The Columbus arts sector is comprised of many different and varied organizations. Some have a long history in the community, some are more recent and others are emerging to meet new demands. Throughout our research, in Columbus and beyond, it is clear that entitlements and givens are no longer the order of the day for the arts and culture sector. If the Columbus market is unable to support a specific organization either through sales or philanthropy, the community has to make a deliberate decision whether the organization is still viable and relevant to Columbus. There are certainly examples of other communities that have confronted these difficult questions. That does not mean that a particular city is culturally deficient. Instead, its arts and culture sector evolves in a way that becomes representative of its community and becomes distinct from others.

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Introduction

In March 2010, the Columbus Foundation retained AMS Planning & Research to conduct a sustainability analysis of the Columbus arts sector. The goal of this analysis was to explore two questions:

1. Is the breadth and depth of the cultural ecosystem in Columbus appropriate for a community of its size, composition and access to resources?
2. Are individual organizations within the region's cultural ecosystem able to sustain themselves given the size, composition and resources of the market that is available to support them?

It is important to emphasize that our approach to exploring these questions is based on gaining a broad understanding of institutional, financial and market sustainability and is not intended to address questions around quality or the ability of Columbus to sustain a particular standard of excellence at any one organization or for the sector as a whole. Instead, our approach was to build on the previous studies of the sector, develop a model that can measure the viability of the sector as a whole, and identify both opportunities for growth as well as areas of redundancy.

In order to conduct this analysis, AMs undertook several tasks, including:

- A review of the major studies conducted on Columbus and its arts sector over the past five years
- An analysis of studies and trends in the arts sector
- Surveys of Columbus arts organizations
- Interviews with over 35 stakeholders throughout Columbus and Franklin County

The information gathered from these inputs informed a comprehensive data collection effort geared towards developing and executing the sustainability analysis.

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Situation Analysis

Changes in the Columbus Cultural Sector

Previous reports have quantified the contraction of Columbus's arts and culture sector over the past five years. Overall, aggregate revenue decreased by 11%, adjusting for inflation, from FY2005 to FY2009.[3] Aggregate expenses decreased by 14% in the same time period.[4]

Our interviews with Columbus cultural leaders provided insight into the changes made to their organizations, which included layoffs, staff furloughs, benefit reductions, and wage decreases as well as reduced programming. Many organizations that had cash reserves have depleted them.

10-Year Revenue Analysis - All Operating Support Grantees					
Revenue Type	1999* (n=14)	2009 (n=20)	Change in $	Change in %	Average annual rate of change
Aggregate Earned Revenue	$34,458,961	$35,546,438	$1,087,477	3.2%	0.3%
Aggregate Ticket & Membership Revenue	$17,512,177	$12,731,817	($4,780,360)	-27.3%	-2.9%
Aggregate Contributed Revenue	$25,350,552	$40,079,905	$14,729,353	58.1%	4.3%
Aggregate Sponsorships	$669,698	$1,863,912	$1,194,214	178.3%	9.8%
Aggregate Corporate Contributions	$5,654,300	$5,938,047	$283,747	5.0%	0.4%
Aggregate Foundation Contributions	$1,684,602	$3,743,679	$2,059,077	122.2%	7.5%
Aggregate Individual & Board Contributions	$5,760,503	$12,925,748	$7,165,245	124.4%	7.6%
Aggregate Government Contributions	$3,641,515	$4,488,820	$847,305	23.3%	1.9%

*1999 is adjusted for inflation

Figure 1: 10 Year Revenue Analysis - All 2009 Operating Support Recipients

The recently completed Report on the Future of the Arts in the Columbus, prepared by WolfBrown, indicated that in aggregate, the 36 organizations they surveyed reported a 1% decrease in revenues in the period between FY 2005 and FY 2009 (from $75.1 million to $74.2 million), which represents a decrease of 11% if FY 2009 revenues are put into FY 2005 dollars. Organizations also reported a 5% decrease in expenditures in the period between FY 2005 and FY 2009 (from $76.1 million to $72.3 million), which represents a decrease of 14% if FY 2009 expenditures are put into FY 2005 dollars[5].

After speaking with cultural leaders, we tested if those trends that might predate the recession, indicating a systemic threat to the vitality of Columbus arts organizations. Using data provided by GCAC, we analyzed 10-years of revenue data (which included data from 14 organizations in 1999 and 20

[3] Culbert, Jane and Thomas Wolf. "Financial Analysis for the Columbus Arts Sector." WolfBrown. November 2009. p. 1.
[4] Ibid. p. 2.

[5] Ibid, p. ii - iii

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organizations in 2009) by various subcategories, which are illustrated in figure 1.

Gains in contributed revenue

With six additional organizations added to the roster of those receiving operating support grants from GCAC during the past decade, the breadth of the core arts sector in Columbus has grown. An organization by organization comparison shows that most organizations have increased their total contributed revenue while the Columbus Symphony Orchestra and Opera Columbus have lost considerable financial support (Figure 2). Nearly all contributed revenue categories have increased even when adjusted for inflation. Of the fourteen organizations receiving operating support from GCAC in 1999, 85% have seen an increase in total operating contributions during a time when financial support increased from $25.3 million to $41.6 million.

Over the ten-year period, public sector support has also increased in aggregate for the Columbus arts sector, but some key organizations have lost government funding. Figure 3, on the following page, illustrates the changes by organization.

	Total Contributed			
	1999	2009	Change in %	Change in %
Actors Theatre	$128,079	$134,792	$6,713	5.2%
BalletMet	$2,394,424	$2,089,468	($304,956)	-12.7%
CAPA	$1,155,200	$1,637,471	$482,271	41.7%
CATCO	$884,988	$747,853	($137,135)	-15.5%
Chamber Music Columbus	$0	$115,681	$115,681	N/A
CityMusic	$0	$100,410	$100,410	N/A
Columbus Children's Theatre	$155,427	$449,274	$293,847	189.1%
Columbus Museum of Art	$6,889,955	$7,965,947	$1,075,993	15.6%
Columbus Symphony Orchestra	$6,802,827	$4,173,431	($2,629,396)	-38.7%
COSI	$2,032,862	$5,842,291	$3,809,429	187.4%
Friends of Early Music	$27,743	$48,949	$21,206	76.4%
Jazz Arts Group	$599,504	$1,443,479	$843,975	140.8%
King Arts Complex	$1,197,152	$2,425,576	$1,228,424	102.6%
MadLab	$0	$52,081	$52,081	N/A
Ohio Art League	$0	$37,360	$37,360	N/A
Ohio Designer Craftsmen	$0	$206,597	$206,597	N/A
Opera Columbus	$2,165,528	$596,283	($1,569,245)	-72.5%
ProMusica Chamber Orchestra	$536,377	$887,354	$350,977	65.4%
Thurber House	$380,487	$505,044	$124,557	32.7%
Wexner Center for the Arts	$0	$12,175,433	$12,175,433	N/A
Total	$25,350,552	$41,634,774	$16,284,222	
Average	$1,267,528	$2,081,739	$814,211	

Figure 2: Comparison of Contributed Revenue

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	Total Government Support			
	1999	2009	Change in %	Change in %
Actors Theatre	$14,771	$ 27,737	$12,967	87.8%
BalletMet	$343,032	$ 416,210	$73,178	21.3%
CAPA	$497,879	$ 528,762	$30,883	6.2%
CATCO	$222,320	$ 148,524	($73,796)	-33.2%
Chamber Music Columbus	$0	$ 31,314	$31,314	N/A
CityMusic	$0	$ 25,769	$25,769	N/A
Columbus Children's Theatre	$24,117	$ 150,759	$126,642	525.1%
Columbus Museum of Art	$542,179	$ 409,607	($132,572)	-24.5%
Columbus Symphony Orchestra	$492,314	$ 404,405	($87,909)	-17.9%
COSI	$290,672	$ 1,102,515	$811,843	279.3%
Friends of Early Music	$8,484	$ 22,513	$14,029	165.3%
Jazz Arts Group	$178,117	$ 308,979	$130,862	73.5%
King Arts Complex	$373,668	$ 239,619	($134,049)	-35.9%
MadLab	$0	$ 18,617	$18,617	N/A
Ohio Art League	$0	$ 22,945	$22,945	N/A
Ohio Designer Craftsmen	$0	$ 115,505	$115,505	N/A
Opera Columbus	$452,894	$ 187,049	($265,845)	-58.7%
ProMusica Chamber Orchestra	$80,713	$ 74,064	($6,649)	-8.2%
Thurber House	$120,356	$ 122,265	$1,909	1.6%
Wexner Center for the Arts	$0	$ 131,662	$131,662	N/A
Total	$3,641,515	$4,488,820	$847,305	
Average	$182,076	$224,441	$42,365	

Figure 3: Government Support

In our interviews with cultural leaders, corporate support was characterized, by most, as lower than it had been in the past. Analysis by organization documents this change with 11 organizations seeing a decline in overall corporate support from 1999 – 2009, while only 3 organizations have seen an increase(Figure 3). Figure 4 illustrates that the corporate philanthropy component of business sector support has shifted with 11 organizations gaining and 6 losing support, while in aggregate, total support has remained level since 1999.

	Total Corporate Philanthropy (excluding sponsorships)			
	1999	2009	Change in %	Change in %
Actors Theatre	$7,869	$ -	($7,869)	-100.0%
BalletMet	$756,790	$ 446,001	($310,789)	-41.1%
CAPA	$258,544	$ 203,184	($55,360)	-21.4%
CATCO	$130,334	$ 170,475	$40,141	30.8%
Chamber Music Columbus		$ 4,015	$4,015	N/A
CityMusic		$ 800	$800	N/A
Columbus Children's Theatre	$34,004	$ 116,286	$82,282	242.0%
Columbus Museum of Art	$1,880,850	$ 437,434	($1,443,416)	-76.7%
Columbus Symphony Orchestra	$1,696,709	$ 1,099,245	($597,464)	-35.2%
COSI	$0	$ 373,556	$373,556	N/A
Friends of Early Music	$323	$ 500	$178	55.0%
Jazz Arts Group	$55,464	$ 244,246	$188,782	340.4%
King Arts Complex	$231,872	$ 406,142	$174,270	75.2%
MadLab		$ -	$0	N/A
Ohio Art League		$ -	$0	N/A
Ohio Designer Craftsmen		$ 2,025	$2,025	N/A
Opera Columbus	$541,614	$ 199,306	($342,308)	-63.2%
ProMusica Chamber Orchestra	$59,927	$ 143,340	$83,413	139.2%
Thurber House	$0	$ 108,032	$108,032	N/A
Wexner Center for the Arts		$ 1,983,460	$1,983,460	N/A
Total	$5,654,300	$5,938,047	$283,747	
Average	$403,879	$296,902	$14,187	

Figure 4: Corporate Philanthropy

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While philanthropy has increased modestly, gains in corporate sponsorships (Figure 5) are the result of one organization making substantial gains; otherwise, aggregate corporate sponsorship has declined by 57.1%, since 1999.

	Total Corporate Sponsorships			
	1999	2009	Change in %	Change in %
Actors Theatre	$6,450	$ 5,920	($530)	-8.2%
BalletMet	$77,400	$ -	($77,400)	-100.0%
CAPA	$0	$ 170,800	$170,800	#DIV/0!
CATCO	$74,175	$ -	($74,175)	-100.0%
Chamber Music Columbus	$0	$ -	$0	N/A
CityMusic	$0	$ 4,515	$4,515	N/A
Columbus Children's Theatre	$0	$ -	$0	#DIV/0!
Columbus Museum of Art	$0	$ -	$0	#DIV/0!
Columbus Symphony Orchestra	$0	$ -	$0	#DIV/0!
COSI	$0	$ 1,576,677	$1,576,677	N/A
Friends of Early Music	$3,096	$ -	($3,096)	-100.0%
Jazz Arts Group	$76,755	$ 106,000	$29,245	38.1%
King Arts Complex	$193,500	$ -	($193,500)	-100.0%
MadLab	$0	$ -	$0	N/A
Ohio Art League	$0	$ -	$0	N/A
Ohio Designer Craftsmen	$0	$ -	$0	N/A
Opera Columbus	$0	$ -	$0	#DIV/0!
ProMusica Chamber Orchestra	$102,555	$ -	($102,555)	-100.0%
Thurber House	$135,767	$ -	($135,767)	N/A
Wexner Center for the Arts	$0	$ -	$0	N/A
Total	$669,698	$1,863,912	$1,194,214	
Average	$33,485	$93,196	$59,711	

Figure 5: Corporate Sponsorship

Participation has declined

Alarmingly, the most striking element of our analysis is that ticket and membership revenue has declined 27.3% over ten years, adjusted for inflation, even with the inclusion of the six additional organizations.

An "apples to apples" comparison (Figure 6) shows a 10-year trend analysis with the 14 organizations which received funding in both 1999 and 2009. By reviewing the data exclusive of the six additional organizations who became grant recipients in 2009, the dramatic decrease (34%) in earned revenue is clearly apparent.

On a per capita basis, spending at arts and cultural organizations declined in Columbus from $27.65 to $18.33 from 1998 to 2008. The difference between the change in Columbus's per capita spending and the median of comparable communities is illustrated in Figure 7.

Revenue Type - 1999 Operating Support Grantees Only					
Revenue Type	1999* (n=14)	2009 (n=14)	Change in $	Change in %	Average annual rate of change
Aggregate Earned Revenue	$ 34,458,961	$ 32,387,104	($2,071,857)	-6.0%	-0.6%
Aggregate Ticket & Membership Revenue	$ 17,512,177	$ 11,577,358	($5,934,819)	-33.9%	-3.7%
Aggregate Contributed Revenue	$ 25,350,552	$ 29,382,643	$4,032,091	15.9%	1.4%
Aggregate Sponsorships	$ 669,698	$ 1,859,397	$1,189,699	177.6%	9.7%
Aggregate Corporate Contributions	$ 5,654,300	$ 3,947,747	($1,706,553)	-30.2%	-3.2%
Aggregate Foundation Contributions	$ 1,684,602	$ 3,243,406	$1,558,804	92.5%	6.1%
Aggregate Individual & Board Contributions	$ 5,760,503	$ 12,076,224	$6,315,721	109.6%	7.0%
Aggregate Government Contributions	$ 3,641,515	$ 4,143,008	$501,493	13.8%	1.2%

*1999 is adjusted for inflation

Figure 6: 10 Year Trend Analysis - 1999 Operating Support Recipients

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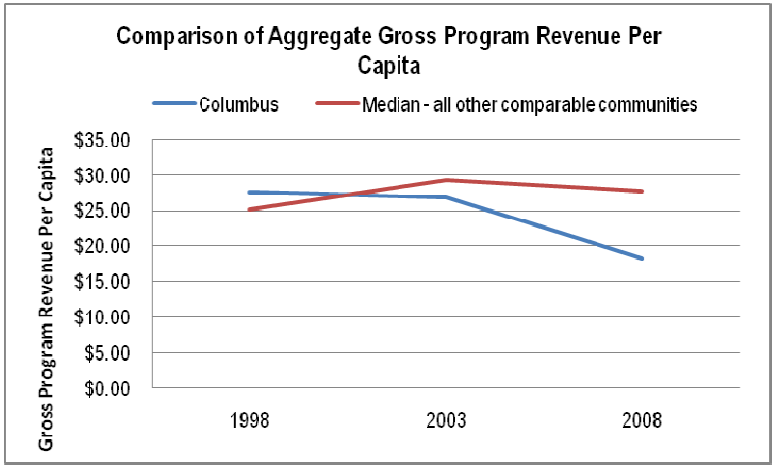

Figure 7: Per capita spending

Therefore, while deep concerns about funding have been expressed in stakeholder interviews, it appears that equal, if not greater, focus must be on increasing earned ticket and membership revenue.

Live entertainment competition has increased significantly

While these declines are consistent with national trends, another possible reason for the decline in earned revenue is the increased competition in the Columbus market for live entertainment. Among the venues that have opened, re-opened, or been renovated since 1999 are:

- Columbus Crew Stadium (1999)
- Ohio State University Jesse Owens Memorial Stadium (2001)
- Nationwide Arena (2000)
- PromoWest Production Facilities – Lifestyles Communities Pavilion (2001)
- Nia Performing Arts Theatre Company (2002)
- PromoWest Production Facilities – A&R Music Bar and The Basement (2003)
- Arts and College Preparatory Academy (2005)
- Wexner Center for the Arts (2005)
- Waterfire Columbus (2005)
- Ohio State University Aquatic Pavilion (2005)
- Lincoln Theatre (2009)
- New Harvest Urban Arts Center (2009)
- McConnell Arts Center (2009)
- Huntington Park (2009)

In addition, there are a number of new organizations that are active in the market.

- Wild Goose Creative (2009)
- Jifunza Theater Company (2009)
- Kristina Isabelle Dance Company (2009)
- Columbus Civic Theatre (2009)
- Cross-Media Collective (2009)
- Summer Fridays at the Ohio Statehouse (2009)

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In addition to examining revenue, we also analyzed operating expenses over a 10 year arc. As noted earlier, the WolfBrown financial analysis noted the decrease in expenses from FY2005 – FY2009. A ten-year analysis, adjusted for inflation, shows that expenses not increased significantly (Figure 8). In other words, the aggregate buying power for these organizations has remained essentially flat for a decade.

Expense Growth - 1999 Operating Support Recipients					
	1999* (n=14)	2009 (n=14)	Change in $	Change in %	Average annual rate of change
Aggregate Expenses	$61,555,625	$ 61,308,296	$ (247,329)	-0.4%	0.0%

* 1999 is adjusted for inflation

Figure 8: 10 Year Expense Growth - 1999 Operating Support Recipients

CCLC Sustainability Analysis

In order to understand how the recent economic recession and weak recovery might further impact the sector, the members of the Columbus Cultural Leadership Consortium ("CCLC") conducted the "10-10-10" sustainability analysis at the request of the Columbus Foundation.[6] As organizations tested the sequential reductions in contributed revenue, many of them determined they could not maintain a sustainable operation. This is largely a result of fixed costs that were impossible to reduce further without a fundamental change in operations and possibly mission.

As a result, many of CCLC organizations discussed with us how declining resources would reduce their public value and positive impact on community vitality in Columbus and Franklin County. In particular, the following themes emerged from the analysis:

- Further decreases in contributed revenue is particularly harmful because there are insufficient endowment revenues to offset the lost revenue

- Organizations would fundamentally change, including moving from presenting professional artists to non-professional artists, shifting the compensation of performers from a salary structure to a "per service" structure, reduce the overall volume programming, and the possibility that facilities would have to close as a result of insufficient operating funds

[6] This analysis looks at each individual cultural organization in the CCLC to determine the impact of an annual 10% reduction in contributed revenue for the next three years. The 10-10-10 analysis also asked organizations to define the activities of a sustainable operation, as well as the activities of an organization that was below the threshold of sustainability. Organizations shared individual analysis with AMS after execution of a non-disclosure agreement; therefore, only aggregate themes and trends are presented here.

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- As a result of inevitable reductions, there would be a net loss of the amount of public value that arts and cultural organizations could contribute to the community, including the loss of services to children and underserved communities.

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Understanding Change

The National Scene

There has been a significant amount of change in the national arts sector over the past several years. In many cases, this change is consistent with experiences across Columbus's arts sector.[7] For example:

- National attendance in "benchmark" cultural activities (e.g., ballet, classical music, opera) has declined by as much as 30% over the past 26 years.[8]
- The buying power for 85% of producing theatre companies has remained the same or has declined in the past decade.[9]
- Somewhat differently, while there have been gains in some sectors of philanthropy in Columbus, philanthropic support for the arts nationally has remained in seventh place among ten giving categories for the past decade.[10]

Changes in Columbus

Columbus as a community has an interesting economic and demographic profile, as they are somewhat different than many other communities. In some ways, many key demographics have not changed for Columbus during the 2000's.

- The rate of population change has hovered around 5.5% for three five year blocks (2000-2005, 2001-2006, and 2002-2007).[11]
- The percentage of the population that is foreign born has hovered around 6.0% from 2005 – 2007.[12]
- The ethnic and racial composition of Columbus has remained steady since 2005, with about 20% of the population part of a minority racial or ethnic group.[13]

[7] For more detailed information on national trends, please refer to the research digest which is appended to this report.
[8] National Endowment for the Arts. *2008 Survey of Public Participation in the Arts*. Washington, DC: November 2009. p. 3.
[9] Voss, Zannie Girard, Glenn B. Voss, Christopher Shuff, et al. *Theatre Facts 2009: A Report on Practices and Performance in the American Not-for-profit Theatre Based on the Annual TCG Fiscal Survey*. Theatre Communications Group. New York: 2010. p. 19.
[10] The Center on Philanthropy at Indiana University. *Giving USA 2010: The Annual Report on Philanthropy for the Year 2009*. Giving USA Foundation. Indianapolis: 2010. p. 9.
[11] The Columbus Partnership and Community Research Partners. *Benchmarking Central Ohio 2009*. p. 1-6
[12] Ibid. p. 1-8.
[13] Ibid. p. 1-9.

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- The median age has remained exactly 34.9 years three years in a row (2005 – 2007).[14]

A number of other indicators of economic strength have also remained stable, including maintaining the number of Fortune 1,000 firms (15), and that 80% of all firms are small (less than 20 employees) representing a diversified economy.

Benchmarking Central Ohio 2009 notes that Columbus is, in some ways, like a fast growing area, with a low percentage of seniors and a low median age. However, the community also exhibits characteristics of a slow growing area, especially with indicators such as lower net growth in the number of business firms and fewer new small business establishments.[15]

While Columbus's local economy has grown over the past decade, it has shifted from exceeding the national rate to not keeping pace with other metropolitan areas. Figure 9 compares the growth in Columbus's GDP with that of all U.S. cities.

To address these and other issues of community competitiveness, The Columbus Partnership and other

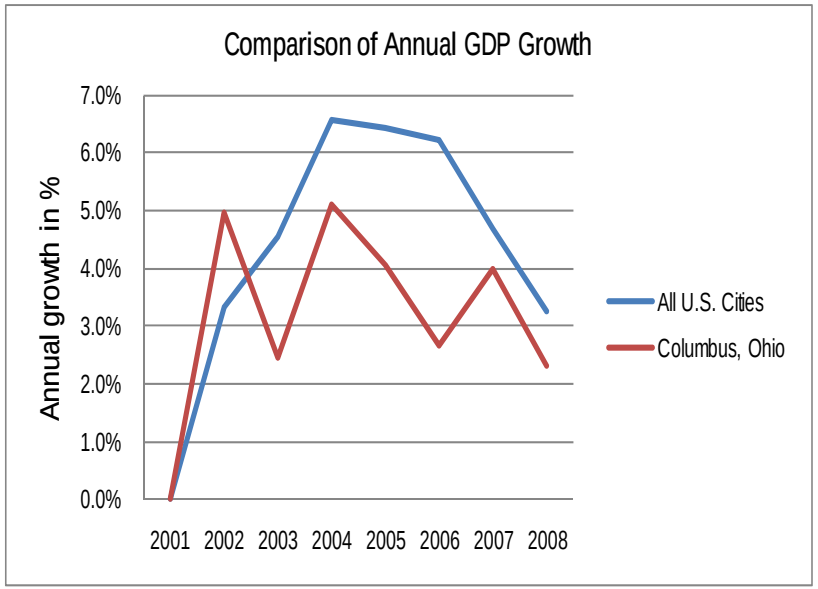

Figure 9: Comparison of Annual GDP Growth (Source: Bureau of Economic Analysis, U.S. Department of Commerce)

leadership organizations have laid out a regional economic development plan in *Columbus 2020!* This plan outlines three distinct, specific goals:

1. "Add 180,000 net new jobs by 2020
2. "Increase personal income per capita 40%, or $15,000, by 2020
3. "Become a recognized national leader in economic development by 2020[16]

[14] Ibid. p. 1-12.
[15] Ibid. p. 1-4.

[16] The Columbus Partnership. *Columbus 2020! A Regional Economic Development Plan*. 2009. p. 20.

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The plan also outlines three areas of strategic focus:

1. "Retain and expand the companies and industries that call Central Ohio home today
2. "Attract major employers to establish operations in Central Ohio
3. "Create more commercial enterprises by leveraging our tremendous research assets and entrepreneurs[17]

As noted in the WolfBrown Cultural Plan, there are opportunities for the arts and culture sector to be a critical partner in accomplishing these strategies and they should articulate their shared commitment to a successful Columbus by:

A. Contributing to Columbus' competitiveness by helping to tell the Columbus story
B. Aligning with broad community goals
C. Pursuing partnerships with business, government, education, sports, tourism and entertainment
D. Achieving further efficiency and right-sizing by promoting strong management practices…that align with community capacity and demand[18]"

[17] Ibid. p. 21.
[18] Culbert, Jane and Thomas Wolf. "Final Report on the future of the arts in Columbus, Ohio Financial Analysis for the Columbus Arts Sector." WolfBrown. November 2009. p. 14-15.

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Benchmarking and Best Practices

Columbus's arts and cultural organizations face a difficult and challenging environment. This condition is compounded by the dichotomy of the importance of the arts sector in creating and articulating "public value" (i.e., meaningful, positive benefits to the community) and the relative losses of attendance and support over the past decade. These changes are made more complex by the shifting nature of the Columbus entertainment marketplace and changing community priorities.

A central questions is whether or not the community's arts and culture sector is "right-sized" and if it is sustainable. Our initial approach was to measure the sector and contrast it to comparable communities to develop benchmarks of success.

We quickly learned that we needed to better define our concept of "sustainability." The arts and culture sector has long debated the notion and various initiatives from the Ford Foundation's early work in building business skills through to efforts by the National Arts Stabilization Fund to build stronger balance sheets have been implemented yet there is still no clear solution to the most vexing problem facing the sector.

The role of capitalization

It is self-evident to most that the not-for-profit arts sector operates with different expectations than the corporate world. But, many do not realize that perhaps the most significant distinction is that individual organizations and the sector as a whole are fundamentally under-capitalized or capitalized inappropriately; often as a result of misplaced assumptions about operating requirements and sustainability. While obvious to some, lack of appropriate capitalization is, in fact, an endemic problem in not-for-profit sector, as Clara Miller notes in her article *Hidden in Plain Sight*:

> "The reasons for the neglect of capitalization run deep in nonprofit culture. Managers, employees and funders share the belief that energy, willpower, stamina, and enthusiasm can overcome all obstacles, and that where it does not, some sort of personal failing is to blame. The idea that an inappropriate capital structure can subvert an organization's ability to meet its objectives can seem overly deterministic, even fatalistic. In the face of adversity, the temptation is to say, 'We must work harder,' rather than to look at the

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balance sheet—where money is or is not allocated—for systemic reasons for failure."[19]

The WolfBrown cultural plans recommends that the cultural sector align itself with four community goals

1. Foster Economic Development
2. Enhance Branding and Marketing
3. Attract, Develop, and Retain a 21st Century Workforce
4. Promote Efficiency and Effectiveness[20]

If the sector is to succeed and contribute to realizing these goals then its business model must be robust and reliable; in other words, "sustainable." Without adequate capitalization this will not be possible.

"Sustainable" defined

As we pursued the notion of sustainability, we needed to better define measures or indicators of "right-sized" through field research and stakeholder conversations. It quickly became apparent to us that sustainability is a place on a continuum of operating outcomes. There are distinct levels; each reflecting different degrees of organizational health, capacity and required capitalization – whether in an individual organization or the arts sector as a whole. The three levels we have defined for this project are:

- "Viable" – the capability to function in the short-term, but limited in the capacity to adapt and grow
- "Sustainable" – the ability to meet present needs, but also to generate enough resources to deliver on mission in changing environment
- "Vital" – access to sufficient resources to allow the organization to fulfill its mission, reinvest in its future, and maximize its public value by evolving to meet future needs[21]

We recognized that one could conclude that the arts sector in any given community was "not viable," but as Miller notes, there is a tendency to appear viable by "working harder" and thus clear metrics are harder to come by.

Helping to make Columbus a win

It is apparent from our conversations with leaders in all sectors that they share the goal of a Columbus arts and culture sector that does not just survive, but is one that can thrive. Our interviews with arts leaders, government and business partners and philanthropists repeatedly articulated

[19] Miller, Clara. "Hidden in Plain Sight: Understanding Nonprofit Capital Structure." *The Nonprofit Quarterly.* Spring 2003. p. 6.
[20] Culbert, Jane and Thomas Wolf. "Financial Analysis for the Columbus Arts Sector." WolfBrown. November 2009. p. iv.

[21] Adapted, in part, from the United Nations World Commission on Environment and Development. 1987. p. 24, Section 27.

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the importance of a successful arts sector in making Columbus a win. The Urban Institute, a Washington, DC-based think tank, has documented how a vital arts sector contributes to community vitality and identified three critical strategies that help achieve success. Vital communities had arts systems that:

- Facilitated the presence of opportunities for cultural expression
- Enabled participation in arts and cultural activity
- Provided support for arts and cultural activity[22]

In Columbus, many leaders were uncertain as to how to best position and resource the arts sector for success. Using these characteristics, we studied comparable communities[23] and identified indicators of success.

Structure and Methodology

To determine if the Columbus arts sector was sustainable in aggregate, we initially explored how other communities had approached this issue. We discovered efforts in determining the vitality of the national arts sector (e.g., the Americans for the Arts Cultural Vitality Index), and while Urban Institute's work demonstrates a clear connection to community vitality, we found no study that had yet attempted to quantify the characteristics that contribute to or determine what comprises a sustainable cultural sector.

We looked to other sectors as well and determined that the most appropriate method was to build a model of the Columbus arts sector and test it against others to identify the key differences in the systems. Since there are no standard measures of sustainability, we polled colleagues, utilized our industry knowledge and field contacts to identify key measures of sustainability in the arts sector.

The resulting analytical model is composed of indicators in the following areas in both absolute measure and change over time:

1. Attendance and Market – How much is spent in the market on arts activity? What is the relationship between ticket price and household income? What is the overall market potential?
2. Contributed Income – What portion of contributed dollars from institutional donors goes towards the arts? How many households contribute to the arts? What size are the contributions?
3. Human Capital – How many artists reside within the community? How many arts professionals are employed in the community?
4. Assets – What is the extent and condition of the physical assets? What financial assets are supporting cultural organizations?

[22] Jackson, Maria Rosario, Florence Kabwasa-Green, and Joaquin Hernandez. *Cultural Vitality in Communities: Interpretation and Indicators*. The Urban Institute, November 2006.
[23] Based on the Columbus Partnership's benchmarking efforts

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5. Product – What are the number of arts, cultural and live entertainment options? What is the quantity of events within the community?

An important note

The arts sector is notoriously deficient in collecting and analyzing data. There are few consistent sources of historical data in individual markets, much less consistent data across multiple markets[24]. Given the limitations of our scope and finite resources, much our analysis had to revert to using third party data for the sake of consistency, most significantly the IRS form 990[25] which charitable organizations are required to file with the federal government each year[26]. A summary of all data sources are listed at the end of this report.

[24] Projects like the Pew Charitable Trusts Cultural Data Project are too new to provide trend data and sources like the Ohio Arts Council and the Greater Columbus Arts Council only have data on grantees thus excluding information for large numbers of organizations which comprise the arts and cultural sector. These entities also do not collect data in all of the benchmark communities, preventing "apples to apples" comparisons.

[25] Electronic data was provided to AMS by the National Center for Charitable Statistics. A unit of The Urban Institute

[26] The most significant limitation of the Form 990 is that until a redesign in for reporting beginning with fiscal year 2009 it combined all types of contributed revenue (operating and capital) and without significant forensic accounting efforts the distinct values cannot be separated.

Indicators of Sustainability

We developed multiple indicators within each of above categories and then compared the Columbus arts sector to the 14 communities identified in The Columbus Partnership's benchmarking reports as comparable communities.[27] Initially, we identified 28 indicators (see Appendix D for the original list) in these five areas. Further analysis revealed that there were statistically insignificant variations in about half of these indicators. Therefore, we refined our analysis to focus on those indicators with meaningful variations. The key indicators that were used in our analysis are:

1. Aggregate sales volume (which serves as a proxy for attendance[28])
2. Change in sales volume over time
3. Public sector support
4. Change in public sector support over time
5. Private sector support
6. Change in private sector support over time
7. Average building, land and equipment value after depreciation
8. Aggregate working capital
9. Aggregate endowment value

[27] We excluded Chicago from our analysis because we determined that it was too large to make meaningful comparisons to Columbus's arts and culture sector.

[28] Attendance data is not collected in Form 990

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10. Total number of seats in all arts, culture and entertainment venues
11. Average budget size
12. Likelihood of belonging to an arts association
13. Artist wages as a function of all community wages

The values for each of these key indicators, as well as their calculated indices, are detailed in the Appendix A of this report.

Comparable communities

Recognizing that no community is absolutely analogous to Columbus, the Columbus Partnership benchmark communities, against which Columbus measures its relative performance, all have significant arts and cultural sectors and were deemed appropriate for our analysis. Learning about the differences in each of these communities will help us to understand why some succeed and other do not. The fourteen communities are:

1. Austin, Texas
2. Charlotte, North Carolina
3. Cincinnati, Ohio
4. Cleveland, Ohio
5. Indianapolis, Indiana
6. Jacksonville, Florida
7. Kansas City, Missouri
8. Louisville, Kentucky
9. Milwaukee, Wisconsin
10. Minneapolis, Minnesota
11. Nashville, Tennessee
12. Portland, Oregon
13. Raleigh, North Carolina
14. San Diego, California

To compare data from market to market, we converted absolute value for each of the indicators to an "index value," with a score of 100 benchmarked to the mean absolute value for each indicator. Then, each variable was scaled proportionally to demonstrate relative success within each indicator. Therefore, the relative differences in the indices provide a good measure of relative outcomes and help uncover the strengths and weaknesses of Columbus's arts and culture sector when compared to other communities.

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SUSTAINABILITY INDEX

Once we developed the individual indices for each measure, we created a composite index for each city and determined that there were distinct modal groups in the analysis. Ranges for each of our categories are:

Viable	Less than 1299
Sustainable	1300 - 1500
Vital	1500 and above

The comparable communities ranked in the following manner:

City	Composite Index Score	Sustainability Level
Minneapolis	2358	Vital
Indianapolis	2125	Vital
Cleveland	1952	Vital
Kansas City	1430	Sustainable
Cincinnati	1344	Sustainable
San Diego	1209	Viable
Raleigh	1138	Viable
Charlotte	1119	Viable
Columbus	1100	Viable
Louisville	1014	Viable
Austin	977	Viable
Portland	958	Viable
Milwaukee	924	Viable
Nashville	924	Viable
Jacksonville	899	Viable

Figure 10: Ranking of communities by sustainability index

The composite analysis suggests that while the Columbus arts sector like many others is viable, that it has not reached the level of "sustainable" or "vital" that some other communities have achieved. These metrics and analysis align with qualitative observations and the research undertaken by WolfBrown.

Most simply, while the sector has enough resources to keep going, but it does not have sufficient resources for future adaptation and growth or to effectively maximize its contribution to public value. In short, the sector is "under-capitalized."

In the sections which follows, we compare Columbus to the best-performing communities.

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Revenue Benchmarks

The three "vital" communities of Minneapolis, Indianapolis and Cleveland offer important contrast to Columbus and illustrate many factors which contribute to sustainability and vitality in the arts and cultural sector.

Looking at revenue sources, an important first measure is "gross aggregate sales per capita" which is particularly strong for Minneapolis and Cleveland and, as figure 11 illustrates, have increased considerably from 1998 to 2008.

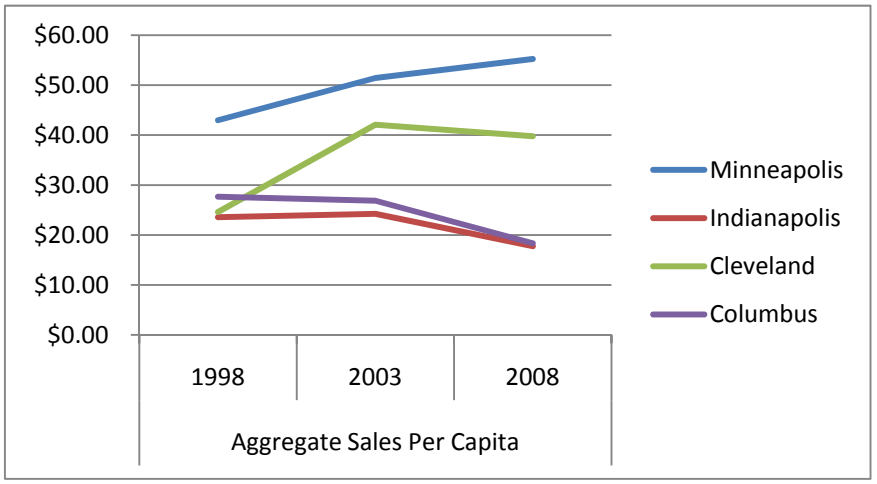

Figure 11: Aggregate Sales Per Capita

	Aggregate Sales Per Capita			Change	Change
	1998	2003	2008	in $	in %
San Diego	$15.07	$22.24	$31.92	$16.85	111.8%
Cleveland	$24.59	$42.08	$39.77	$15.18	61.7%
Minneapolis	$42.98	$51.42	$55.25	$12.27	28.6%
Milwaukee	$34.10	$50.10	$45.15	$11.05	32.4%
Raleigh	$22.34	$29.13	$28.37	$6.03	27.0%
Kansas City	$19.09	$26.17	$24.18	$5.09	26.7%
Charlotte	$19.56	$26.36	$22.25	$2.69	13.8%
Portland	$29.64	$29.50	$29.61	($0.03)	-0.1%
Nashville	$28.89	$29.69	$28.18	($0.71)	-2.5%
Austin	$14.08	$17.04	$12.95	($1.12)	-8.0%
Cincinnati	$32.39	$31.10	$30.65	($1.74)	-5.4%
Jacksonville	$20.34	$12.09	$15.66	($4.68)	-23.0%
Indianapolis	$23.56	$24.23	$17.75	($5.81)	-24.7%
Louisville	$23.62	$22.15	$16.46	($7.16)	-30.3%
Columbus	$27.65	$26.86	$18.33	($9.33)	-33.7%

Figure 12: Change in per capita spending

It is interesting to note that in 1998, Columbus's aggregate sales per capita were higher than both Cleveland and Indianapolis, but by 2008, Columbus had experienced the greatest rate of decline. Figure 12 illustrates the changes in aggregate sales per capita in Columbus compared to all benchmarked communities.

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The three "vital" communities are also particularly strong in public funding per capita. As figure 13 shows, Columbus

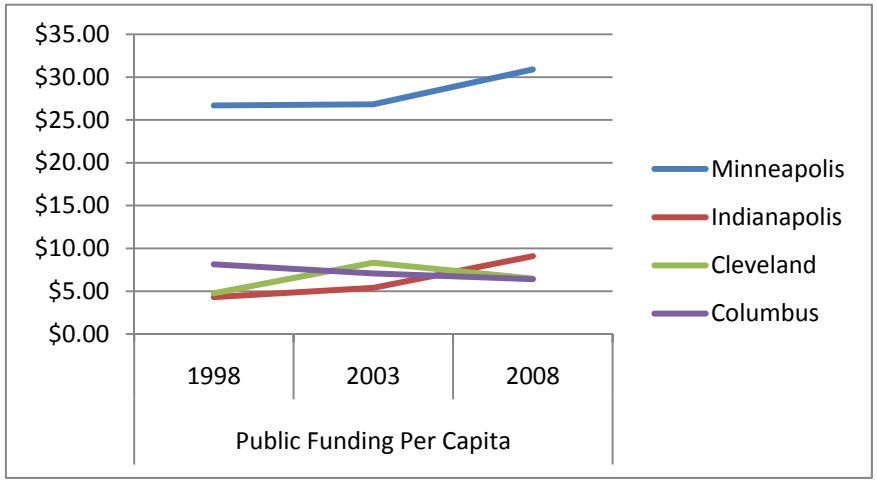

Figure 13: Public funding per capita

experienced a significant rate of decline in public sector funds during the same ten-year period[29].

Finally, these three communities also exhibit strength in private sector funding per capita. Figure 14 contrasts Columbus's private sector funding with Minneapolis, Indianapolis and Cleveland.

While Columbus's private sector funding is significantly less than the other communities, it is worth noting that Columbus had a great deal of improvement from 1998 to 2008, with a 39.9% increase in contrast to recent declines in Indianapolis.

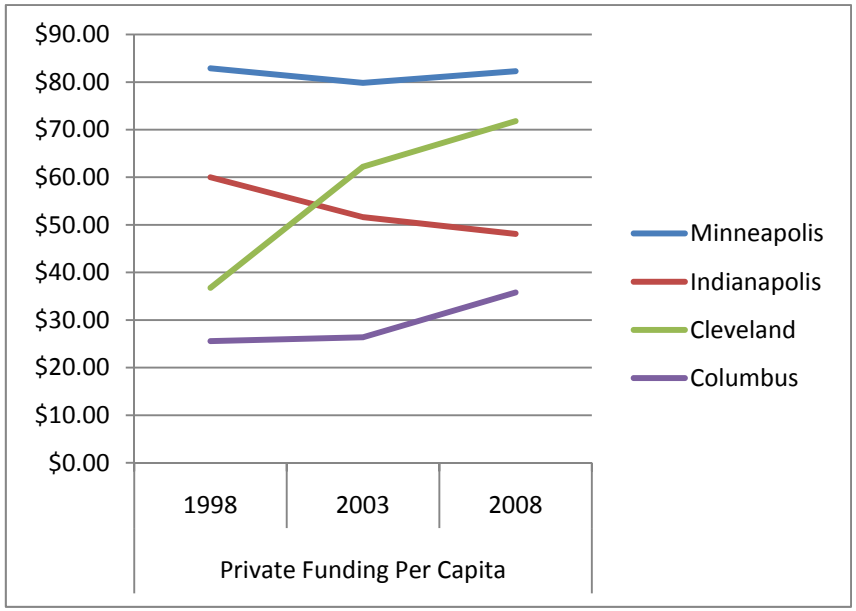

Figure 14: Private sector funding per capita

Endowments

In addition, all three vital communities had more significant combined endowments than Columbus. Figure 15 shows how the vital communities maintained or grew significant endowment values from 1998 – 2008 in the vital communities, compared to Columbus which had virtually no change in endowment value during the same period.

[29] The new cigarette tax is Cleveland is not yet reflected in FY 2008 Form 990s as the first distributions were made in FY 2009

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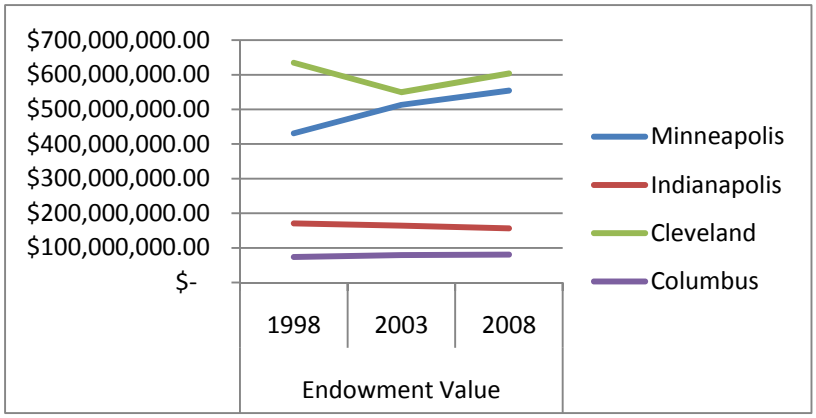

Figure 15: Endowment values

Expense Benchmarks

The long term benefit of the vital communities' investment in the arts and cultural sector is evident in the growth of the aggregate expenses of these organizations, which speaks to an increase in their collective buying power. Figure 16 illustrates that all three vital communities had a net increase in aggregate expenses from 1998 – 2008 (adjusted for inflation), whereas Columbus had a net loss.

This is particularly interesting because Columbus had a net increase in the number of organizations, whereas both Indianapolis and Cleveland had a net loss (Figure 17).

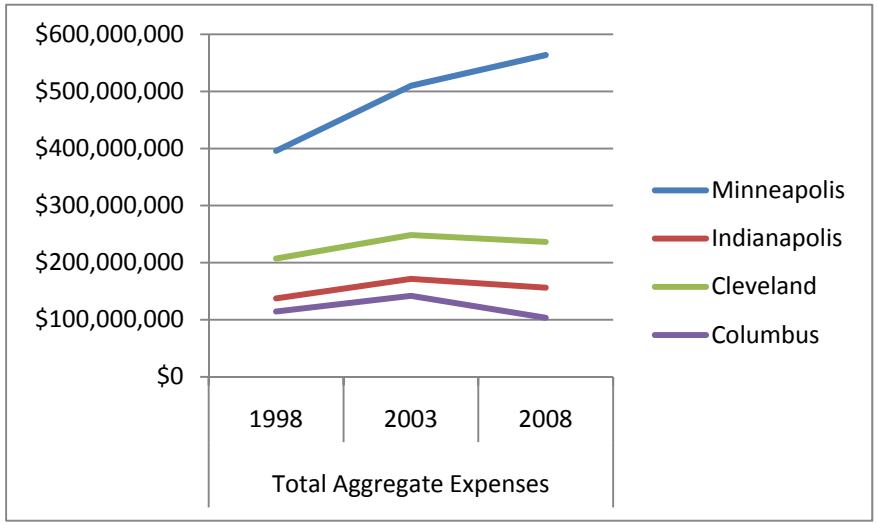

Figure 16: Aggregate expenses

	1998	2008
Minneapolis	77	96
Indianapolis	30	26
Cleveland	34	30
Columbus	19	26

Figure 17: Number of organizations

As a result, on average, each Columbus arts organization has less buying power than those in the sustainable communities.

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Best Practices

Having identified communities with high performing arts and cultural sectors we set out to understand the strategies which distinguished them.

Cleveland

Contributed support

While Cleveland has a comparable number of Fortune 1,000 companies (18 compared with Columbus's 15), it has been particularly successful in achieving contributed revenue for two reasons. There are a substantial number of foundations in Cleveland which support the arts (58, compared to Columbus's 24).[30] These foundations' giving to the arts amounts to $107.43 per capita, which is almost double Columbus's foundations' giving of $55.23 per capita.[31]

Cuyahoga County enacted a cigarette tax in 2007 which has produced more than $48 million since its inception.[32] This influx of funding has benefited over 100 organizations within the county. While there is general acknowledgement that this dedicated tax revenue stream will decline over time (for example, the 2010 revenue is projected at $17 million, which is down from a high of $20 million in 2008). In order to manage this trend, the fund does not distribute 100% of its tax revenues each year. Instead, it retains some funds so that it can continue to offer grants at consistent funding levels from year to year.

Sector Contraction

Perhaps counter-intuitive to the notion of a vital sector, there has been noticeable change in Cleveland arts sector over the past decade. In 2000, the Cleveland Ballet ceased operations, as did the Ohio Ballet in 2006. Also in 2006, the Cleveland Opera merged with Lyric Opera Cleveland. Great Lakes Theatre Festival and DanceCleveland also had to restructure and stabilized as smaller organizations. The Cleveland Playhouse has recently reached an agreement to sell its facility and relocate to Playhouse Square in reconfigured space that will also house the theater programs of Cleveland State University.

Despite the contractions of these legacy organizations, the total number of cultural organizations has grown. In 1998, 34 organizations had expense budgets of over $500,000, and in 2008, 43 organizations had expense budgets of over $500,000. It may be that by allowing market forces to close unsuccessful

[30] Benefactors Counsel, LLC. *Building Creative Capital: Reflections on the Assets to Sustain Robust Arts and Culture in Columbus*. Greater Columbus Arts Council. Columbus, Ohio: 2004. p. 3.
[31] Ibid. p. 14.
[32] Washington, Julie. "Cuyahoga Arts and Culture Decides on Revenue Pool from Cigarette-Tax Money. *The Plain Dealer*. Monday, September 13, 2010. Accessed at www.cleveland.com.

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organizations, resources were freed up to allow other organizations to emerge, grow and thrive.

Indianapolis

Arts Council Strength

Part of the reason for the health of the arts sector in Indianapolis is the strength of its arts council, which is one of the most highly regarded in the country. It is considered an effective advocate for the arts and culture sector and through its efforts is able to convince the City of Indianapolis to maintain its annual funding to arts organizations ($1 million in total).

In addition, the arts council has also had success in promoting shared services among regional arts organizations. Perhaps its greatest success has been its online events calendar at indyarts.org. In addition to providing a centralized location to post arts and cultural events, it shares this information with a number of partners, including the Indianapolis Star and the Indianapolis Convention and Visitors Association. It also has a weekly email newsletter, which goes to 5,000 arts patrons per week. This level of coordination and communication permits constant contact with potential audience members with minimal effort for arts organizations. In addition, by feeding the information to other websites, it helps insure that all of the information about cultural events is consistent and correct.

The Indianapolis Cultural Development Commission

Another way in which arts organizations have collaborated in Indianapolis has been through the Indianapolis Cultural Development Commission (ICDC). The ICDC is an unincorporated association that works towards four goals:

- Stimulate increased local cultural participation by residents
- Maximize the cultural experience for existing and event visitors
- Strengthen Indianapolis and Central Indiana as a unique cultural destination to attract new tourists
- Build a sustainable infrastructure to support cultural development

The ICDC's primary programs are:

- Fast Track Funding – Grants up to $100,000 to develop and market cultural and artistic events and activities that support cultural tourism

- Public Art Indianapolis – Curates a "Great Ideas Competition," outdoor exhibitions, a Public Art Locator, and Picture Windows. The purpose is to increase access to art, extend cultural institutions' reach, provide artists with opportunities to expand their artistic practice and market.

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- "Be Indypendent" – Supports all things unique to Indianapolis. It began as a buy local art campaign, but has evolved to include independent businesses. The program provides tools and resources to individuals and business on how to buy local art. It partners with design professionals to encourage them to incorporate local art into their projects

- Cultural Districts Program – Designed to leverage arts and cultural offerings, local restaurants and retail shops in six specific neighborhoods. It primarily focuses on marketing, wayfinding and real estate development, and it publishes a cultural districts guide which features the unique aspects of each district, and the directory features hotels, galleries, restaurants, theatres, taverns/bars, and retail.

IDCD is a nine member commission established by the Capital Improvement Board of Managers of Marion County, Indiana. The arts council chair, the CVB chair, and the downtown improvement district chair are members, with the remainder of commissioners appointed by the mayor. Programs are supported by the Lily Foundation with approximately $1.25 million in funding per year. Programs are managed by other organizations, primarily the arts council and downtown improvement district.

Minneapolis-St. Paul

Philanthropic Leadership

A large part of the vibrancy of Minneapolis's arts and culture sector is due to corporate philanthropy. Minneapolis benefits from having 32 Fortune 1,000 companies in the area. Notably, Target Corporation has assumed a leadership role in arts funding, contributing approximately $4.5 million to arts organizations in a seven-county region.

Additionally, Minneapolis has experienced an arts boom in recent years, with an investment of $500 million in the arts sector, including major capital projects such as the new Guthrie Theater and Walker Arts Center.

Alignment with City Goals

The Minnesota Arts Commission, the city department charged with cultural affairs, has planned carefully to align its priorities with that of the City of Minneapolis. The City outlined eight goals:

1. Build communities where all people feel safe and trust the City's public safety professionals and systems
2. Maintain the physical infrastructure to ensure a healthy, vital and safe City
3. Deliver consistently high quality City services at a good value to our taxpayers
4. Create an environment that maximizes economic development opportunities within Minneapolis

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5. Foster the development and preservation of a mix of quality housing types
6. Preserve and enhance our natural and historic environment and promote a clean, sustainable Minneapolis
7. Promote public, community and private partnerships to address disparities and to support strong, healthy families and communities
8. Strengthen City government management and enhance community engagement

In response to the City's priorities, the Minneapolis Arts Commission's plan outlined seven recommendations:

- Integrate and use arts and culture as a resource for economic development;
- Develop robust City leadership on behalf of cultural development;
- Increase resources for arts and culture and Minneapolis;
- Strengthen the City's public art program by providing a definite funding commitment and strengthening policy;
- Promote the City's arts and culture to residents, visitors and civic and community leadership as an integral aspect of Minneapolis's identity, quality of life, economic vitality and civic health;
- Promote collaborations among arts and cultural organizations and artists, and with the City and other partners; and
- Preserve and strengthen arts education opportunities for Minneapolis youth.

To further integrate its initiatives with the City, the Minneapolis Arts Commission identified the key agencies and departments to maintain relationships, and grouped them together as an "arts and culture coordinating committee."

State Funding Initiatives

Perhaps most notably, part of the success of Minneapolis arts organizations is linked to the success of statewide arts funding. In November 2008, Minnesotans passed through referendum the clean water, land, and legacy amendment to the Minnesota Constitution, which allocated 3/8 of the state sales tax to environmental and cultural purposes. Of these funds, 19.75 percent will go to an arts and heritage cultural fund.

For the two-year period from July 2009 through June 2011, the Minnesota State Legislature has appropriated nearly $60 million to the Minnesota State Arts Board and Minnesota's

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eleven regional arts councils.[33] For comparison, $20 million was allocated for fiscal years 2007 and 2008.[34] These funds will help make high-quality arts experiences more accessible and available to Minnesotans throughout the state.

[33] National Assembly of State Arts Agencies. "Legislative Appropriations Preview, Fiscal Year 2011." p. 2.
[34] National Assembly of State Arts Agencies. "Legislative Appropriations Annual Survey, Fiscal Year 2008." p. 10.

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Opportunities for increased efficiency

Organizational stress is felt most strongly among larger institutions.

In the August and September 2010, AMS administered surveys to Columbus to assess needs and opportunities. Some of the data supported the conclusions from our earlier analyses. For example, 57% of large organizations (those with budgets over $500,000) do not believe that they have adequate resources to support their administrative functions adequately (Figure 18).

In addition, large organizations were focused on the decline in contributed revenue.

Interestingly, large organizations felt that there had been an increase in overall audience and participation, with 66% of organizations agreeing with the statement that overall audience and participation has increased. This data point contrasts sharply with the ten-year decline in aggregate revenue; therefore, either attendance has remained the same or better and ticket prices have decreased, or organizations may not be aware of the decline over a long period of time.

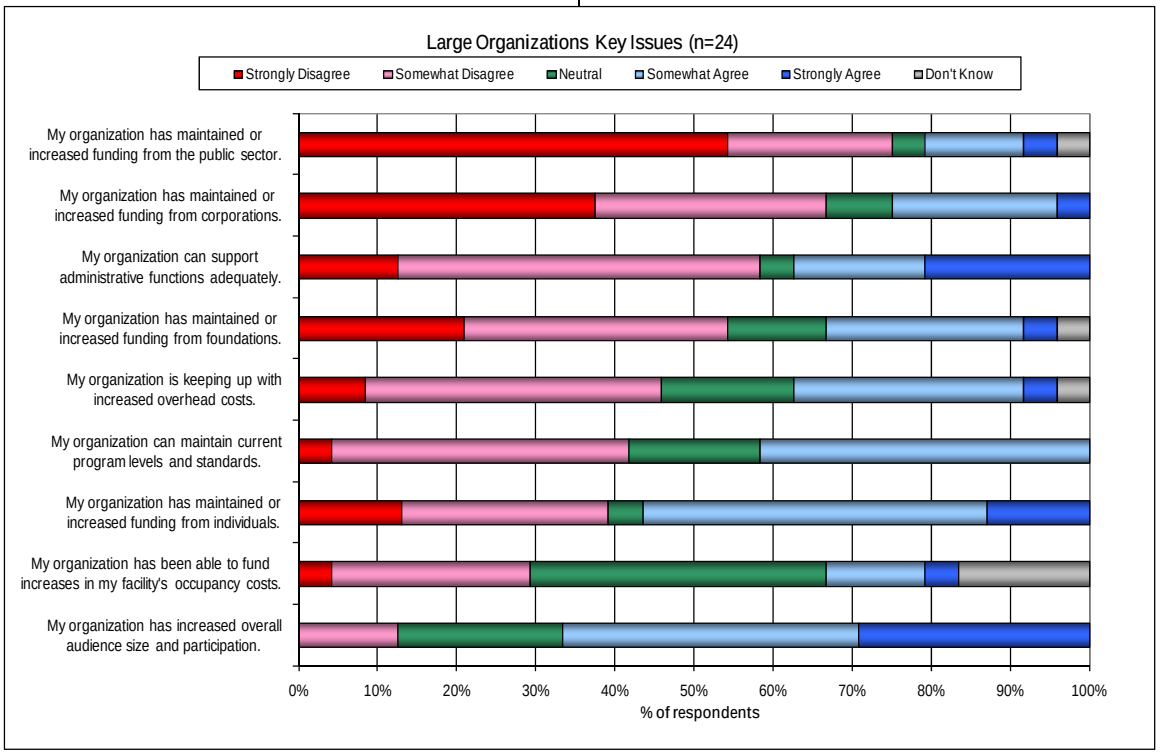

Figure 18: Key Issues

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Small organizations indicated many of the same concerns as large organizations, with one important exception. While 41% of large organizations do not believe that they are able to maintain current program levels and standards, only 14% of small organizations disagreed with that statement (Figure 19).

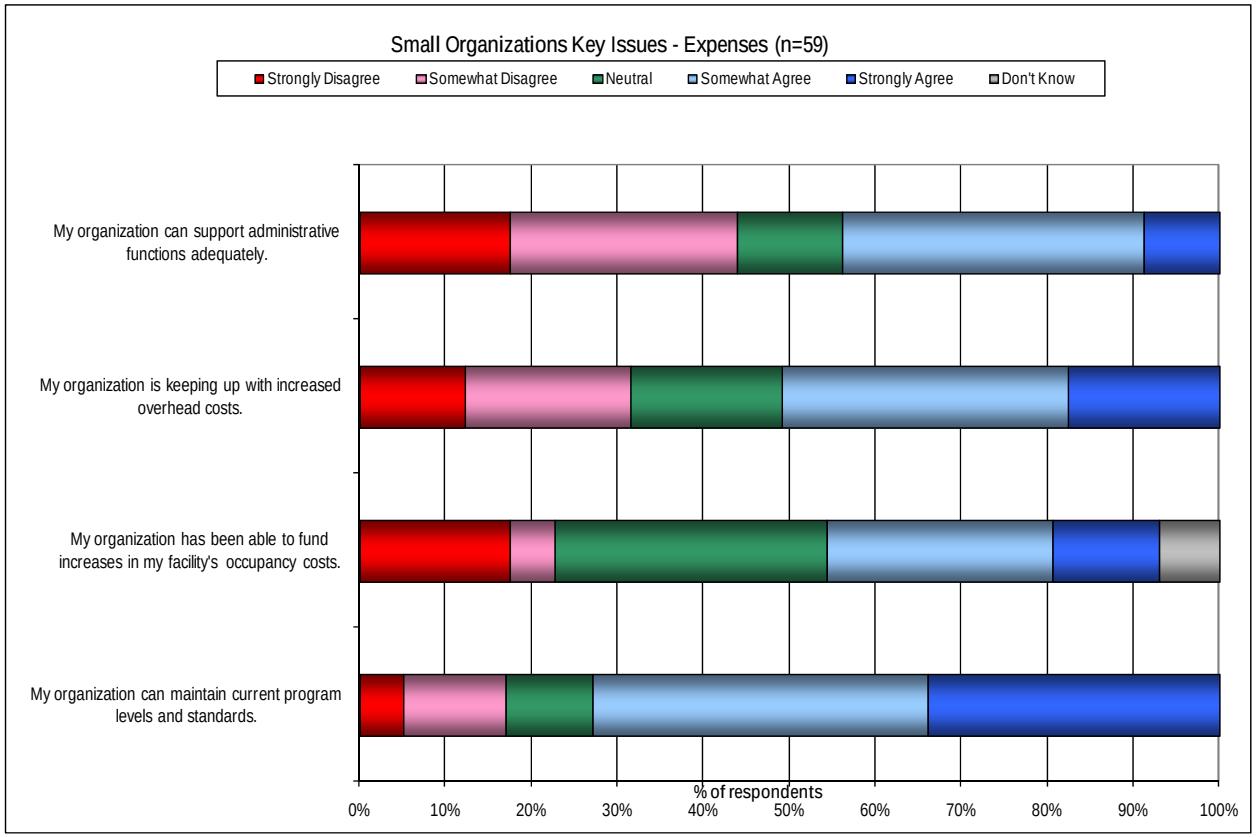

Figure 19: Key Issues - Small Organizations

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Opportunities to collaborate

Among the questions AMS tested was the notion that there were significant opportunities for increased efficiency in the operation of Columbus's arts organizations. Recognizing that there has already been significant consolidation in the sector, we tested functions that are currently outsourced, the satisfaction with current partnerships, and the interest and usefulness for additional partnerships. Figure 20 illustrates which functions are in-house, which are outsourced, and which do not exist at all.

Nearly every organization provides their own engagement (community outreach) opportunities for traditionally underserved audiences as well as their own fundraising.

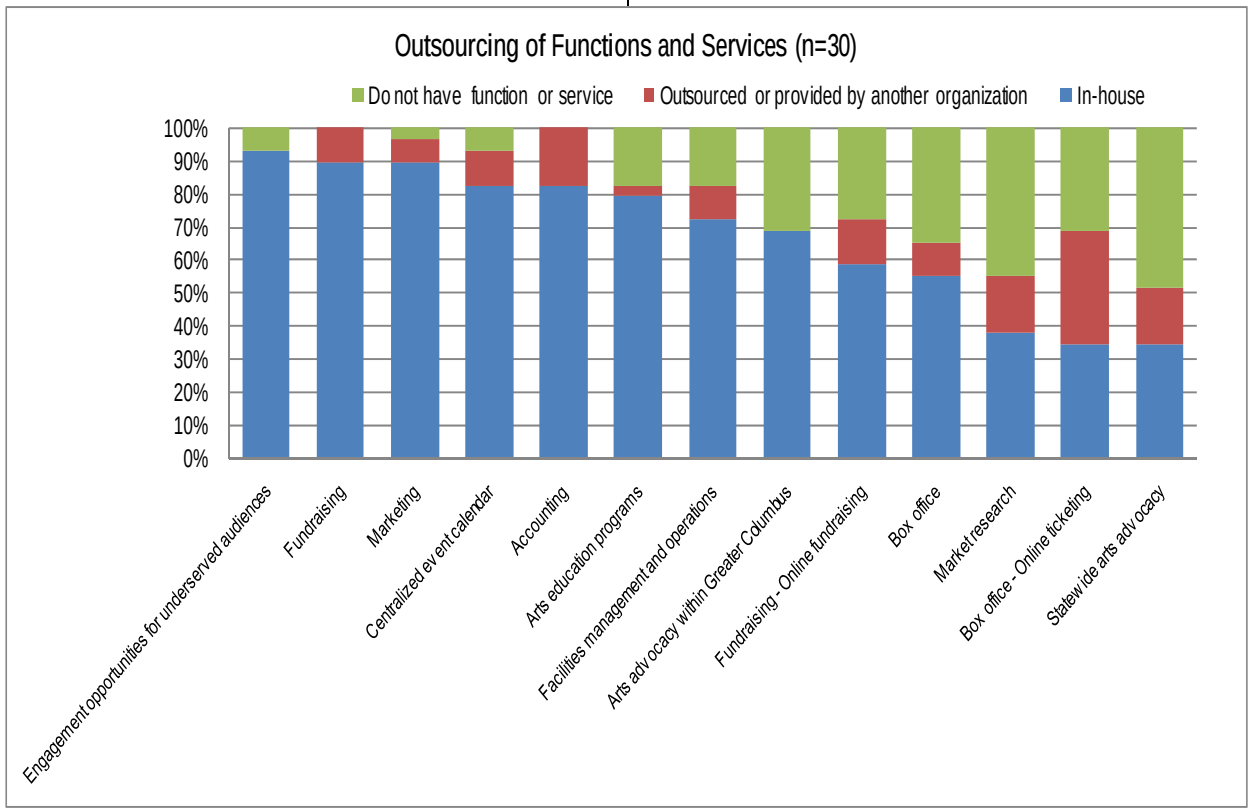

Figure 20: Outsourcing

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The majority of organizations did not have any market research capability. For those organizations which outsource some of their administrative activity, they were generally satisfied with the arrangement (Figure 21). Survey respondents were also asked about their interest and usefulness of additional services. Figure 22, on the following page, shows that there was particular interest in increased collaboration for advocacy, collaborative fundraising and market research. Many interviewees noted that the administrative operations and facility operations have become more centralized over the past decade, mostly through CAPA's infrastructure. While some partnerships are still new (most notably the Columbus Symphony Orchestra's relationship), many organizations have been working with CAPA for years.

Figure 21: Quality of Service

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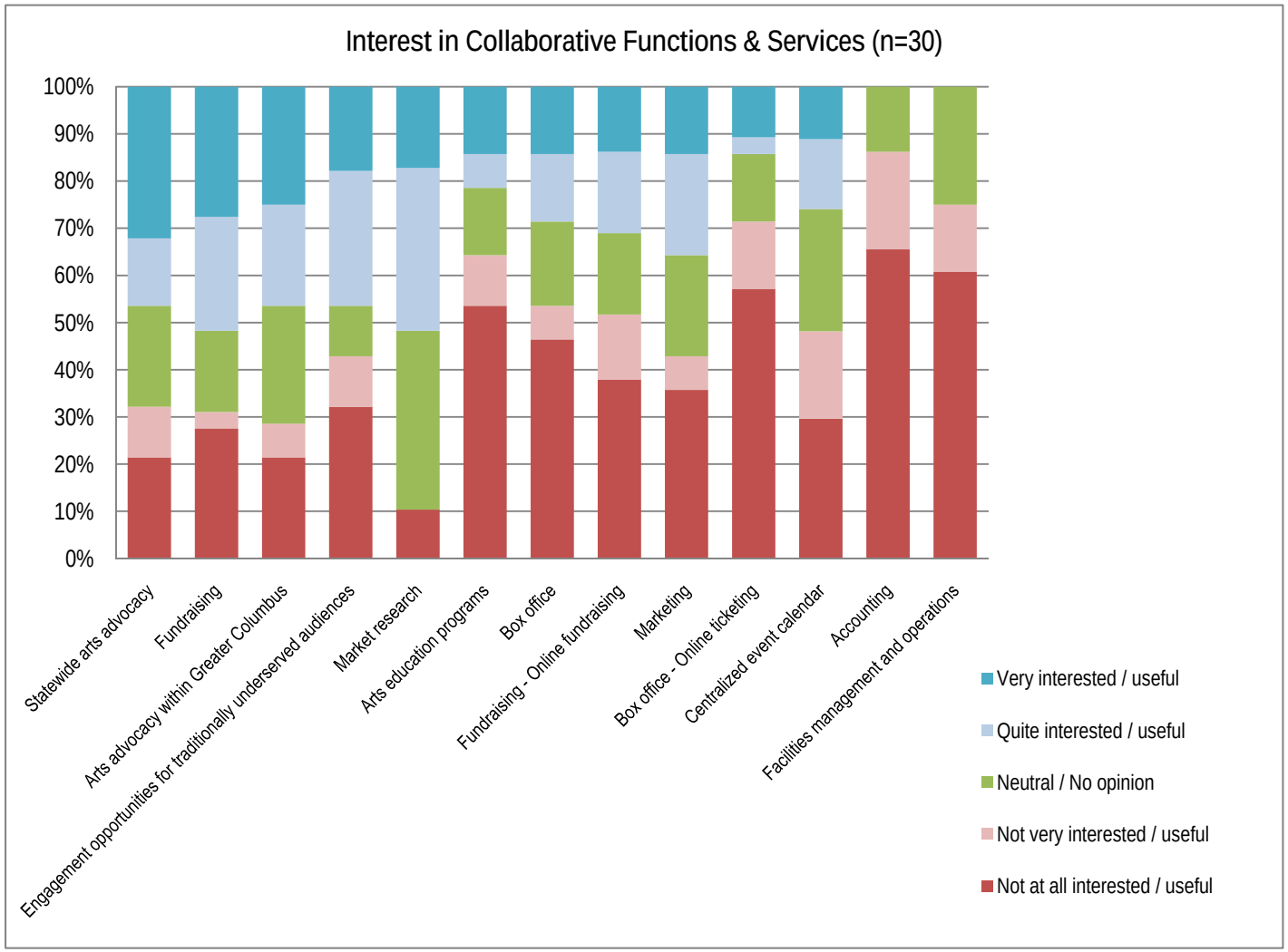

Figure 22: Interest in collaboration

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Community Capacity

In order to understand if Columbus has the capacity to move from viable to sustainable or vital, we conducted in-depth interviews with community stakeholders and cultural organization leaders, as well as examined a number of demographic and psychographic factors.

Community Psychographics

We analyzed data from a variety of sources, including the United States Census Bureau, the United States Department of Commerce Bureau of Economic Analysis, and Nielsen Claritas that describes various indicators of the arts and cultural sector.

The Simmons Lifestyle Indices are used in Nielsen Claritas's PRIZM consumer segmentation system to identify the likelihood of participation in hundreds of consumer behaviors, with a score of 100 indexed to national average likelihood of participation. We have collated those behaviors that are most related to the arts and culture sector, and Figure 23 compares Columbus to the other 14 communities, in order of the vitality index in Figure 10.

	Simmons Lifestyle Index - Interest in Arts	Simmons Lifestyle Index - Go to live theatre	Simmons Lifestyle Index - Make charitable contributions	Simmons Lifestyle Index - Belong to an arts association
Minneapolis	110	118	110	118
Indianapolis	102	104	104	97
Cleveland	103	110	99	106
Kansas City	102	105	103	100
Cincinnati	101	103	103	99
San Diego	105	108	108	107
Charlotte	100	99	105	94
Raleigh	104	104	107	98
Columbus	103	105	102	104
Nashville	96	92	101	83
Portland	92	89	98	96
Jacksonville	97	97	100	89
Austin	108	107	102	112
Louisville	97	99	100	89
Milwaukee	105	111	100	112

Figure 23: Comparison of psychographics

Minneapolis, which scored highest on the sustainability index, also scores most highly in these psychographic indices. That said, Columbus's psychographic indices are consistent to Indianapolis, Cleveland, Kansas City and Cincinnati, suggesting that the consumer propensity to participate in the arts in these communities which ranked more highly on sustainability is similar.

Figure 24 on the following page compares some key Columbus demographics to the comparable communities.

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As with the psychographic information, Minneapolis is particularly strong in all of these demographic categories. Again, there are a number of similarities between Columbus and the other vital and sustainable arts communities. In particular, Columbus has strong educational characteristics, comparable median income and, perhaps surprisingly, Columbus also has a comparable number of artists per thousand working adults.

	09 - 14 Projected pop growth	GDP / 2009 Population	2009 median income	A&C Orgs per 1 million 2009 population	Artists per Thousand Working Adults	% of population 25 and older with Bachelor's Degree
Minneapolis	5%	$60	$64,293	29.5	17.2	36.8%
Indianapolis	6%	$56	$54,174	15.0	14.3	30.2%
Cleveland	-1%	$50	$48,560	14.4	10.9	26.8%
Kansas City	5%	$50	$54,023	11.9	14.5	31.6%
Cincinnati	2%	$46	$53,142	12.1	11.9	28.2%
San Diego	6%	$55	$58,108	16.6	14.2	33.5%
Charlotte	11%	$69	$54,075	15.1	10.7	32.6%
Raleigh	14%	$49	$59,287	20.0	14.7	41.4%
Columbus	4%	$50	$53,109	14.6	13.3	32.4%
Nashville	7%	$50	$50,767	14.0	18.3	31.6%
Portland	7%	$51	$54,143	17.6	15.4	32.7%
Jacksonville	11%	$44	$50,477	9.5	10.1	25.8%
Austin	12%	$48	$55,775	16.9	18.1	38.4%
Louisville	3%	$45	$47,869	16.0	11.2	23.6%
Milwaukee	0%	$54	$53,302	19.5	14.7	30.4%

Figure 24: Market Comparison

Overcoming challenges

In order to further assess community capacity, we interviewed 35 cultural leaders and community stakeholders to both frame future conversation as well as to understand the most likely areas for future investment. They consistently noted to important challenges that need to be resolved.

Connecting to community goals

Interviewees commented that the sector needs to help the community understand the value and importance of the arts and why they merit public and private investment. In particular, interviewees acknowledged the necessity of demonstrating how the sector's activities support economic development, Columbus's "brand," and workforce development. This approach is certainly consistent with the Minneapolis Arts Commission approach to directly align their priorities with those of the city commission. Interviewees who were not leaders of arts organizations commented that the sector seems to focus on the same groups of individuals as

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participants and donors, and perhaps this focus needs to change.

Arts Crisis Fatigue

In order for the Columbus arts sector to achieve sustainability, it has to overcome a number of challenges, not the least of which is donor fatigue from constantly being asked to "save" the arts. In a lot of ways, the "arts crisis" characterization is unfair. There have been a number of organizations that have been quite successful, but their stories become "drowned out" in the press and publicity about those organizations in financial distress.

Interviewees noted that the high profile problems of a few arts organizations (in particular the symphony, the opera, and COSI) have damaged the sector as a whole in a couple of ways. The negative media coverage on these organizations has created fallout that has damaged the reputation of the rest of the arts sector. This suggests the need for a public information campaign which broadens the community's understanding of the breadth of "the arts sector." The amount of resources invested in these organizations without clear solutions in sight frustrated many interviewees. Our analyses earlier in the report documented assertions that the opera and symphony have seen greatly diminished participation and are perhaps the most fragile organizations in the sector. While other organizations have been able to maintain or increase their funding, decisions about securing the future of these two organizations have only just begun to be explored with the recently implemented consolidation of the Symphony within CAPA's administrative structure.

Donors are tired of saving organizations. They are ready to invest in organizations and to see a "return on investment" in the form of:

1. Demonstrated contributions to the quality of life in Columbus
2. Attracting business and retaining talent
3. Attracting positive attention and goodwill for the city
4. Attracting visitors to Columbus

Many individuals were also frustrated by the number of studies commissioned over the past decade, and they wanted to see action, not studies.

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Capitalizing the Arts Sector

In our interviews with cultural leaders and community stakeholders, we presented a list of WolfBrown's recommended initiatives and asked interviewees to rate the importance of each item on a scale of 1 to 10 (with 10 being the most important) as well as the likelihood in achieving each item on a scale of 1 to 10 (with 10 being the most likely). The average scores are reflected above (Figure 25).

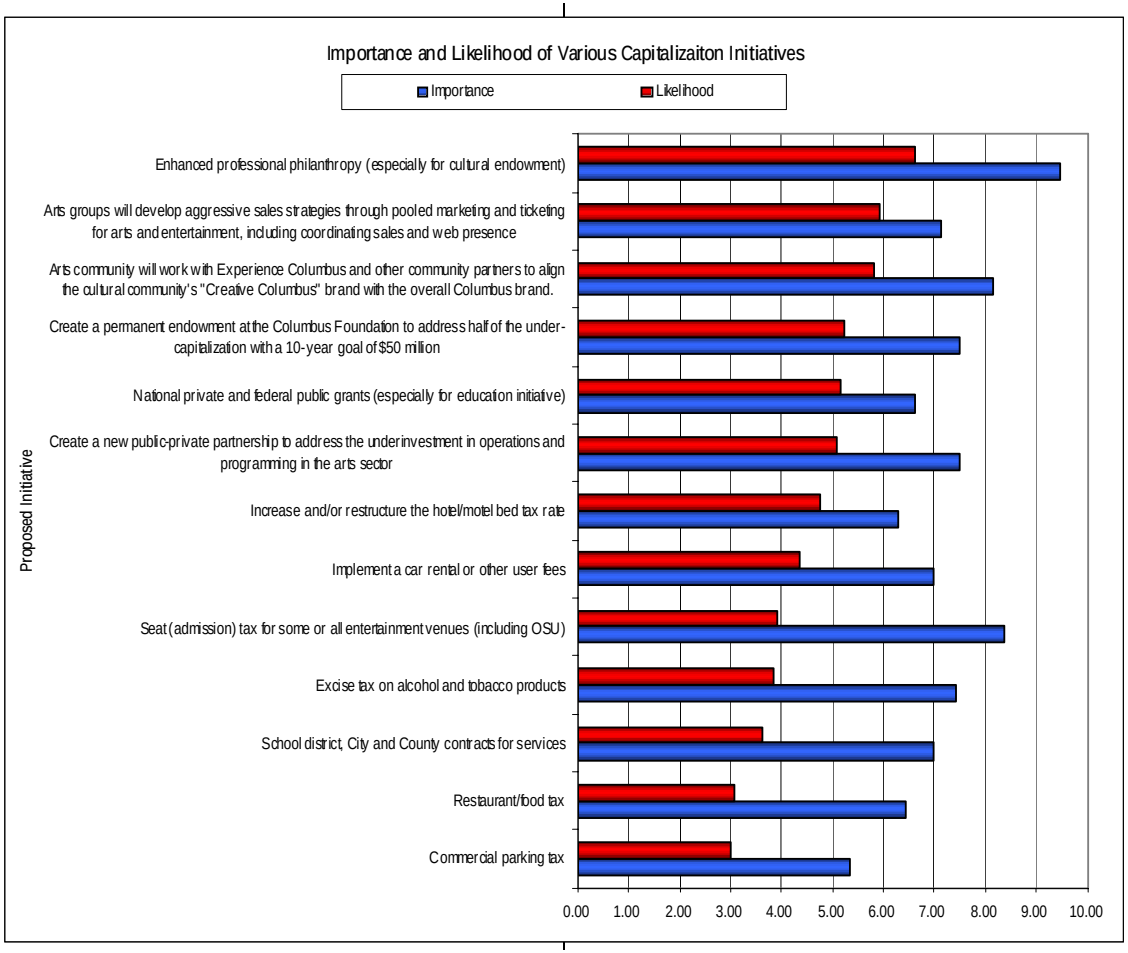

Figure 25: Feedback on the Importance and Likelihood of Proposed WolfBrown Initiatives

Private Sector Support

There was the greatest consensus around the importance and likelihood of both broadening and deepening the base of individual donors to the arts. In particular, interviewees noted that there has been a lot of focus on corporate philanthropy, but there should be at least as much emphasis on individual philanthropy.

Dedicated tax revenues

Of the proposed dedicated tax revenue streams, the seat (admission) tax rated the highest in terms of importance. Interviewees commented that this kind of tax revenue stream

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may be the most logical and most palatable to voters, and interviewees also offered that Ohio State University President Gordon Gee has publicly stated that he would be amenable to such a tax on OSU sporting events. Interviewees agreed that without OSU, this tax revenue stream would not generate meaningful revenue. As noted earlier, Cleveland has had tremendous success with a county-wide cigarette tax that is generating significant new revenues for arts and cultural organizations.

The formation of a permanent endowment did not rate as highly in terms of importance as some of the other initiatives because many interviewees felt that their organizations need operational funds, capital funds, or restoration of cash reserves which were depleted during the recession. As a result, these interviewees rated other revenue generation initiatives as more important. However, it is clear from the benchmarking and the vital communities that investment in endowment is necessary to appropriately capitalize the sector.

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The "Right" Size: Observations and Conclusions

While the Columbus arts sector seems viable as a whole, it is clearly not sustainable given the current level of resources dedicated to the sector.

The investment in the sector by consumers, donors and the public sector does not achieve the levels illustrated in the sustainable benchmark communities.

Our indicators show that while Columbus may be able to maintain current activity levels, the sector will face increasing difficulty adapting and investing in future growth. While many of the challenges that face the Columbus arts sector mirror national challenges; other communities have found effective strategies to generate resources.

Under-invested

The data demonstrates that the public and private sectors have under-invested in the city's arts and cultural sector as a function of capacity over the past ten years. The priority that the community places on the sector has clearly shifted and, as noted in the cultural plan, re-aligning the arts and culture sector with the community's goals is essential to making the case for increased support.

It is important to recognize that Columbus's large organizations face different challenges than small groups. Large organizations have seen significant attendance decline, they have essentially same buying power that they had 10 years ago and they do not have adequate capital to manage change. They are concerned about their ability to use their existing resources to maintain their current level of activity and standards of programming. Some have seen such material reductions in revenues that without new sources of revenue they may be individually unsustainable. Others have sought innovative solutions to operating more efficiently and effectively and may adapt to an era of changed circumstances. This innovation should be encouraged and rewarded.

At the same time, it is important to note that while some organizations struggle and that as whole the entire sector is under legitimate stress there are many success stories in the arts in Columbus. Leadership uniformly acknowledges that a vital arts and culture sector is a critical piece of a vital Columbus. While its composition may change, the need to generate adequate resources will remain.

Market Potential

Given our analysis of arts organization financial performance as well as the benchmarking of consumer behavior profiles

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and demographic information across the comparable markets, there appears to be similar enough potential audience to drive increased earned revenue. The key is that there are some significant organizations, most notably the symphony and opera, that have seen substantial declines in earned revenue over a 10-year period while others have emerged or grown. While local trends, especially in regards to participation, are consistent with national trends in legacy disciplines, there is ample evidence that organizations that seek to engage the community and respond to changing interest are successful.

Financial Capacity

Throughout our interviews, and as evidenced by the private sector support data, there appears to be capacity in the community for well-conceived, well executed arts and cultural activity. Continued engagement with the private sector and articulating a stronger case for public support is critical to driving the levels of investment that benchmark communities demonstrate as achievable is essential to sustainability or vitality. In addition, engaging the corporate sector in strategies that align the entire sector, rather than just individual organizations with community priorities may result in renewed support.

The three vital communities in our study – Minneapolis, Cleveland and Indianapolis – have had success over a ten year period in generating significantly increased revenues including aggregate sales per capita, aggregate public funds per capita, and / or aggregate private fundraising per capita.

A vital arts and culture sector requires constant investment to renew itself. While collaboration is, of course, critical to obtain maximum operating efficiency, the arts communities that are most vital focus on capitalizing their organizations.

Recommendations

Based on our analyses, we believe a ten-year strategy could be set in place to increase support for the sector. AMS recommends five specific strategies and courses of actions to better capitalize the sector:

1. *Invest in market research* – All of the sustainable and vital communities surpass Columbus in gross aggregate sales. Based on our analysis, an annual gain of 4% greater than inflation in earned revenue over the next ten years would bring the community to a level of sustainability consistent with our benchmark communities.

   But, before specific strategies and tactics can be developed, the arts sector must better understand, in a quantifiable way, who is coming, who is not, and why. Non-attendee research can be extremely helpful in understanding barriers to participation (price, time, convenience, quality or relevance of product, etc.). Understanding market preferences is critical to

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adapting to change. Our surveys indicated that market research was an area where arts organizations recognize significant benefits by collaborating. Our experience tells us that this is an effective strategy to building and sharing knowledge. We suggest that GCAC or CCLC, with the participation of The Columbus Foundation, the Columbus Partnership and Experience Columbus, take the lead in designing and executing an on-going market research initiative to understand the current marketplace and measure effectiveness of new strategies as they are implemented. The best practice is this area is the combined efforts of the Pittsburgh arts sector through the shared services operation of the Pittsburgh Cultural Trust.

2. *Increase public sector investment in the arts sector through both local and statewide efforts.* While many Columbus arts organizations benefit from the hotel/motel tax through re-granting by the Greater Columbus Arts Council, the level of public sector funding generated for arts organizations per capita is low when compared to the vital and sustainable communities. To achieve comparable levels of support, public sector funding, currently at approximately $11.4 million annually, should increase to $20 million per year[35] (a compound increase of 5.6% per year). Two specific strategies have emerged to achieve this outcome.

- *Advocate for an increased (additional) dedicated tax revenue stream by demonstrating the public value of the sector* – Cleveland has had tremendous success generating revenue from a cigarette tax. Another possibility is a seat admission tax, which many Columbus stakeholders felt was a relatively likely possibility to garner support, and, with OSU's participation, would generate meaningful revenue for the arts and culture sector. Additional information about other tax revenue streams are attached to this report as an appendix.

- *Advocate for a statewide dedicated tax revenue stream.* The Columbus arts and culture sector has an opportunity to work with others across the state to increase funding for the Ohio Arts Council and then to its constituent organizations. Minnesota is a particularly successful example that demonstrates a partnership with not just statewide arts and cultural organizations, but environmental groups as well. Denver SCFD tax brings together organizations from the arts to the zoo in a dedicated revenue stream that has been renewed by the voters. Other examples of regional funding are present in Pittsburgh, St. Louis and many other communities.

3. *Communicate the alignment between the arts sectors' goals and the larger goals for Central Ohio to drive*

[35] All values are before inflation

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increased public and corporate sector investment – The Minneapolis Arts Commission has worked hard to make sure that its objectives align with city government. In addition to noting this alignment in its strategic plan, it communicates with over a dozen city departments that "touch" arts and culture to make sure that the arts are at the table and that mutual benefit can accrue. In Indianapolis, the Indianapolis Cultural Development Commission is an arts, corporate, and public sector partnership that directly serves the community goals and the arts sector's needs. This kind of attention to the public sector and its greater objectives is necessary to further emphasize and enhance the public value that arts and culture generate for central Ohio.

4. *Drive increased private sector support by improving and coordinating fundraising messaging* – Private support of the arts sector, while shifting, is strong in Columbus and growth of only 6/10s of a percent each year for the next decade would put Columbus on equal footing with sustainable arts communities. Many respondents to our survey indicated that it would be useful to outsource fundraising functions, but AMS does not feel that a United Arts Fund (a central fundraising organization for all organizations, like the Fine Arts Fund in Cincinnati) would be a success in Columbus as broad participation is a key to success. We do believe that there is tremendous value in developing and communicating a more sophisticated and nuanced message about private support for the arts and the critical role of philanthropy in its success. As an example, the Fine Arts Fund in Cincinnati published a recent study entitled *The Arts Ripple Effect* which tested a number of messages about the arts to determine which ones might persuade the general public to support public funding for the arts. The concept that stood out as having the most potential was, "a thriving arts sector creates 'ripple effects' of benefits throughout our community."[36]

5. *Build An Endowment Infrastructure* – While we noted earlier that each arts organization must determine its capitalization structure based on its mission and activity, our analysis supports the conclusions of previous studies that Columbus arts organizations are "under-endowed." WolfBrown, in its report, suggested that there be a community-wide endowment campaign for $50 million. While we do not dispute the proposed size of that goal on a financial basis, in fact, analysis of the benchmarks suggest that $66 million target would be an appropriate level, there was much skepticism that a goal of that size would be achievable. In the best practice communities, we are reminded that significant endowments are most often established organization by organization either in the course of capital campaigns (such as the Guthrie

[36] The Topos Partnership for the Fine Arts Fund. "The Arts Ripple Effect: A Research-Based Strategy to Build Shared Responsibility for the Arts." January 2010. p. 3.

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Theater in Minneapolis) or through bequests (such as the Indianapolis Museum of Art). A coordinated messaging strategy about the importance of legacy giving in cooperation with The Columbus Foundation could lay the groundwork for both institutional and sector-wide endowments.

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Afterword – "The market will decide"

The Columbus arts sector is comprised of many different and varied organizations. Some have a long history in the community, some are more recent and others are emerging to meet new demands. Throughout our research, in Columbus and beyond, it is clear that entitlements and givens are no longer the order of the day for the arts and culture sector. If the Columbus market is unable to support a specific organization either through sales or philanthropy, the community has to make a deliberate decision whether the organization is still viable and relevant to Columbus. As we noted earlier, both of Cleveland's ballet companies went out of business, but dance is still presented in the community; and the sector as a whole has grown. There are other examples of major cities that do not have one or more of a type of major performing arts organization (e.g., Miami no longer has a symphony orchestra – the Cleveland Orchestra performs there). That does not mean that a particular city is culturally deficient. Instead, its arts and culture sector evolves in a way that becomes representative of its community and becomes distinct from others.

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Appendix A – Sustainability Analysis Indicators / Indices

Key Indicators - Sales

- Aggregate sales per capita – The calculation of total revenues, based on Form 990 data, divided by the total population as estimated by the U.S. Census Bureau.

City	Aggregate Sales Per Capita	Index
Minneapolis	$55	199
Milwaukee	$45	163
Cleveland	$40	143
San Diego	$32	115
Cincinnati	$31	110
Portland	$30	107
Raleigh	$28	102
Nashville	$28	101
Kansas City	$24	87
Charlotte	$22	80
Columbus	$18	66
Indianapolis	$18	64
Louisville	$16	59
Jacksonville	$16	56
Austin	$13	47

This first indicator suggests the aggregate revenues generated by Columbus's arts and culture sector is bottom group of the comparable cities. This is consistent with the documented decline in sales over the past ten years.

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- Ten year change in aggregate sales per capita – The change of aggregate sales per capita from 1998 to 2008, with 1998 adjusted for inflation using the Consumer Price Index.

City	10 Year Change in Agg Sales	Index
San Diego	$16.85	106
Cleveland	$15.18	105
Minneapolis	$12.27	104
Milwaukee	$11.05	103
Raleigh	$6.03	101
Kansas City	$5.09	101
Charlotte	$2.69	100
Portland	($0.03)	99
Nashville	($0.71)	99
Austin	($1.12)	99
Cincinnati	($1.74)	98
Jacksonville	($4.68)	97
Indianapolis	($5.81)	97
Louisville	($7.16)	96
Columbus	($9.33)	95

Columbus has experienced the greatest rate of decline of all 15 communities. Minneapolis, Cleveland and San Diego stand out for their sales per capita.

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Key Indicators - Support

- Total public support (i.e., government grants) per capita – Total public support, based on Form 990 data, divided by total population

City	Total Public Support Per Capita	Index
Minneapolis	$30.90	396
Charlotte	$10.99	141
Indianapolis	$9.10	117
Raleigh	$8.43	108
Jacksonville	$7.51	96
Cleveland	$6.47	83
Columbus	$6.39	82
Portland	$6.10	78
Milwaukee	$5.91	76
Cincinnati	$5.85	75
Austin	$4.64	59
San Diego	$4.60	59
Kansas City	$4.54	58
Nashville	$4.04	52
Louisville	$1.59	20

Public sector support per capita in Columbus is well below the average but still in the middle third of all communities studied.

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- 10 year change in public support per capita – The change of total public support per capita from 1998 to 2008, with 1998 adjusted for inflation using the Consumer Price Index.

City	10 Year Change in Public Support Per Capita	Index
Indianapolis	$4.79	147
Minneapolis	$4.21	141
Cincinnati	$2.49	124
San Diego	$1.75	117
Cleveland	$1.71	116
Kansas City	$1.64	116
Austin	$0.58	105
Nashville	-$0.02	99
Louisville	-$0.32	96
Columbus	-$1.74	81
Jacksonville	-$1.96	79
Charlotte	-$1.98	79
Portland	-$2.73	71
Milwaukee	-$2.91	70
Raleigh	-$4.04	58

Columbus's public support has not kept up with the pace of inflation, especially compared with Indianapolis, Minneapolis, and Cincinnati, all of which have increased their public support per capita in a meaningful way.

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- Total private support (i.e., all other contributions) per capita – All other support (i.e., non-government support) divided by the total population.

City	Total Private Support Per Capita	Index
Austin	$24.69	62
Charlotte	$39.99	101
Cincinnati	$34.86	88
Cleveland	$71.80	182
Columbus	$35.80	91
Indianapolis	$48.08	122
Jacksonville	$20.89	53
Kansas City	$41.30	105
Louisville	$26.08	66
Milwaukee	$40.47	102
Minneapolis	$82.28	208
Nashville	$40.67	103
Portland	$34.27	87
Raleigh	$22.71	57
San Diego	$28.76	73

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- Ten year change in private support per capita – The change in private support for 1998 to 2008, adjusted for inflation using the Consumer Price Index.

City	10 Year change in Private Support Per Capita	Index
Cleveland	$35.05	161
Nashville	$10.86	118
Columbus	$10.21	117
San Diego	$10.14	117
Charlotte	$8.80	115
Jacksonville	$7.09	112
Kansas City	$2.50	103
Austin	$2.00	103
Minneapolis	-$0.60	98
Cincinnati	-$2.20	95
Raleigh	-$6.39	88
Portland	-$8.05	85
Indianapolis	-$11.91	78
Milwaukee	-$25.97	53
Louisville	-$40.03	28

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- Average building, land and equipment value after depreciation – Aggregate value of building, land and equipment based on Form 990 data.

City	Average Building, Land and Equipment	Index
Kansas City	$19,046,262	278
Cleveland	$13,426,124	196
Indianapolis	$12,788,023	187
Nashville	$10,007,261	146
Cincinnati	$7,908,148	115
Minneapolis	$7,487,454	109
Milwaukee	$7,373,399	108
Portland	$3,955,637	58
Louisville	$3,802,538	56
San Diego	$3,694,332	54
Jacksonville	$3,541,184	52
Columbus	$2,698,311	39
Austin	$2,667,757	39
Raleigh	$2,485,921	36
Charlotte	$1,855,405	27

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- Aggregate working capital – Aggregate unrestricted net assets minus depreciated building, land and equipment, based on Form 990 data.

City	Aggregate Working Capital	Index
Indianapolis	$ 526,127,909	663
Minneapolis	$ 285,169,465	359
Louisville	$ 124,203,900	157
Raleigh	$ 115,877,539	146
Cleveland	$ 111,547,356	141
San Diego	$ 74,971,048	94
Cincinnati	$ 59,029,388	74
Kansas City	$ 33,176,198	42
Charlotte	$ 29,934,566	38
Columbus	$ 23,366,294	29
Jacksonville	$ 3,273,939	4
Portland	$ 360,061	0
Austin	$ 226,697	0
Nashville	$ (55,040,228)	-69
Milwaukee	$ (142,106,979)	-179

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- Aggregate endowment value – Aggregate permanently restricted net assets, based on Form 990 data

City	Aggregate Endowment	Index
Cleveland	$603,751,831	412
Minneapolis	$554,235,538	378
Cincinnati	$185,777,725	127
Indianapolis	$156,532,397	107
San Diego	$128,141,866	87
Charlotte	$113,155,334	77
Kansas City	$108,708,931	74
Columbus	$80,840,168	55
Portland	$63,797,296	44
Milwaukee	$57,175,463	39
Raleigh	$52,342,902	36
Louisville	$34,972,588	24
Jacksonville	$31,822,870	22
Austin	$14,058,845	10
Nashville	$12,914,326	9

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- Total venue seats per 1,000 individuals – Total number of all arts, culture and entertainment seats per 1,000 individuals.

City	Venue Seats per 1,000 Population	Index
Indianapolis	330	275
Louisville	168	140
Columbus	164	136
Kansas City	130	108
Charlotte	124	103
Cincinnati	123	102
Nashville	114	95
Austin	100	84
Milwaukee	98	82
Cleveland	94	79
San Diego	84	70
Raleigh	80	67
Jacksonville	80	66
Portland	69	57
Minneapolis	44	37

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- Average budget size of arts and cultural organizations – the average expense budget of arts and cultural organizations, based on Form 990 data

City	Average Size of Arts & Cultural Organization	Index
Cleveland	$7,881,653	156
Cincinnati	$6,674,718	132
Kansas City	$6,571,501	130
Raleigh	$6,486,523	128
Indianapolis	$6,009,068	119
Minneapolis	$5,872,278	116
Nashville	$5,648,187	112
Milwaukee	$4,830,460	96
Charlotte	$4,306,944	85
Jacksonville	$4,220,739	83
San Diego	$4,053,826	80
Portland	$4,043,258	80
Columbus	$3,976,535	79
Louisville	$3,054,239	60
Austin	$2,209,367	44

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- PRIZM consumer behavior index[37] – Likelihood of individuals to belong to an arts association, based on the Simmons Mediamark consumer behavior index

City	Index
Austin	112
Charlotte	94
Cincinnati	99
Cleveland	106
Columbus	104
Indianapolis	97
Jacksonville	89
Kansas City	100
Louisville	89
Milwaukee	112
Minneapolis	118
Nashville	83
Portland	96
Raleigh	98
San Diego	107

[37] $PRIZM_{NE}$ classifies each household into one of 66 consumer profiles which are effective at estimating demographic information as well as psychographic consumer behaviors. Consumer behavior indices for a given geography are created by analyzing the number and type of consumer segments within a particular geography, and then a "blended" index for the entire geographic area (e.g., zip code, core based statistical area) is determined.

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- Median artist wage versus all median wages – The ratio of the median artist wage compared against all wages, based on Bureau of Labor Statistics data

City	Ratio of Artist Wages to All Wages	Index
Austin	31%	162
Jacksonville	29%	148
San Diego	25%	130
Kansas City	25%	128
Columbus	24%	125
Portland	22%	116
Cincinnati	20%	103
Charlotte	19%	98
Minneapolis	18%	94
Raleigh	18%	93
Milwaukee	14%	75
Cleveland	14%	74
Nashville	13%	67
Indianapolis	10%	54
Louisville	6%	32

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Appendix B – Research Digest: National Context and Trends

Nationally, the arts and culture sector faces unprecedented challenges, not the least of which is declining attendance and participation. The National Endowment of the Art's *2008 Survey of Public Participation in the Arts* documents the depth of the decline over a 26-year period as shown in the table below.

Activity	Percent of adults attending / visiting / reading			
	1982	1992	2002	2008
Jazz*	9.6%	10.6%	10.8%	7.8%
Classical music*	13.0%	12.5%	11.6%	9.3%
Opera*	3.0%	3.3%	3.2%	2.1%
Latin music	N/A	N/A	N/A	4.9%
Performing arts festivals	N/A	N/A	N/A	20.8%
Musical plays*	18.6%	17.4%	17.1%	16.7%
Non-musical plays*	11.9%	13.5%	12.3%	9.4%
Ballet*	4.2%	4.7%	3.9%	2.9%
Other dance	N/A	7.1%	6.3%	5.2%
Art museums / galleries*	22.1%	26.7%	26.5%	22.7%
Art / craft fairs and festivals	39.0%	40.7%	33.4%	24.5%
Parks / monuments / historic buildings / neighborhoods	37.0%	345.0%	31.6%	24.9%
Plays / poetry / novels / short stories	56.9%	54.0%	46.7%	50.2%
Benchmark activities (denoted with a *)	39.0%	41.0%	39.4%	34.6%

Percentage of adults that participate in various arts activities[38]

Nearly every type of arts participation is on the decline, with two notable exceptions. Museum and gallery attendance grew in 1992 and 2002. While there has been a decline in attendance since 2002, current participation is comparable to 1982. Reading literature (plays, poetry, novels or short stories) had been on decline through 2002, but there has been a meaningful increase in this activity in 2008. Of particular note is the national decline in many of the key performing arts activities (classical music, opera, ballet and non-musical plays) down by as much as 30%.

[38] National Endowment for the Arts. *2008 Survey of Public Participation in the Arts*. Washington, DC: November 2009. p. 3.

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Conversely, museums experienced a rebound in attendance since the NEA administered its survey. In 2009, 57.4% of museums had an increase in attendance, with only 31.2% reporting a decrease in attendance.[39]

Each artistic field is addressing this issue differently. For example, museums have re-positioned themselves and utilized more aggressive marketing to local audiences, and in part have leveraged the "staycation" phenomenon and its relative bargain pricing to its advantage.[40] Along the same lines, non-profit theatres have revised ticket pricing options to entice people to attend the theatre while staying closer to home.[41]

Changing demographics, in particular aging and more culturally diverse audiences are an important trend affecting all artistic disciplines nationally. The NEA's *2008 Survey of Public Participation in the Arts* demonstrates that older individuals make up a greater percentage of performing arts audiences.[42] In addition, with the exception of Latin music, performing arts attendees are predominantly white.[43] Artistic disciplines are responding to these changes in various ways: The Association of American Museums has created the Center for the Future of Museums to foster creativity and spark discussion about responding to these changes. In regards to demographic changes, the Center for the Future of Museums has developed a vision in which:

> "More museums will be places of cultural exchange in their communities; they won't have any other choice. Museums will be primary sites for civic dialogues about community interests and the policies that affect communities. They will be one of the most powerful agents in helping all children understand the future and ensuring they are prepared to take leadership roles in various sectors."[44]

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[39] Katz, Philip M. "Service Despite Stress: Museum Attendance and Funding in a Year of Recession." The American Association of Museums. Washington, DC: February 2010. p. 5.
[40] Ibid. p. 2.
[41] Neighbors, Martha. "The New Normal: Executive Summary of TCG Board 'Phone Tree' Discussions." Theatre Communications Group. New York: February 2009.
[42] National Endowment for the Arts. *2008 Survey of Public Participation in the Arts*. Washington, DC: November 2009. p. 20.
[43] Ibid. p. 21.
[44] Center for the Future of Museums. "Museums & Society 2034: Trends and Potential Futures." December 2008.

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The revised marketing strategy highlighted above springs from this vision. The League of American Orchestras has commissioned nationwide studies on classical music participation and trends in order to respond to the changing profile of the classical music patron. In particular, its studies have shown that the Latino population will increase their share of the classical music audience from 12% to 20% by 2018.[45] In addition, its studies have also shown that orchestras are actually successful at attracting newcomers, but are not effectively converting them to long-term customers and supporters. This retention is not only needed for a stable audience base, but the increased value of a core audience member versus an "unconverted trialist" is significant – the former generates an average of $4,896 over a five-year period versus $199 for the latter.[46]

National Arts Giving

National giving to the arts, culture and humanities equaled $12.4 billion, or 4% of all philanthropy nationwide in 2009.[47] Of the ten giving categories tracked by *Giving USA 2010*, arts, culture and the humanities ranked in seventh place, as it has for over 10 years.[48] Over recent years, arts, culture and humanities organizations have experienced repeated decreases in contributions. Most notably, arts, culture and humanities organizations saw a drop of 10.1% in 2008, which tied with health organizations as the largest relative drop.[49] From 2007 – 2009, national funding for arts, culture and the humanities has dropped by 11.9%.

The Center on Philanthropy at Indiana University offers useful observations on the profile of the typical arts donor. Arts donors make up 8% of all households nationwide, and are the most likely to support a number of secular causes.[50] In addition, there are attributes which are statistically significant in determining whether a household will give to the arts:

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[45] See League of American Orchestras. "Audience Demographic Research Review." December 10, 2009.
[46] Oliver Wyman. "Churn Revisited: Is Anyone Making Butter Yet?" League of American Orchestra Conference Presentation. June 11, 2009.
[47] The Center on Philanthropy at Indiana University. *Giving USA 2010: The Annual Report on Philanthropy for the Year 2009*. Giving USA Foundation. Indianapolis: 2010. p. 9.
[48] Ibid. p. 9.
[49] Ibid. p. 16.
[50] The Center on Philanthropy at Indiana University. "Charitable Giving to Education, Health and Arts: An Analysis of Data Collected in the Center on Philanthropy Panel Study, 2003." Indianapolis: April, 2006. p.3.

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- Gives to other subsectors
- Income
- Wealth without home equity
- College and/or post-graduate degree
- Lives in a metropolitan community
- Volunteers[51]

In addition, the study identified with statistical significance that households with children are less likely to make contributions to arts organizations.

State Arts Agencies

Funding from state arts agencies, while not a substantial investment on an individual organizational level, makes an important aggregate investment in the arts sector. Therefore, an examination of national trends in state arts agency funding is important.

State funding is historically the most volatile aspect of public funding for the arts. A 15-year trend analysis shows that, adjusted for inflation, state arts funding nationally is now comparable to 1985 levels, falling short of its peak in 2001.[52]

The National Assembly of State Arts Agencies, in its annual review, ranks each state's investment in the arts on a per capita basis. For 2010 (which considers the most recent round of budget reductions), Ohio ranks 31st in total legislative appropriation per capita ($0.57 per person), and 41st in total agency revenue per person ($0.69 per person).[53] These amounts exclude the American Recovery and Reinvestment Act funds, $353,400 of which went to Ohio arts organizations.[54]

[51] Ibid. p. 5.
[52] Han, Angela. "Public Funding for the Arts: 2009 Update." *GIAreader*. Vol. 20 No. 2. Grantmakers in the Arts. Summer 2009.p. 7.
[53] National Assembly of State Arts Agencies. "State Arts Agency Funding and Grant Making: State Arts Agency Overview." p. 4.
[54] Ibid. p. 6.

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Appendix C – Arts and Cultural Organizations by Core Based Statistical Areas (Budgets Greater Than $500,000)[55]

AMERICAN INSTITUTE FOR ROMAN CULTURE INC	AUSTIN	TX
ARTHOUSE AT THE JONES CENTER	AUSTIN	TX
AUSTIN CHILDRENS MUSEUM	AUSTIN	TX
AUSTIN FILM FESTIVAL INC AUSTIN HEART OF FILM FESTIVAL	AUSTIN	TX
AUSTIN FILM SOCIETY	AUSTIN	TX
AUSTIN LYRIC OPERA	AUSTIN	TX
AUSTIN MUSEUM OF ART INC	AUSTIN	TX
AUSTIN PLAYHOUSE	AUSTIN	TX
AUSTIN SCOTTISH RITE COMMUNITY AND CHILDRENS THEATER INC	AUSTIN	TX
AUSTIN STEAM TRAIN ASSOCIATION INCORPORATED	CEDAR PARK	TX
AUSTIN SYMPHONY ORCHESTRA SOCIETY	AUSTIN	TX
AUSTIN THEATRE ALLIANCE	AUSTIN	TX
BALLET AUSTIN INCORPORATED	AUSTIN	TX
CAPITAL OF TEXAS PUBLIC TELECOMMUNICATIONS COUNCIL	AUSTIN	TX
CAPITOL BROADCASTING ASSOCIATION INC	AUSTIN	TX
CONSPIRARE INC	AUSTIN	TX
FRONT STEPS INC	AUSTIN	TX
GEORGETOWN PALACE THEATRE INC	GEORGETOWN	TX
GREATER AUSTIN PERFORMING ARTS CENTER	AUSTIN	TX
HUMANITIES TEXAS	AUSTIN	TX

[55] Data provided by the National Center for Charitable Statistics, Urban Institute, Washington, DC

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KATHERINE ANNE PORTER SCHOOL	WIMBERLEY	TX
MAPPING YOUR FUTURE INC	ROUND ROCK	TX
MEXIC-ARTE	AUSTIN	TX
ONE WORLD	AUSTIN	TX
PUBLIC ACCESS COMMUNITY TELEVISION	AUSTIN	TX
TEXAS BOOK FESTIVAL	AUSTIN	TX
TEXAS CULTURAL TRUST COUNCILS	AUSTIN	TX
TEXAS HIGHWAY PATROL MUSEUM	AUSTIN	TX
TEXAS STATE HISTORY MUSEUM FOUNDATION	AUSTIN	TX
THE TEXAS DEMOCRACY FOUNDATION	AUSTIN	TX
THEATRE ACTION PROJECT	AUSTIN	TX
UNIVERSITY OF TEXAS FINE ARTS FOUNDATION	AUSTIN	TX
VISIONS IN RHYTHM	AUSTIN	TX
ZACHARY SCOTT THEATER CENTER	AUSTIN	TX
ACTORS THEATRE OF CHARLOTTE	CHARLOTTE	NC
AFRO-AMERICAN CULTURAL CENTER INC	CHARLOTTE	NC
ANOTHER CHOICE FOR BLACK CHILDREN INC	CHARLOTTE	NC
ARTS & SCIENCE COUNCIL CHARLOTTE MECKLENBURG INC	CHARLOTTE	NC
CAROLINA CROWN INC	FORT MILL	SC
CHARLOTTE ARTSFEST INC	CHARLOTTE	NC
CHARLOTTE MUSEUM OF HISTORY INC	CHARLOTTE	NC
CHARLOTTE SYMPHONY ORCHESTRA SOCIETY INC	CHARLOTTE	NC
CHILDRENS THEATRE OF CHARLOTTE INC	CHARLOTTE	NC
COMMUNITY SCHOOL OF THE ARTS	CHARLOTTE	NC
CULTURAL AND HERITAGE COMMISSION OF YORK COUNTY	ROCK HILL	SC
DISCOVERY PLACE INC	CHARLOTTE	NC
FOUNDATION FOR THE MINT MUSEUMS	CHARLOTTE	NC
LATTA PLACE INC	HUNTERSVILLE	NC
LIGHT FACTORY	CHARLOTTE	NC

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MCCOLL CENTER FOR VISUAL ART	CHARLOTTE	NC
MILLENNIUM WATER ALLIANCE	FORT MILL	SC
MINT MUSEUM OF ART INC	CHARLOTTE	NC
MUSEUM OF THE NEW SOUTH INC	CHARLOTTE	NC
NARROWAY PRODUCTIONS INC	FORT MILL	SC
NORTH CAROLINA DANCE THEATRE	CHARLOTTE	NC
NORTH CAROLINA PERFORMING ARTS CENTER AT CHARLOTTE FOUNDATION	CHARLOTTE	NC
NORTH CAROLINA TRANSPORTATION MUSEUM FOUNDATION	SPENCER	NC
OPERA CAROLINA	CHARLOTTE	NC
THE LYNNWOOD FOUNDATION	CHARLOTTE	NC
TRUSTEES OF THE SCHIELE MUSEUM INC	GASTONIA	NC
UNIVERSITY RADIO FOUNDATION INC	CHARLOTTE	NC
WTVI	CHARLOTTE	NC
ART OPPORTUNITIES INC	CINCINNATI	OH
BEHRINGER-CRAWFORD MUSEUM BOARD OF TRUSTEES DEVOU PARK	COVINGTON	KY
CHILDRENS CHOIR OF GREATER CINCINNATI DBA CINCINNATI CHILDRENS CHOIR	MASON	OH
CHILDRENS THEATRE	CINCINNATI	OH
CINCINNATI ARTS ASSOCIATION CINCINNATI MUSIC HALL ASSOCIATION	CINCINNATI	OH
CINCINNATI BALLET COMPANY INC	CINCINNATI	OH
CINCINNATI BASEBALL MUSEUM	CINCINNATI	OH
CINCINNATI CHAMBER ORCHESTRA INC	CINCINNATI	OH
CINCINNATI INSTITUTE OF FINE ARTS	CINCINNATI	OH
CINCINNATI LANDMARK PRODUCTIONS	CINCINNATI	OH
CINCINNATI MUSEUM ASSOCIATION	CINCINNATI	OH
CINCINNATI MUSEUM CENTER FOR NATURAL AND CULTURAL HISTORY	CINCINNATI	OH
CINCINNATI MUSICAL FESTIVAL ASSOC	CINCINNATI	OH
CINCINNATI OPERA ASSOCIATION	CINCINNATI	OH
CINCINNATI PLAYHOUSE IN THE PARK	CINCINNATI	OH
CINCINNATI SHAKESPEARE FESTIVAL	CINCINNATI	OH

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CINCINNATI SYMPHONY ORCHESTRA	CINCINNATI	OH
CONTEMPORARY ARTS CENTER	CINCINNATI	OH
ENSEMBLE THEATRE OF CINCINNATI	CINCINNATI	OH
FRIENDS OF THE SCHOOL FOR CREATIVE AND PERFORMING ARTS	CINCINNATI	OH
GERMANIA SOCIETY	CINCINNATI	OH
GREATER CINCINNATI ARTS & EDUCATION CENTER	CINCINNATI	OH
GREATER CINCINNATI TALL STACKS FESTIVAL	CINCINNATI	OH
GREATER CINCINNATI TELEVISION EDUCATIONAL FOUNDATION	CINCINNATI	OH
HISTORIC SOUTHWEST OHIO INC	CINCINNATI	OH
JAPANESE LANGUAGE SCHOOL OF GREATER CINCINNATI	HIGHLAND HEIGHTS	KY
KNOW THEATRE TRIBE INC	CINCINNATI	OH
MADCAP PRODUCTIONS	CINCINNATI	OH
MEDIA BRIDGES CINCINNATI INC	CINCINNATI	OH
NATIONAL UNDERGROUND RAILROAD FREEDOM CENTER INC	CINCINNATI	OH
NORTHERN KENTUCKY SYMPHONY INC	NEWPORT	KY
PLUM STREET TEMPLE HISTORIC PRESERVATION FUND	CINCINNATI	OH
PRICE HILL WILL	CINCINNATI	OH
SHADOW NEWPORT INC	NEWPORT	KY
STARLING PROJECT FOUNDATION INC	CINCINNATI	OH
TAFT MUSEUM OF ART	CINCINNATI	OH
THE CARNEGIE VISUAL & PERFORMING ARTS CENTER INC	COVINGTON	KY
THE WYOMING FINE ARTS CENTER	CINCINNATI	OH
TRI-STATE EDUCATION AND TECHNOLOGY FOUNDATION	NORWOOD	OH
TRI-STATE WARBIRD MUSEUM	BATAVIA	OH
APOLLOS FIRE / THE CLEVELAND BAROQUE ORCHESTRA	CLEVELAND HTS	OH
ARTS ACADEMY	LORAIN	OH
ARTS ACADEMY WEST	CLEVELAND	OH
ASHTABULA ARTS CENTER	ASHTABULA	OH
BECK CENTER FOR THE CULTURAL ARTS	LAKEWOOD	OH

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CLEVELAND FESTIVAL OF ART AND TECHNOLOGY INC	CLEVELAND	OH
CLEVELAND INTERNATIONAL FILM FESTIVAL INC	CLEVELAND	OH
CLEVELAND MUSEUM OF ART	CLEVELAND	OH
CLEVELAND MUSEUM OF NATURAL HISTORY	CLEVELAND	OH
CLEVELAND MUSIC SCHOOL SETTLEMENT	CLEVELAND	OH
CLEVELAND PLAY HOUSE	CLEVELAND	OH
CLEVELAND POPS ORCHESTRA	BEACHWOOD	OH
CLEVELAND PUBLIC ART INC	CLEVELAND	OH
CLEVELAND PUBLIC THEATRE INC	CLEVELAND	OH
CLEVELAND RESTORATION SOCIETY INC	CLEVELAND	OH
DONAUSCHWABENS GERMAN AMERICAN CULTURAL CENTER INC	OLMSTED TOWNSHIP	OH
FAIRMOUNT CENTER FOR CREATIVE & PERFORMING ARTS INC	NOVELTY	OH
GREAT LAKES MUSEUM OF SCIENCE ENVIRONMENT AND TECHNOLOGY	CLEVELAND	OH
GREAT LAKES THEATER FESTIVAL INC	CLEVELAND	OH
HARBOR HERITAGE SOCIETY	CLEVELAND	OH
IDEASTREAM	CLEVELAND	OH
INTERMUSEUM CONSERVATION ASSOCIATION	CLEVELAND	OH
CENTER LAKE ERIE NATURE AND SCIENCE CENTER	BAY VILLAGE	OH
LAKEVIEW CEMETERY FOUNDATION	CLEVELAND	OH
LORAIN CIVIC CENTER COMMITTEE INC	LORAIN	OH
MALTZ MUSEUM OF JEWISH HERITAGE	CLEVELAND	OH
MARY FOUNDATION	ROCKY RIVER	OH
MUSEUM OF CONTEMPORARY ART CLEVELAND	CLEVELAND	OH
NEAR WEST THEATRE	CLEVELAND	OH
OBERLIN CHORISTERS	OBERLIN	OH
OHIO & ERIE CANAL ASSOCIATION	CLEVELAND	OH
OPERA CLEVELAND	CLEVELAND	OH
PIANO INTERNATIONAL ASSOCIATION OF NORTHERN OHIO	CLEVELAND	OH
PLAYHOUSE SQUARE FOUNDATION	CLEVELAND	OH
RAINEY INSTITUTE	CLEVELAND	OH

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RED-AN ORCHESTRA	CLEVELAND	OH
ROCK AND ROLL HALL OF FAME AND MUSEUM INC	CLEVELAND	OH
SPACES	CLEVELAND	OH
THE CHILDRENS MUSEUM OF CLEVELAND	CLEVELAND	OH
THE MUSICAL ARTS ASSOCIATION	CLEVELAND	OH
VILLAGE TELEVISION GROUP	CLEVELAND	OH
WESTERN RESERVE HISTORICAL SOCIETY	CLEVELAND	OH
YOUNG AUDIENCES OF NORTHEAST OHIO INC	CLEVELAND	OH
AMERICAN CERAMIC SOCIETY INC	WESTERVILLE	OH
AMERICAN FOLKLORE SOCIETY INC	COLUMBUS	OH
AMERICAN MOTORCYCLE HERITAGE FOUNDATION	PICKERINGTON	OH
BALLET METROPOLITAN INC	COLUMBUS	OH
CAPITAL REGIMENT DRUM AND BUGLE CORPS	COLUMBUS	OH
COLUMBUS ASSOCIATION FOR THE PERFORMING ARTS INC	COLUMBUS	OH
COLUMBUS CHILDRENS THEATRE	COLUMBUS	OH
COLUMBUS HUMANITIES ARTS AND TECHNOLOGY ACADEMY	COLUMBUS	OH
COLUMBUS JAPANESE LANGUAGE SCHOOL	WORTHINGTON	OH
COLUMBUS MUSEUM OF ART	COLUMBUS	OH
COLUMBUS SYMPHONY ORCHESTRA INC	COLUMBUS	OH
COMMUNITY ARTS PROJECT INC / KING ARTS COMPLEX	COLUMBUS	OH
CONTEMPORARY AMERICAN THEATRE COMPANY	COLUMBUS	OH
DUBLIN ARTS COUNCIL	DUBLIN	OH
FRANKLIN COUNTY HISTORICAL SOCIETY	COLUMBUS	OH
GREATER COLUMBUS ARTS COUNCIL INC	COLUMBUS	OH
INSTRUCTIONAL TECHNOLOGY SERVICES OF CENTRAL OHIO INC	WESTERVILLE	OH
JAZZ ARTS GROUP OF COLUMBUS	COLUMBUS	OH
JEANNE B MCCOY COMMUNITY CENTER FOR THE ARTS CORPORATION	NEW ALBANY	OH
KARAMU HOUSE UNITED WAY SERVICES	CLEVELAND	OH
MARKETING EDUCATION RESOURCE CENTER	COLUMBUS	OH

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NEWARK MIDLAND THEATRE ASSOCIATION	NEWARK	OH
NEWARK SPORT AND EVENT COMMISSION	NEWARK	OH
OHIO ACADEMY OF SCIENCE	COLUMBUS	OH
OHIO HISTORICAL SOCIETY	COLUMBUS	OH
OHIO HUMANITIES COUNCIL	COLUMBUS	OH
OPERA ASSOCIATION OF CENTRAL OHIO / OPERA COLUMBUS	COLUMBUS	OH
OUR OHIO COMMUNICATIONS INC	COLUMBUS	OH
P A S T FOUNDATION	COLUMBUS	OH
PHOENIX THEATRE CIRCLE	COLUMBUS	OH
SHADOART PRODUCTIONS INC	COLUMBUS	OH
THURBER HOUSE INC	COLUMBUS	OH
YOUTH OVER US INC	QUAKER CITY	OH
AMERICAN CABARET THEATRE INC	INDIANAPOLIS	IN
ARTS COUNCIL OF INDIANAPOLIS INC	INDIANAPOLIS	IN
ATHENAEUM FOUNDATION INC	INDIANAPOLIS	IN
BOOTH TARKINGTON CIVIC THEATRE OF INDIANAPOLIS INC	INDIANAPOLIS	IN
CATHEDRAL ARTS INC INTERNATIONAL	INDIANAPOLIS	IN
CHILDRENS MUSEUM OF INDIANAPOLIS INCORPORATED	INDIANAPOLIS	IN
CONNER PRAIRIE FOUNDATION INC	FISHERS	IN
CONNER PRAIRIE MUSEUM INC	FISHERS	IN
CROWN HILL HERITAGE FOUNDATION INC	INDIANAPOLIS	IN
DANCE KALEIDOSCOPE INC / CLOWES MEMORIAL HALL	INDIANAPOLIS	IN
DRUM CORPS INTERNATIONAL INC	INDIANAPOLIS	IN
EITELJORG MUSEUM OF AMERICAN INDIAN AND WESTERN ART INC	INDIANAPOLIS	IN
FINE ARTS SOCIETY OF INDIANAPOLIS	INDIANAPOLIS	IN
HARRISON CENTER FOR THE ARTS INC	INDIANAPOLIS	IN
HEARTLAND TRULY MOVING PICTURES INC	INDIANAPOLIS	IN
HISTORIC LANDMARKS FOUNDATION OF INDIANA INC	INDIANAPOLIS	IN
HOOSIER BROADCASTING CORPORATION	INDIANAPOLIS	IN

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INDIANA HISTORICAL SOCIETY	INDIANAPOLIS	IN
INDIANA HUMANITIES COUNCIL INC	INDIANAPOLIS	IN
INDIANA LATINO INSTITUTE INC	INDIANAPOLIS	IN
INDIANA OPERA SOCIETY INC	INDIANAPOLIS	IN
INDIANA REPERTORY THEATRE INC	INDIANAPOLIS	IN
INDIANA STATE SCHOOL MUSIC ASSOCIATION INC	INDIANAPOLIS	IN
INDIANA SYMPHONY SOCIETY INC	INDIANAPOLIS	IN
INDIANA TRANSPORTATION MUSEUM INC	NOBLESVILLE	IN
INDIANAPOLIS ART CENTER INC	INDIANAPOLIS	IN
INDIANAPOLIS CHAMBER ORCHESTRA INC	INDIANAPOLIS	IN
INDIANAPOLIS MUSEUM OF ART INC	INDIANAPOLIS	IN
INDIANAPOLIS SCOTTISH RITE CATHEDRAL FOUNDATION INC	INDIANAPOLIS	IN
MADAME WALKER URBAN LIFE CENTER INC	INDIANAPOLIS	IN
METROPOLITAN INDIANAPOLIS PUBLIC BROADCASTING INC	INDIANAPOLIS	IN
NATIONAL INTERSCHOLASTIC ATHLETIC ADMINISTRATORS ASSOCIATION	INDIANAPOLIS	IN
PARAMOUNT HERITAGE FOUNDATION INC	ANDERSON	IN
PERCUSSIVE ARTS SOCIETY INC	INDIANAPOLIS	IN
PHOENIX THEATRE INC	INDIANAPOLIS	IN
VSA ARTS OF INDIANA INC	INDPLS	IN
YOUNG AUDIENCES OF INDIANA INC	INDIANAPOLIS	IN
CULTURAL CENTER AT PONTE VEDRA BEACH INC	PONTE VEDRA	FL
CULTURAL COUNCIL OF GREATER JACKSONVILLE INC	JACKSONVILLE	FL
DEETTE HOLDEN CUMMER MUSEUM FOUNDATION INC	JACKSONVILLE	FL
FLORIDA STATE COLLEGE FOUNDATION INC	JACKSONVILLE	FL
JACKSONVILLE SYMPHONY ASSOCIATION	JACKSONVILLE	FL
LIGHTNER MUSEUM OF HOBBIES	ST AUGUSTINE	FL
MUSEUM OF CONTEMPORARY ART JACKSONVILLE INC	JACKSONVILLE	FL
MUSEUM OF SCIENCE & HISTORY OF JACKSONVILLE INC	JACKSONVILLE	FL
POTTERS HOUSE CHRISTIAN	JACKSONVILLE	FL

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PROFESSIONAL DEVELOPMENT RESOURCES INC	JACKSONVILLE	FL
RALPH H & ELIZABETH C NORTON PHILANTHROPIC TRUST	JACKSONVILLE	FL
SAINT AUGUSTINE LIGHTHOUSE AND MUSEUM INC	ST AUGUSTINE	FL
ST JOHNS COUNTY CULTURAL COUNCIL INC	ST AUGUSTINE	FL
THE FLORIDA THEATRE PERFORMING ARTS	JACKSONVILLE	FL
WJCT INC	JACKSONVILLE	FL
AGRICULTURAL HALL OF FAME	BONNER SPRNGS	KS
AMERICAN INSTITUTE OF MUSICAL STUDIES	KANSAS CITY	MO
AMERICAN JAZZ MUSEUM	KANSAS CITY	MO
AMERICAN TRUCK HISTORICAL SOCIETY	KANSAS CITY	MO
ANNALS OF FAMILY MEDICINE INC	LEAWOOD	KS
BROOKSIDE IRISH FEST INC	KANSAS CITY	MO
COTERIE INC	KANSAS CITY	MO
CULTURE HOUSE	OLATHE	KS
FRIENDS OF CHAMBER MUSIC	KANSAS CITY	MO
HEART OF AMERICA SHAKESPEARE FESTIVAL	KANSAS CITY	MO
HEARTLAND MENS CHORUS	KANSAS CITY	MO
INTERNATIONAL ASSOCIATION FOR JAZZ EDUCATION	MANHATTAN	KS
KANSAS CITY BALLET ASSOCIATION	KANSAS CITY	MO
KANSAS CITY CHAPTER OF YOUNG AUDIENCES INC	KANSAS CITY	MO
KANSAS CITY FRIENDS OF ALVIN AILEY	KANSAS CITY	MO
KANSAS CITY REPERTORY THEATRE INC	KANSAS CITY	MO
KANSAS CITY SYMPHONY	KANSAS CITY	MO
KAUFFMAN CENTER FOR THE PERFORMING ARTS	KANSAS CITY	MO
LIBERTY MEMORIAL ASSOCIATION	KANSAS CITY	MO
LYRIC OPERA OF KANSAS CITY INC	KANSAS CITY	MO
METROPOLITAN ARTS COUNCIL OF GREATER KANSAS CITY	KANSAS CITY	MO
MID-AMERICA ARTS ALLIANCE	KANSAS CITY	MO
NATIONAL ASSOCIATION OF BASKETBALL COACHES FOUNDATION INC	KANSAS CITY	MO

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NEGRO LEAGUES BASEBALL MUSEUM INC	KANSAS CITY	MO
NELSON GALLERY FOUNDATION	KANSAS CITY	MO
OREGON-CALIFORNIA TRAILS ASSOCIATION	INDEPENDENCE	MO
PUBLIC TELEVISION 19 INC	KANSAS CITY	MO
QUALITY HILL PRODUCTIONS	KANSAS CITY	MO
STARLIGHT THEATRE ASSOCIATION OF KANSAS CITY INC	KANSAS CITY	MO
TEEL INSTITUTE FOR THE DEVELOPMENT OF INTEGRITY & ETHICAL BEHAVIOR	PRAIRIE VLG	KS
THEATER LEAGUE INC	LEAWOOD	KS
UNICORN THEATRE UNICORN THEATRE	KANSAS CITY	MO
UNION STATION KANSAS CITY INC	KANSAS CITY	MO
WILLIAM ROCKHILL NELSON TRUST	KANSAS CITY	MO
YOUTH SYMPHONY ASSOCIATION OF KANSAS CITY INC	MISSION	KS
ACTORS THEATRE OF LOUISVILLE INC	LOUISVILLE	KY
AFRICAN AMERICAN HERITAGE FOUNDATION INC	LOUISVILLE	KY
BLUE APPLE PLAYERS INC	LOUISVILLE	KY
CENTER FOR INTERFAITH RELATIONS INC	LOUISVILLE	KY
EMBROIDERERS GUILD OF AMERICA INC GROUP RETURN	LOUISVILLE	KY
FUND FOR THE ARTS PROPERTIES FOUNDATION INC	LOUISVILLE	KY
HISTORIC HOMES FOUNDATION INC	LOUISVILLE	KY
J B SPEED ART MUSEUM	LOUISVILLE	KY
KENTUCKY DANCE COUNCIL INC	LOUISVILLE	KY
KENTUCKY MUSEUM OF ART AND CRAFT INC	LOUISVILLE	KY
KENTUCKY PUBLIC RADIO INC	LOUISVILLE	KY
KENTUCKY SHAKESPEARE FESTIVAL INC	LOUISVILLE	KY
LOUISVILLE INTERNATIONAL CULTURAL CENTER INC	LOUISVILLE	KY
LOUISVILLE ORCHESTRA FOUNDATION INC	LOUISVILLE	KY
LOUISVILLE ORCHESTRA INC	LOUISVILLE	KY
LOUISVILLE THEATRICAL ASSOCIATION	LOUISVILLE	KY
MUHAMMAD ALI MUSEUM AND EDUCATION	LOUISVILLE	KY

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MUSIC THEATRE LOUISVILLE INC	LOUISVILLE	KY
NATIONAL SOCIETY OF THE SONS OF THE AMERICAN REVOLUTION	LOUISVILLE	KY
PARTNERSHIP FOR CREATIVE ECONOMIES INC	LOUISVILLE	KY
STAGE ONE THE LOUISVILLE CHILDRENS THEATRE INC	LOUISVILLE	KY
THE LOUISVILLE SCIENCE CENTER INC	LOUISVILLE	KY
AFROWORLD ENTERPRISES LTD	MILWAUKEE	WI
BETTY BRINN CHILDRENS MUSEUM	MILWAUKEE	WI
DANCEWORKS INC	MILWAUKEE	WI
FIRST STAGE MILWAUKEE INC	MILWAUKEE	WI
FLORENTINE OPERA CO INC	MILWAUKEE	WI
GENEVA HISTORICAL SOCIETY ROSE HILL ENDOWMENT FUND	MILWAUKEE	WI
INDIAN SUMMER INC	WEST ALLIS	WI
IRISH FESTIVALS INC	MILWAUKEE	WI
KO-THI DANCE CO INC	MILWAUKEE	WI
LATINO ARTS INC	MILWAUKEE	WI
MARCUS CENTER FOR THE PERFORMING ARTS INC	MILWAUKEE	WI
MATA COMMUNITY MEDIA	MILWAUKEE	WI
MILWAUKEE ART MUSEUM INC	MILWAUKEE	WI
MILWAUKEE BALLET COMPANY INC	MILWAUKEE	WI
MILWAUKEE CHAMBER THEATRE LTD	MILWAUKEE	WI
MILWAUKEE COUNTY HISTORICAL SOCIETY	MILWAUKEE	WI
MILWAUKEE COUNTY WAR MEMORIAL CENTER INC	MILWAUKEE	WI
MILWAUKEE PUBLIC MUSEUM INC	MILWAUKEE	WI
MILWAUKEE PUBLIC THEATRE	MILWAUKEE	WI
MILWAUKEE REPERTORY THEATER INC	MILWAUKEE	WI
MILWAUKEE SHAKESPEARE COMPANY	MILWAUKEE	WI
MILWAUKEE SYMPHONY ORCHESTRA INC	MILWAUKEE	WI
MILWAUKEE WORLD FESTIVAL INC	MILWAUKEE	WI
MILWAUKEE YOUTH SYMPHONY ORCHESTRA INC	MILWAUKEE	WI

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MILWAUKEES FUTURE FOUNDATION INC	MILWAUKEE	WI
MPTV FRIENDS INC	MILWAUKEE	WI
MUSEUM OF WISCONSIN ART INC	W BEND	WI
NEXT ACT THEATRE INC	MILWAUKEE	WI
POLISH HERITAGE ALLIANCE INC	FRANKLIN	WI
POTTERS HOUSE ASSOCIATION INTERNATIONAL INC	PEWAUKEE	WI
PRESENT MUSIC INC	MILWAUKEE	WI
RADIO FOR MILWAUKEE INCORPORATED	MILWAUKEE	WI
SCHAUER ARTS AND ACTIVITIES CENTER INC	HARTFORD	WI
SKYLIGHT OPERA THEATRE CORP	MILWAUKEE	WI
STATE FAIR PARK EXPOSITION CENTER INC	WEST ALLIS	WI
SUNSET PLAYHOUSE INC	ELM GROVE	WI
TEN CHIMNEYS FOUNDATION INC	GENESEE DEPOT	WI
TRINITY IRISH DANCE COMPANY	BROOKFIELD	WI
WAUKESHA COUNTY HISTORICAL SOCIETY INC	WAUKESHA	WI
WISCONSIN CONSERVATORY OF MUSIC INC	MILWAUKEE	WI
ACTORS THEATER OF MINNESOTA	ST PAUL	MN
AFTON HISTORICAL SOCIETY PRESS	AFTON	MN
AMERICAN COMPOSERS FORUM	ST PAUL	MN
AMERICAN PUBLIC MEDIA GROUP	ST PAUL	MN
AMERICAN SWEDISH INSTITUTE	MINNEAPOLIS	MN
ARTS MIDWEST	MINNEAPOLIS	MN
ARTSPACE PROJECTS INC	MINNEAPOLIS	MN
ASIAN MEDIA ACCESS INC	MINNEAPOLIS	MN
BALLET OF THE DOLLS INC	MINNEAPOLIS	MN
BALLET WORKS INC	MINNEAPOLIS	MN
BURNSVILLE HOCKEY CLUB	BURNSVILLE	MN
CANTUS	MINNEAPOLIS	MN
CENTER FOR COMMUNICATION AND DEVELOPMENT	MINNEAPOLIS	MN

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CENTER FOR ETHICAL BUSINESS CULTURES	MINNEAPOLIS	MN
CHILDRENS THEATER COMPANY AND SCHOOL	MINNEAPOLIS	MN
CLASSICAL SOUTH FLORIDA INC	ST PAUL	MN
CLIMB THEATRE INC	INVER GROVE HGTS	MN
COFFEE HOUSE PRESS	MINNEAPOLIS	MN
COMPAS INC	ST PAUL	MN
DEVELOPMENT EXCHANGE INC	MINNEAPOLIS	MN
FRIENDS OF THE MINNESOTA STATE CAPITOL	ST PAUL	MN
GERMANIC-AMERICAN INSTITUTE	SAINT PAUL	MN
GRAYWOLF PRESS	MINNEAPOLIS	MN
GREATER TWIN CITIES YOUTH SYMPHONIES	MINNEAPOLIS	MN
GUTHRIE THEATRE FOUNDATION	MINNEAPOLIS	MN
HENNEPIN CENTER FOR THE ARTS	MINNEAPOLIS	MN
HENNEPIN THEATRE TRUST	MINNEAPOLIS	MN
HIGHPOINT CENTER FOR PRINTMAKING	MINNEAPOLIS	MN
HOVLAND CONSERVATORY OF MUSIC	ARDEN HILLS	MN
IFP MINNESOTA	ST PAUL	MN
ILLUSION THEATER AND SCHOOL INC	MINNEAPOLIS	MN
IN THE HEART OF THE BEAST PUPPET AND MASK THEATRE	MINNEAPOLIS	MN
INDIAN LAND TENURE FOUNDATION	LITTLE CANADA	MN
INTERMEDIA ARTS OF MINNESOTA INC	MINNEAPOLIS	MN
INTERNATIONAL SPANISH LANGUAGE ACADEMY	MINNETONKA	MN
IRISH FAIR OF MINNESOTA	SAINT PAUL	MN
JUNGLE THEATRE	MINNEAPOLIS	MN
LOFT INC / OPEN BOOK	MINNEAPOLIS	MN
LUNDSTRUM CENTER FOR THE PERFORMING ARTS	MINNEAPOLIS	MN
LUTHERAN MUSIC PROGRAM	MINNEAPOLIS	MN
LYRIC ARTS COMPANY OF ANOKA INC	ANOKA	MN
MACPHAIL CENTER FOR MUSIC	MINNEAPOLIS	MN
METROPOLITAN REGIONAL ARTS COUNCIL	ST PAUL	MN

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MIDWEST ART CONSERVATION CENTER INC	MINNEAPOLIS	MN
MILKWEED EDITIONS INC	MINNEAPOLIS	MN
MINNEAPOLIS SOCIETY OF FINE ARTS	MINNEAPOLIS	MN
MINNESOTA BOOK & LITERARY ARTS BUILDING INC	MINNEAPOLIS	MN
MINNESOTA CENTER FOR BOOK ARTS	MINNEAPOLIS	MN
MINNESOTA CENTER FOR PHOTOGRAPHY	AFTON	MN
MINNESOTA CHILDRENS MUSEUM	ST PAUL	MN
MINNESOTA DANCE THEATRE & THE DANCE INSTITUTE	MINNEAPOLIS	MN
MINNESOTA FILM ARTS	MINNEAPOLIS	MN
MINNESOTA FRINGE FESTIVAL	MINNEAPOLIS	MN
MINNESOTA HISTORICAL SOCIETY	SAINT PAUL	MN
MINNESOTA HUMANITIES CENTER	ST PAUL	MN
MINNESOTA LANDMARKS	ST PAUL	MN
MINNESOTA MOTION PICTURE AND TELEVISION BOARD INC	MINNEAPOLIS	MN
MINNESOTA MUSEUM OF AMERICAN ART	ST PAUL	MN
MINNESOTA ORCHESTRAL ASSOCIATION	MINNEAPOLIS	MN
MINNESOTA PUBLIC RADIO AMERICAN PUBLIC MEDIA	ST PAUL	MN
MINNESOTA TRANSPORTATION MUSEUM INC	SAINT PAUL	MN
MINNESOTA YOUTH SYMPHONIES	ST PAUL	MN
MINNETONKA CENTER FOR THE ARTS	WAYZATA	MN
MINNPOST	MINNEAPOLIS	MN
MIXED BLOOD THEATRE COMPANY	MINNEAPOLIS	MN
MUSEUM OF RUSSIAN ART	MINNEAPOLIS	MN
NATIONAL EXERCISE TRAINERS ASSOCIATION	MINNEAPOLIS	MN
NATIONAL SCHOLASTIC PRESS ASSOCIATION	MINNEAPOLIS	MN
NORTH SUBURBS ACCESS CORPORATION	ROSEVILLE	MN
NORTHERN CLAY CENTER	MINNEAPOLIS	MN
NORTHWEST SUBURBS COMMUNITY ACCESS CORPORATION	BROOKLYN PARK	MN
OAKLEAF ENDOWMENT & TRUST FOR THE WALKER ART CENTER	MINNEAPOLIS	MN
OAKLEAF ENDOWMENT TRUST FOR MINNESOTA ORCHESTRA	MINNEAPOLIS	MN

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ORDWAY CENTER FOR THE PERFORMING ARTS	ST PAUL	MN
ORDWAY CIRCLE OF STARS	SAINT PAUL	MN
OUR FAIR CAROUSEL INC	SAINT PAUL	MN
PARK SQUARE THEATRE COMPANY	SAINT PAUL	MN
PENUMBRA THEATRE COMPANY INC	ST PAUL	MN
PHIPPS CENTER FOR THE ARTS INC	HUDSON	WI
PLAYWRIGHTS CENTER INC	MINNEAPOLIS	MN
PUBLIC ART SAINT PAUL	ST PAUL	MN
PUBLIC RADIO INTERNATIONAL INC	MINNEAPOLIS	MN
RAMSEY COUNTY HISTORICAL SOCIETY IN C	ST PAUL	MN
SAINT PAUL CHAMBER ORCHESTRA SOCIETY	ST PAUL	MN
SAINT PAUL CONSERVATORY FOR PERFORMING ARTISTS	ST PAUL	MN
SCHUBERT CLUB INC	ST PAUL	MN
SCIENCE MUSEUM OF MINNESOTA	ST PAUL	MN
SEWARD REDESIGN INC	MINNEAPOLIS	MN
SOUTHERN CALIFORNIA PUBLIC RADIO	ST PAUL	MN
SOUTHERN THEATER FOUNDATION CORP	MINNEAPOLIS	MN
ST PAUL CONSERVATORY OF MUSIC	SAINT PAUL	MN
ST PAUL NEIGHBORHOOD NETWORK	ST PAUL	MN
STAGES THEATRE COMPANY INC	HOPKINS	MN
TEXTILE CENTER OF MINNESOTA	MINNEAPOLIS	MN
THE BAKKEN	MINNEAPOLIS	MN
THE CEDAR CULTURAL CENTER INC SOCIETY FOR TRADITIONAL ARTS	MINNEAPOLIS	MN
THE FITZGERALD THEATER COMPANY	ST PAUL	MN
THE HISTORY THEATRE INC	SAINT PAUL	MN
THE MINNESOTA OPERA	MINNEAPOLIS	MN
THE ROSE ENSEMBLE	ST PAUL	MN
THEATER MU INCORPORATED	ST PAUL	MN
THEATRE DE LA JEUNE LUNE	ST PAUL	MN

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TRIO WOLF CREEK DISTANCE LEARNING	LINDSTROM	MN
TWIN CITIES GAY MENS CHORUS	MINNEAPOLIS	MN
TWIN CITIES PUBLIC TELEVISION INC	ST PAUL	MN
TWIN CITIES REGIONAL CABLE CHANNEL	MINNEAPOLIS	MN
VOCAL ESSENCE	MINNEAPOLIS	MN
WALKER ART CENTER INC	MINNEAPOLIS	MN
WORLD PRESS INSTITUTE	ST PAUL	MN
YOUNG AUDIENCES OF THE UPPER MIDWEST	SAINT PAUL	MN
YOUTH PERFORMANCE COMPANY	MINNEAPOLIS	MN
ZENON DANCE COMPANY AND SCHOOL INC	MINNEAPOLIS	MN
ADVENTURE SCIENCE CENTER NASHVILLE	NASHVILLE	TN
ASSOCIATION FOR THE PRESERVATION OF TENNESSEE ANTIQUITIES	NASHVILLE	TN
BELCOURT THEATRE INC	NASHVILLE	TN
CHEEKWOOD BOTANICAL GARDEN AND MUSEUM OF ART	NASHVILLE	TN
CHILDRENS MUSEUM CORPORATION OF RUTHERFORD COUNTY	MURFREESBORO	TN
COUNTRY MUSIC FOUNDATION INC	NASHVILLE	TN
COUNTRY RADIO BROADCASTERS INC	NASHVILLE	TN
FRIENDS OF THE ARTS AND LITERATURE IN SUMNER INC	HENDERSONVLLE	TN
FRIST CENTER FOR THE VISUAL ARTS INC	NASHVILLE	TN
HARMONY FOUNDATION INTERNATIONAL INC	NASHVILLE	TN
HERITAGE FOUNDATION OF FRANKLIN AND WILLIAMSON COUNTY	FRANKLIN	TN
HISTORIC CARNTON PLANTATION ASSOCIATION INC	FRANKLIN	TN
HUMANITIES TENNESSEE	NASHVILLE	TN
LADIES HERMITAGE ASSOCIATION	HERMITAGE	TN
MUSIC CITY BOWL INC	NASHVILLE	TN
MUSIC CITY INC	NASHVILLE	TN
NASHVILLE ACADEMY THEATRE AND NASHVILLE CHILDRENS THEATER ASS	NASHVILLE	TN
NASHVILLE BALLET	NASHVILLE	TN
NASHVILLE OPERA ASSOCIATION	NASHVILLE	TN

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NASHVILLE PUBLIC RADIO	NASHVILLE	TN
NASHVILLE PUBLIC TELEVISION INC	NASHVILLE	TN
NASHVILLE SYMPHONY ASSOCIATION	NASHVILLE	TN
QUALITY REVIEW PANEL	FRANKLIN	TN
SOCIETY FOR PRESERVATION & ENCRGMNT OF BARBERSHOP QUARTET SINGING	NASHVILLE	TN
TENNESSEE REPERTORY THEATRE INC	NASHVILLE	TN
TENNESSEE RESIDENCE FOUNDATION	NASHVILLE	TN
ART 4 LIFE	PORTLAND	OR
ARTISTS REPERTORY THEATRE	PORTLAND	OR
BODYVOX INC	PORTLAND	OR
BROADWAY ROSE THEATRE CO	TIGARD	OR
CHAMBER MUSIC NORTHWEST	PORTLAND	OR
CLACKAMAS HERITAGE PARTNERS	OREGON CITY	OR
CONFLUENCES	VANCOUVER	WA
DO JUMP EXTREMELY PHYSICAL THEATRE	PORTLAND	OR
ETHOS INC	PORTLAND	OR
FILM ACTION OREGON	PORTLAND	OR
FOOD ALLIANCE	PORTLAND	OR
FRENCH AMERICAN INTERNATIONAL SCHOOL	PORTLAND	OR
IMAGO THE THEATRE MASK ENSEMBLE	PORTLAND	OR
INTERCULTURAL COMMUNICATION INSTITUTE	PORTLAND	OR
LAKEWOOD THEATRE COMPANY	LAKE OSWEGO	OR
LITERARY ARTS INC	PORTLAND	OR
METROEAST COMMUNITY MEDIA	GRESHAM	OR
METROPOLITAN YOUTH SYMPHONY	PORTLAND	OR
MUSEUM OF CONTEMPORARY CRAFTS	PORTLAND	OR
NORTHWEST CHILDRENS THEATER AND SCHOOL INC	PORTLAND	OR
OREGON BALLET THEATRE	PORTLAND	OR
OREGON CHILDRENS THEATRE COMPANY	PORTLAND	OR

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OREGON COUNCIL FOR THE HUMANITIES	PORTLAND	OR
OREGON HISTORICAL SOCIETY	PORTLAND	OR
OREGON INTERNATIONAL AIRSHOW HILLSBORO INC	HILLSBORO	OR
OREGON MUSEUM OF SCIENCE AND INDUSTRY	PORTLAND	OR
OREGON PUBLIC BROADCASTING	PORTLAND	OR
OREGON SYMPHONY ASSOCIATION	PORTLAND	OR
PIONEER COURTHOUSE SQUARE OF PORTLAND INC	PORTLAND	OR
PORTLAND ART MUSEUM	PORTLAND	OR
PORTLAND BAROQUE ORCHESTRA	PORTLAND	OR
PORTLAND CENTER STAGE	PORTLAND	OR
PORTLAND CHILDRENS MUSEUM	PORTLAND	OR
PORTLAND COMMUNITY MEDIA	PORTLAND	OR
PORTLAND INSTITUTE FOR CONTEMPORARY ART	PORTLAND	OR
PORTLAND JAZZ FESTIVAL INCORPORATED	PORTLAND	OR
PORTLAND OPERA ASSOCIATION INC	PORTLAND	OR
PORTLAND PIANO INTERNATIONAL	PORTLAND	OR
PORTLAND THEATER PRODUCTIONS	PORTLAND	OR
REGIONAL ARTS & CULTURE COUNCIL	PORTLAND	OR
SHOKOOKAI OF PORTLAND	BEAVERTON	OR
TEARS OF JOY THEATRE	VANCOUVER	WA
THE VANCOUVER SYMPHONY ORCHESTRA	VANCOUVER	WA
VANCOUVER NATIONAL HISTORIC RESERVE TRUST	VANCOUVER	WA
WHITE BIRD	PORTLAND	OR
WORDSTOCK	PORTLAND	OR
YOUNG AUDIENCES OF OREGON INC	PORTLAND	OR
AMERICAN DANCE FESTIVAL INC	DURHAM	NC
ARTS CENTER	CARRBORO	NC
ARTSPACE INC	RALEIGH	NC
CAROLINA BALLET INC	RALEIGH	NC

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CAROLINA THEATRE OF DURHAM INC	DURHAM	NC
DOC ARTS INC	DURHAM	NC
DURHAM ARTS COUNCIL INC	DURHAM	NC
EDUCATIONAL INFORMATION CORPORATION WCPE RADIO	WAKE FOREST	NC
MUSIC MAKER RELIEF FOUNDATION INC	HILLSBOROUGH	NC
NATIONAL HUMANITIES CENTER	RESEARCH TRIANGE PK	NC
NORTH CAROLINA MUSEUM OF LIFE & SCIENCE	DURHAM	NC
NORTH CAROLINA SOCIETY	RALEIGH	NC
NORTH CAROLINA SYMPHONY SOCIETY INC	RALEIGH	NC
NORTH CAROLINA THEATRE	RALEIGH	NC
OPERA COMPANY OF NORTH CAROLINA INC	RALEIGH	NC
OXFORD UNIVERSITY PRESS INC	CARY	NC
RALEIGH LITTLE THEATRE	RALEIGH	NC
ST JOSEPHS HISTORIC FOUNDATION INC	DURHAM	NC
SUN PUBLISHING COMPANY	CHAPEL HILL	NC
THE HISTORIC PRESERVATION FOUNDATION OF NORTH CAROLINA INC	RALEIGH	NC
THE NORTH CAROLINA MUSEUM OF HISTORY ASSOCIATES INC	RALEIGH	NC
THEATRE IN THE PARK	RALEIGH	NC
UNITED ARTS COUNCIL OF RALEIGH AND WAKE COUNTY INC	RALEIGH	NC
UNIVERSITY OF NORTH CAROLINA PRESS	CHAPEL HILL	NC
A REASON TO SURVIVE	SAN DIEGO	CA
ASSOCIATION FOR FAMILY INTERACTIVE MEDIA	POWAY	CA
BALBOA ART CONSERVATION CENTER	SAN DIEGO	CA
BLACK CONTRACTORS ASSOCIATION OF SAN DIEGO INC	SAN DIEGO	CA
CALIFORNIA CENTER FOR THE ARTS ESCONDIDO FOUNDATION	ESCONDIDO	CA
CALIFORNIA SURF MUSEUM ENCINITAS	OCEANSIDE	CA
CHRISTIAN COMMUNITY THEATRE	EL CAJON	CA
CINEMACORP OF THE CALIFORNIAS	SAN DIEGO	CA

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CITY BALLET INC	SAN DIEGO	CA
CORONADO HISTORICAL ASSOCIATION	CORONADO	CA
CYGNET THEATRE COMPANY	SAN DIEGO	CA
DIVERSIONARY THEATRE PRODUCTIONS INC	SAN DIEGO	CA
HOUSE OF HOSPITALITY ASSOCIATION INC	SAN DIEGO	CA
INSTALLATION GALLERY	SAN DIEGO	CA
INTERNATIONAL FOUNDATION FOR MUSIC RESEARCH	CARLSBAD	CA
LA JOLLA MUSIC SOCIETY	LA JOLLA	CA
LAMBS PLAYERS THEATRE	CORONADO	CA
LYRIC OPERA SAN DIEGO	SAN DIEGO	CA
MAINLY MOZART INC	SAN DIEGO	CA
MALASHOCK DANCE & COMPANY	SAN DIEGO	CA
MARITIME MUSEUM ASSOCIATION OF SAN DIEGO	SAN DIEGO	CA
MEDIA ARTS CENTER SAN DIEGO	SAN DIEGO	CA
MINGEI INTERNATIONAL INC	SAN DIEGO	CA
MUSEUM OF CONTEMPORARY ART SAN DIEGO	LA JOLLA	CA
MUSEUM OF PHOTOGRAPHIC ARTS	SAN DIEGO	CA
NEW AMERICANS MUSEUM INC	SAN DIEGO	CA
NORTH COAST REPERTORY THEATRE	SOLANA BEACH	CA
NTC FOUNDATION	SAN DIEGO	CA
OCEANSIDE COMMUNITY SERVICE TELEVISION CORPORATION	OCEANSIDE	CA
OCEANSIDE MUSEUM OF ART	OCEANSIDE	CA
OLD GLOBE THEATRE	SAN DIEGO	CA
PANGEA FOUNDATION	SAN DIEGO	CA
PUTNAM FOUNDATION	SAN DIEGO	CA
SAN DIEGO AIR & SPACE MUSEUM	SAN DIEGO	CA
SAN DIEGO AUTOMOTIVE MUSEUM INC	SAN DIEGO	CA
SAN DIEGO CENTER FOR JEWS CULTURE	LA JOLLA	CA
SAN DIEGO CHAMBER ORCHESTRA	SAN DIEGO	CA
SAN DIEGO CIVIC LIGHT OPERA ASSOCIATION INC	SAN DIEGO	CA

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SAN DIEGO HALL OF CHAMPIONS INC	SAN DIEGO	CA
SAN DIEGO HISTORICAL SOCIETY	SAN DIEGO	CA
SAN DIEGO JUNIOR THEATRE	SAN DIEGO	CA
SAN DIEGO MODEL RAILROAD MUSEUM INC ROBERT MCBANE	SAN DIEGO	CA
SAN DIEGO MUSEUM OF ART	SAN DIEGO	CA
SAN DIEGO MUSEUM OF MAN	SAN DIEGO	CA
SAN DIEGO NIHONGO KYOIKU SHINKOKAI	SAN DIEGO	CA
SAN DIEGO OPERA ASSOCIATION	SAN DIEGO	CA
SAN DIEGO REPERTORY THEATRE INC	SAN DIEGO	CA
SAN DIEGO SOCIETY OF NATURAL HISTORY BALBOA PARK	SAN DIEGO	CA
SAN DIEGO SYMPHONY FOUNDATION	SAN DIEGO	CA
SAN DIEGO SYMPHONY ORCHESTRA ASSOCIATION	SAN DIEGO	CA
SAN DIEGO THEATRES INC	SAN DIEGO	CA
SAN DIEGO YOUTH SYMPHONY	SAN DIEGO	CA
SAVE OUR HERITAGE ORGANIZATION	SAN DIEGO	CA
TESSITURA NETWORK INC	SANTEE	CA
THE NEW CHILDRENS MUSEUM	SAN DIEGO	CA
THEATRE & ARTS FOUNDATION OF SAN DIEGO COUNTY	LA JOLLA	CA
USS MIDWAY MUSEUM	SAN DIEGO	CA
VOICE OF SAN DIEGO	SAN DIEGO	CA
YOUNG AUDIENCES OF SAN DIEGO	SAN DIEGO	CA

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Appendix D – Complete List of Indicators

Indicator	Data Source
09-14 Pop growth	U.S. Census Bureau / Form 990 Data
10 year change in agg sales per capita	U.S. Census Bureau / Form 990 Data
10 year change in private support	U.S. Census Bureau / Form 990 Data
10 year change n public support	U.S. Census Bureau / Form 990 Data
2009 median income	U.S. Census Bureau
A&C Orgs as % of all Entertainment	Form 990 Data / Various sources
A&C Orgs per 1 million 2009 population	U.S. Census Bureau / Form 990 Data
Artists per Thousand Working Adults	Bureau of Labor Statistics
Average Building, Land Equip. after Depreciation	Form 990 Data
Average Size of A&C Org	Form 990 Data
Average Total Assets per A&C Org	Form 990 Data
Contributions / Total Expenses	Form 990 Data
GDP / 2009 Population	Bureau of Economic Analysis / U.S. Census Bureau
Median Artist Wage / Median All Wage	Bureau of Labor Statistics
Net Assets Change/Net Assets BOY	Form 990 Data
Payroll / Total Expense	Form 990 Data
Permanently Restricted Net Assets / EOY	Form 990 Data
Program Revenue / 2009 Population	U.S. Census Bureau / Form 990 Data
Simmons Mediamark Index - Belong to arts assoc	Nielsen Claritas
Simmons Mediamark Index - Go to live theatre	Nielsen Claritas
Simmons Mediamark Index - Interest in Arts	Nielsen Claritas
Simmons Mediamark Index - Make charitable contributions	Nielsen Claritas
Total Private Support / 2009 Population	U.S. Census Bureau / Form 990 Data
Total Public Support / 2009 Population	U.S. Census Bureau / Form 990 Data
Total Revenue/Total Liabilities	Form 990 Data
UR Net Assets - BLE	Form 990 Data
Venue seats per 1,000 2009 Population	Various sources / U.S. Census Bureau

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Appendix E – Notes on Dedicated Tax Revenue Streams

Mechanism Types

Most existing public funding mechanisms can be placed in one of four categories:

1. **Use Fees & Levies:** most non-general fund examples of public funding fall into this category, which assesses property or services used by the public.
2. **Income-based Taxes:** such mechanisms seek to draw on existing wage taxes. The most widely used example tax the wages of out-of-state entertainers and athletes.
3. **Government Appropriations & Incentives:** this category covers state government approved appropriations for arts & cultural funding.
4. **Public-private Partnerships:** partnerships have been built in which private investment is combined with public resources to improve a variety of community assets, including arts & cultural facilities.

Funding Examples

In order to provide a more detailed look at possible dedicated tax revenue streams, twelve examples are provided below. While they vary widely in terms of funds provided for arts & cultural entities, just three kinds of tax revenues – property, sales and lodging –account for half of these funding examples.

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Mechanism / Program Name	Annual Yield to Arts & Culture ($M)	Source of Funds	Mechanism Type
St. Louis Zoo Museum District	63	Property Tax	Use Fees & Levies
Denver Scientific & Cultural Facilities District	38	Sales Tax	Use Fees & Levies
Massachusetts Campaign for Cultural Facilities	25	Lodging Taxes & General Revenues	Government Appropriations
Mesa Quality of Life Tax	22 *	Sales Tax	Use Fees & Levies
Building for the Arts Program	12	Capital Bonding	Government Appropriations
Massachusetts Arts Lottery	9.6	Lottery Funds	Use Fees & Levies
King County Cultural Facility & Fixed Assets Program	7	Lodging Tax	Use Fees & Levies
Allegheny Regional Asset District	6.7	Sales Tax	Use Fees & Levies
Las Vegas Performing Arts Center Funding	6.5	Car Rental Tax	Use Fees & Levies
Rio Nuevo Multipurpose Facilities District	6 **	Tax Increment Financing	Public-private Partnerships
Seattle Arts Fund	1.2	Admissions Tax	Use Fees & Levies
Missouri Cultural Trust	0.6	Athletes & Entertainers Tax	Income Tax

* $110 million over five years

** $60 million over 10 years

Characteristics

- **Enacting Authority.** This primarily differentiates between those mechanisms which required a public referendum (property tax and sales tax increases, for example) and those which required only approval of a local or state governing body (legislature, county board of supervisors, etc.). In our examples, only three mechanisms required a referendum for enactment.
- **Geographic Coverage.** Only three of these examples draw exclusively on a “city” geography; the majority of funding mechanisms draw their revenues from a broad regional area.

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- **Renewal Term.** Half of the mechanisms we studied have no specific 'sunset' date, while another six have renewal terms ranging from 8 to 20 years.
- **Dedication of Funds.** A key issue regarding these mechanisms is whether the funds collected are dedicated to arts and cultural uses, or whether these funds can be directed toward other uses given the right conditions (need, political will, etc.). Two-thirds of the mechanisms studied are dedicated to arts and cultural uses, though those whose dedication required legislative approval appear subject to possible revision by the legislative process, and in some cases 'dedicated' funds have been redirected by governing bodies to non-arts uses.
- **Purpose of Funds.** Funds may be used for capital, programming or operating support.

Mechanism / Program Name	Enacting Authority	Geographic Coverage	Term (Years)	Dedicated Funding?	Purpose of Funds
St. Louis Zoo Museum District	Referendum	City & County	In Perpetuity	Y	Operations & Capital Needs
Denver Scientific & Cultural Facilities District	Special District	7 Counties	10	Y	Primarily operating with some capital support
Massachusetts Campaign for Cultural Facilities	Legislature	Statewide	10	Y	New construction, maintenance & renovation
Mesa Quality of Life Tax	Referendum	City	8	N	Capital & operating support
Building for the Arts Program	Legislature	Statewide	In Perpetuity	N	Capital construction & renovation
Massachusetts Arts Lottery	Legislature	Statewide	In Perpetuity	N	Operations & programming
King County Cultural Facility & Fixed Assets Program	County	County	In Perpetuity	Y	Facility purchase, construction & remodeling
Allegheny Regional Asset District	Legislature	County	In Perpetuity	Y	Mostly operating with some capital support
Las Vegas (Smith) Performance Arts Center Funding	County	County	20	Y	Construction of Smith Performing Arts Center
Rio Nuevo Multipurpose Facilities District	Referendum	Downtown Tucson	10	N	Capital construction & renovation
Seattle Arts Fund	City	City	In Perpetuity	Y	Capital & operating support
Missouri Cultural Trust	Legislature	Statewide	10	Y	Capital improvements, endowments

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Appendix F – Major Cultural Institutions by Market Size

Organization	Direct Support	Indirect Support	Government Grants	Total Contributed Revenue	Program Revenue	Total Revenue	Total Expenses	Net Income	Endowment
Raleigh									
NORTH CAROLINA SYMPHONY SOCIETY INC	$5,360,300	$0	$3,130,963	$8,491,263	$3,941,838	$13,285,473	$13,421,958	-$136,485	$0
NORTH CAROLINA MUSEUM OF LIFE & SCIENCE	$644,446	$0	$2,567,384	$3,211,830	$1,882,355	$6,228,961	$6,581,041	-$352,080	$30,000
CAROLINA BALLET INC	$2,778,025	$0	$478,000	$3,256,025	$2,138,772	$5,464,396	$4,924,414	$539,982	$0
NORTH CAROLINA THEATRE	$848,744	$0	$25,000	$873,744	$2,886,767	$3,971,560	$3,544,021	$427,539	$24,947
AMERICAN DANCE FESTIVAL INC	$2,647,213	$0	$261,858	$2,909,071	$1,721,715	$5,201,894	$3,153,720	$2,048,174	$5,514,673
CAROLINA THEATRE OF DURHAM INC	$277,768	$0	$14,952	$292,720	$1,780,219	$2,166,907	$2,282,391	-$115,484	$0
DURHAM ARTS COUNCIL INC	$322,665	$0	$674,567	$997,232	$448,532	$1,702,305	$1,755,355	-$53,050	$286,306
UNITED ARTS COUNCIL OF RALEIGH AND WAKE COUNTY INC	$498,562	$0	$632,507	$1,131,069	$344,341	$1,773,794	$1,659,352	$114,442	$258,617
ARTS CENTER	$158,473	$0	$106,350	$264,823	$978,463	$1,339,569	$1,465,406	-$125,867	$0
Louisville									
ACTORS THEATRE OF LOUISVILLE INC	$2,542,167	$0	$281,950	$2,824,117	$3,803,074	$7,242,589	$9,833,170	-$2,590,581	$5,295,314
J B SPEED ART MUSEUM	$7,199,028	$0	$81,262	$7,280,290	$301,814	$12,905,606	$7,575,275	$5,330,331	$5,484,794
LOUISVILLE ORCHESTRA INC	$3,873,944	$1,155,000	$182,026	$5,210,970	$2,160,668	$7,951,021	$6,649,759	$1,301,262	$9,144,912

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Organization	Direct Support	Indirect Support	Government Grants	Total Contributed Revenue	Program Revenue	Total Revenue	Total Expenses	Net Income	Endowment
LOUISVILLE THEATRICAL ASSOCIATION	$81,326	$0	$0	$81,326	$6,544,084	$6,629,694	$6,602,113	$27,581	$0
THE LOUISVILLE SCIENCE CENTER INC	$938,879	$0	$588,225	$1,527,104	$2,512,317	$4,716,985	$6,161,834	-$1,444,849	$389,380
MUHAMMAD ALI MUSEUM AND EDUCATION	$4,608,028	$0	$0	$4,608,028	-$1,371,818	$3,993,796	$4,148,320	-$154,524	$1,000,050
KENTUCKY DANCE COUNCIL INC	$911,534	$137,450	$0	$1,672,215	$1,255,758	$3,067,935	$3,265,711	-$197,776	$30,940
KENTUCKY MUSEUM OF ART AND CRAFT INC	$300,557	$174,559	$29,617	$504,733	$79,570	$919,618	$1,215,316	-$295,698	$842,268
Jacksonville									
JACKSONVILLE SYMPHONY ASSOCIATION	$3,095,559	$0	$643,263	$3,738,822	$3,210,295	$8,679,068	$8,425,226	$253,842	$0
DEETTE HOLDEN CUMMER MUSEUM FOUNDATION INC	$11,376,795	$0	$614,538	$11,991,333	$800,194	$16,172,606	$5,513,949	$10,658,657	$0
CULTURAL COUNCIL OF GREATER JACKSONVILLE INC	$128,742	$0	$3,870,510	$3,999,252	$360	$4,036,997	$4,007,362	$29,635	$0
THE FLORIDA THEATRE PERFORMING ARTS	$324,963	$0	$465,353	$790,316	$2,865,129	$3,675,254	$3,623,587	$51,667	$0
MUSEUM OF SCIENCE & HISTORY OF JACKSONVILLE INC	$317,137	$17,884	$570,366	$905,387	$1,157,534	$2,597,780	$2,643,266	-$45,486	$815,696
MUSEUM OF CONTEMPORARY ART JACKSONVILLE INC	$1,104,686	$0	$306,805	$1,411,491	$426,479	$2,026,212	$2,427,415	-$401,203	$605,000

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Organization	Direct Support	Indirect Support	Government Grants	Total Contributed Revenue	Program Revenue	Total Revenue	Total Expenses	Net Income	Endowment
Milwaukee									
MILWAUKEE WORLD FESTIVAL INC	$5,680,067	$0	$108,600	$5,788,667	$27,049,930	$35,318,665	$28,469,630	$6,849,035	$0
MILWAUKEE ART MUSEUM INC	$8,900,012	$0	$500,332	$9,400,344	$2,503,668	$17,005,328	$16,860,381	$144,947	$16,138,635
MILWAUKEE SYMPHONY ORCHESTRA INC	$8,119,300	$3,070,675	$255,257	$11,445,232	$3,980,826	$15,764,124	$16,732,746	-$968,622	$27,839,713
MILWAUKEE PUBLIC MUSEUM INC	$4,808,261	$15,500	$3,671,952	$8,495,713	$2,211,557	$11,789,220	$11,485,336	$303,884	$0
MILWAUKEE REPERTORY THEATER INC	$1,064,707	$1,291,530	$154,592	$2,510,829	$5,121,486	$8,248,532	$9,963,423	-$1,714,891	$7,947,511
MARCUS CENTER FOR THE PERFORMING ARTS INC	$556,867	$0	$1,280,000	$1,836,867	$6,404,781	$10,154,030	$9,904,429	$249,601	$0
MILWAUKEE BALLET COMPANY INC	$1,384,466	$844,265	$54,008	$2,282,739	$2,660,613	$5,251,080	$5,348,527	-$97,447	$113,315
FIRST STAGE MILWAUKEE INC PERFORMING ARTS CENTER	$1,384,630	$328,062	$95,745	$1,808,437	$2,470,358	$4,383,727	$3,858,319	$525,408	$0
FLORENTINE OPERA CO INC	$1,977,720	$751,799	$69,052	$2,798,571	$936,978	$4,028,289	$3,526,550	$501,739	$1,103,052
SKYLIGHT OPERA THEATRE CORP	$1,003,868	$597,094	$53,974	$1,654,936	$1,016,444	$2,849,153	$3,313,952	-$464,799	$2,569,608
Nashville									
NASHVILLE SYMPHONY ASSOCIATION	$13,980,150	$0	$492,182	$14,472,332	$7,775,611	$14,109,189	$33,184,672	-$19,075,483	$2,500,000
TUA RETENTION BONUS AGREEMENT TN PERFORMING ARTS CENTER	$941,788	$943,385	$719,394	$2,604,567	$9,855,697	$12,306,691	$12,668,359	-$361,668	$0

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Organization	Direct Support	Indirect Support	Government Grants	Total Contributed Revenue	Program Revenue	Total Revenue	Total Expenses	Net Income	Endowment
COUNTRY MUSIC FOUNDATION INC	$2,750,938	$0	$388,029	$3,138,967	$5,860,002	$11,158,453	$12,558,119	-$1,399,666	$2,190,500
FRIST CENTER FOR THE VISUAL ARTS IN C	$8,587,718	$908,535	$515,924	$10,012,177	$1,164,411	$12,375,877	$11,682,592	$693,285	$0
CHEEKWOOD BOTANICAL GARDEN AND MUSEUM OF ART	$4,088,292	$0	$255,286	$4,343,578	$1,783,029	$8,401,960	$7,596,053	$805,907	$2,528,052
ADVENTURE SCIENCE CENTER NASHVILLE	$7,014,492	$0	$520,300	$7,534,792	$1,318,846	$9,448,906	$4,698,392	$4,750,514	$1,622,868
MUSIC CITY BOWL INC	$305,575	$0	$0	$305,575	$4,511,137	$4,920,329	$4,474,067	$446,252	$0
NASHVILLE BALLET	$1,632,101	$1,787	$196,766	$1,830,654	$1,301,247	$3,166,789	$2,876,534	$290,255	$71,030
HARMONY FOUNDATION INTERNATIONAL INC	$1,047,215	$0	$0	$1,047,215	$37,137	$1,394,595	$2,833,911	-$1,439,316	$2,633,446
NASHVILLE OPERA ASSOCIATION	$4,107,451	$0	$201,052	$4,308,503	$644,499	$5,093,185	$2,451,102	$2,642,083	$408,165
MUSIC CITY INC	NULL	NULL	NULL	$107,887	$1,254,424	$1,362,350	$1,288,569	$73,781	$0
TENNESSEE REPERTORY THEATRE INC	$695,973	$0	$110,431	$806,404	$261,252	$1,092,733	$1,047,579	$45,154	$0
Austin									
BALLET AUSTIN INCORPORATED	$3,691,589	$0	$153,474	$3,845,063	$2,861,120	$7,075,308	$4,542,308	$2,533,000	$0
AUSTIN LYRIC OPERA	$2,457,601	$0	$143,987	$2,601,588	$2,092,788	$4,868,177	$4,164,466	$703,711	$0
AUSTIN THEATRE ALLIANCE	$1,264,880	$0	$108,900	$1,373,780	$2,237,869	$4,462,027	$4,029,266	$432,761	$0
AUSTIN MUSEUM OF ART INC	$597,556	$232,151	$142,221	$971,928	$971,909	$3,358,375	$3,734,116	-$375,741	$0
AUSTIN SYMPHONY ORCHESTRA SOCIETY	$2,479,846	$0	$159,428	$2,639,274	$1,384,110	$4,197,906	$3,646,027	$551,879	$21,000
ZACHARY SCOTT THEATER CENTER	$1,423,301	$0	$14,166	$1,437,467	$2,429,076	$4,144,064	$3,184,255	$959,809	$29,169

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Organization	Direct Support	Indirect Support	Government Grants	Total Contributed Revenue	Program Revenue	Total Revenue	Total Expenses	Net Income	Endowment
AUSTIN CHILDRENS MUSEUM	$984,588	$0	$146,000	$1,130,588	$736,319	$2,456,219	$2,306,940	$149,279	$1,658,710
GREATER AUSTIN PERFORMING ARTS CENTER	$9,987,831	$0	$0	$9,987,831	$0	$10,323,378	$1,831,480	$8,491,898	$9,050,000
AUSTIN FILM SOCIETY	$1,124,592	$0	$186,657	$1,311,249	$163,764	$1,589,157	$1,569,519	$19,638	$196,677
Charlotte									
NORTH CAROLINA PERFORMING ARTS CENTER AT CHARLOTTE FOUNDATION	$1,587,134	$625,761	$1,518,156	$3,731,051	$20,841,613	$24,750,892	$24,066,979	$683,913	$11,128,368
ARTS & SCIENCE COUNCIL CHARLOTTE MECKLENBURG INC	$12,029,480	$0	$4,391,839	$16,421,319	$0	$17,603,922	$18,175,547	-$571,625	$27,163,345
DISCOVERY PLACE INC	$6,389,863	$0	$724,504	$7,114,367	$5,307,515	$13,732,983	$11,112,066	$2,620,917	$11,005,511
CHARLOTTE SYMPHONY ORCHESTRA SOCIETY INC CHARLOTTE SYMPHONY	$1,359,493	$2,084,126	$115,000	$3,558,619	$2,505,364	$6,236,124	$7,813,023	-$1,576,899	$6,730,110
MINT MUSEUM OF ART INC	$8,491,862	$1,832,019	$178,517	$10,502,398	$310,240	$10,316,685	$5,725,016	$4,591,669	$30,002,501
CHILDRENS THEATRE OF CHARLOTTE INC	$414,428	$810,491	$393,100	$1,618,019	$1,656,046	$5,250,972	$4,011,472	$1,239,500	$11,651,661
NORTH CAROLINA DANCE THEATRE	$1,128,872	$938,913	$87,500	$2,155,285	$1,735,640	$4,342,380	$3,864,677	$477,703	$1,140,126
OPERA CAROLINA	$610,795	$1,482,225	$92,500	$2,185,520	$907,787	$3,148,668	$3,121,542	$27,126	$0
MCCOLL CENTER FOR VISUAL ART	$338,616	$538,517	$590,316	$1,467,449	$192,881	$1,641,344	$2,133,572	-$492,228	$6,490,325

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Organization	Direct Support	Indirect Support	Government Grants	Total Contributed Revenue	Program Revenue	Total Revenue	Total Expenses	Net Income	Endowment
Raleigh									
INDIANAPOLIS MUSEUM OF ART INC	$16,758,921	$0	$352,984	$17,111,905	$3,656,573	$51,292,056	$41,175,665	$10,116,391	$109,597,000
CHILDRENS MUSEUM OF INDIANAPOLIS INCORPORATED	$3,529,104	$426,544	$4,516,488	$8,472,136	$7,294,298	$29,608,000	$31,237,834	-$1,629,834	$19,569,327
INDIANA SYMPHONY SOCIETY INC	$8,097,706	$9,735,485	$485,080	$18,318,271	$7,665,473	$26,644,727	$28,052,898	-$1,408,171	$0
EITELJORG MUSEUM OF AMERICAN INDIAN AND WESTERN ART INC	$439,292	$0	$3,370,192	$3,809,484	$227,581	$5,084,028	$9,558,386	-$4,474,358	$178,566
CONNER PRAIRIE MUSEUM INC	$905,426	$7,614,154	$598,113	$9,117,693	$1,653,389	$11,722,315	$9,445,470	$2,276,845	$290,712
INDIANA REPERTORY THEATRE INC	$1,921,393	$0	$256,177	$2,177,570	$3,243,758	$5,924,502	$6,403,779	-$479,277	$8,500,000
ARTS COUNCIL OF INDIANAPOLIS INC	$2,847,829	$0	$3,092,255	$5,940,084	$905	$6,117,995	$5,694,830	$423,165	$0
INDIANAPOLIS ART CENTER INC	$3,030,736	$0	$183,667	$3,214,403	$1,321,997	$4,609,188	$3,157,260	$1,451,928	$2,423,581
INDIANA OPERA SOCIETY INC INDIANAPOLIS OPERA	$0	$210,776	$0	$1,641,378	$583,225	$2,441,153	$2,201,604	$239,549	$0
Columbus									
COLUMBUS SYMPHONY ORCHESTRA INC	$5,417,143	$592,818	$0	$6,009,961	$3,711,335	$9,778,286	$10,963,780	-$1,185,494	$1,557,230
COLUMBUS ASSOCIATION FOR THE PERFORMING ARTS INC	$851,888	$0	$547,236	$1,399,124	$7,675,320	$9,460,476	$9,672,203	-$211,727	$830,060
COLUMBUS MUSEUM OF ART	$13,657,576	$712,259	$453,632	$14,823,467	$451,833	$17,421,409	$7,611,625	$9,809,784	$77,026,882

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Organization	Direct Support	Indirect Support	Government Grants	Total Contributed Revenue	Program Revenue	Total Revenue	Total Expenses	Net Income	Endowment
GREATER COLUMBUS ARTS COUNCIL INC	$550,118	$0	$4,322,671	$4,872,789	$525,607	$5,540,670	$5,341,123	$199,547	$0
BALLET METROPOLITAN INC	$4,290,528	$0	$308,761	$4,599,289	$2,337,042	$7,258,715	$4,699,214	$2,559,501	$185,318
JAZZ ARTS GROUP OF COLUMBUS	NULL	NULL	NULL	$821,278	$784,603	$2,245,823	$2,244,988	$835	$0
OPERA ASSOCIATION OF CENTRAL OHIO OPERA COLUMBUS	$552,627	$0	$187,049	$739,676	$312,095	$1,284,161	$1,388,457	-$104,296	$79,067
CONTEMPORARY AMERICAN THEATRE COMPANY	NULL	NULL	NULL	$826,995	$384,162	$1,252,429	$1,035,096	$217,333	$0
Kansas City									
NELSON GALLERY FOUNDATION	$22,523,510	$1,936,399	$437,936	$24,897,845	$722,355	$32,452,634	$40,434,041	-$7,981,407	$57,092,751
KANSAS CITY BALLET ASSOCIATION	$3,260,118	$0	$68,825	$3,328,943	$2,454,509	$6,064,917	$17,039,497	-$10,974,580	$2,634,558
UNION STATION KANSAS CITY INC	$4,303,360	$0	$1,855,812	$6,159,172	$6,092,122	$11,804,908	$16,470,869	-$4,665,961	$13,820
THEATER LEAGUE INC	$114,783	$0	$0	$114,783	$12,857,645	$13,834,837	$12,692,013	$1,142,824	$0
STARLIGHT THEATRE ASSOCIATION OF KANSAS CITY INC	$627,748	$0	$86,908	$714,656	$10,769,784	$11,961,886	$12,150,439	-$188,553	$2,624,654
KANSAS CITY SYMPHONY	$7,764,027	$0	$200,116	$7,964,143	$2,875,057	$10,941,801	$10,385,171	$556,630	$3,394,080
KANSAS CITY REPERTORY THEATRE INC	$2,452,790	$0	$0	$2,452,790	$2,621,362	$5,418,494	$6,087,448	-$668,954	$6,477,658
LYRIC OPERA OF KANSAS CITY INC	$2,907,716	$0	$55,000	$2,962,716	$776,312	$4,316,498	$4,269,342	$47,156	$7,292,027
AMERICAN JAZZ MUSEUM	$627,076	$0	$801,539	$1,428,615	$634,575	$2,419,511	$2,240,478	$179,033	$830,894

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Organization	Direct Support	Indirect Support	Government Grants	Total Contributed Revenue	Program Revenue	Total Revenue	Total Expenses	Net Income	Endowment
Cleveland									
CLEVELAND MUSEUM OF ART	$60,289,847	$0	$2,737,866	$63,027,713	$813,250	$99,111,432	$49,718,955	$49,392,477	$385,620,044
THE MUSICAL ARTS ASSOCIATION	$13,325,613	$2,404,244	$734,222	$16,464,079	$16,120,721	$47,350,846	$44,639,360	$2,711,486	$92,848,964
PLAYHOUSE SQUARE FOUNDATION	$6,893,564	$0	$399,608	$7,293,172	$22,903,446	$27,152,126	$28,518,991	-$1,366,865	$4,266,988
ROCK AND ROLL HALL OF FAME AND MUSEUM INC	$6,979,377	$3,000,000	$2,778,734	$12,758,111	$7,239,134	$24,632,031	$16,880,565	$7,751,466	$0
CLEVELAND MUSEUM OF NATURAL HISTORY	$10,067,797	$0	$0	$10,067,797	$2,192,847	$33,480,270	$10,861,983	$22,618,287	$72,501,303
GREAT LAKES MUSEUM OF SCIENCE ENVIRONMENT AND TECHNOLOGY	$2,692,290	$0	$1,329,479	$4,021,769	$2,185,928	$7,595,640	$9,390,924	-$1,795,284	$8,501,385
CLEVELAND PLAY HOUSE	$2,505,383	$0	$224,644	$2,730,027	$3,407,077	$7,861,250	$9,021,403	-$1,160,153	$4,533,805
GREAT LAKES THEATER FESTIVAL INC	$4,155,857	$0	$65,534	$4,221,391	$1,229,758	$5,743,243	$3,282,653	$2,460,590	$425,000
MUSEUM OF CONTEMPORARY ART CLEVELAND	$3,356,735	$0	$49,782	$3,406,517	$106,579	$3,858,244	$1,779,926	$2,078,318	$222,109
CLEVELAND RESTORATION SOCIETY INC	$1,054,377	$0	$265,903	$1,320,280	$147,005	$1,541,462	$1,160,073	$381,389	$945,380
OPERA CLEVELAND	$548,612	$0	$40,443	$589,055	$149,425	$832,481	$1,087,136	-$254,655	$1,017,124
Cincinnati									
CINCINNATI SYMPHONY ORCHESTRA	$9,613,329	$4,258,333	$3,693,498	$17,565,160	$26,738,440	$43,771,329	$45,184,545	-$1,413,216	$60,146,239

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Organization	Direct Support	Indirect Support	Government Grants	Total Contributed Revenue	Program Revenue	Total Revenue	Total Expenses	Net Income	Endowment
CINCINNATI MUSEUM CENTER FOR NATURAL AND CULTURAL HISTORY AND	$3,775,798	$0	$4,719,154	$8,494,952	$10,469,450	$22,266,940	$20,923,746	$1,343,194	$6,983,307
CINCINNATI INSTITUTE OF FINE ARTS	$13,113,552	$0	$0	$13,113,552	$18,893	$15,414,270	$14,466,061	$948,209	$9,820,028
CINCINNATI MUSEUM ASSOCIATION	$5,389,801	$1,992,366	$204,307	$7,586,474	$1,526,759	$15,656,479	$13,543,262	$2,113,217	$75,936,188
CINCINNATI ARTS ASSOCIATION CINCINNATI MUSIC HALL ASSOCIATION	$1,308,343	$0	$0	$1,308,343	$9,075,145	$11,927,330	$12,553,007	-$625,677	$7,782,136
CINCINNATI PLAYHOUSE IN THE PARK	$1,517,508	$1,204,592	$131,315	$2,853,415	$6,903,942	$9,232,127	$10,694,104	-$1,461,977	$898,261
CINCINNATI BALLET COMPANY INC	$2,068,361	$993,693	$119,875	$3,181,929	$2,390,706	$5,891,671	$6,209,939	-$318,268	$115,207
CINCINNATI OPERA ASSOCIATION	$1,867,944	$1,295,776	$20,316	$3,184,036	$1,605,239	$5,817,095	$6,123,083	-$305,988	$8,363,684
TAFT MUSEUM OF ART	$4,547,107	$0	$73,142	$4,620,249	$437,608	$7,353,916	$4,901,886	$2,452,030	$3,874,495
CONTEMPORARY ARTS CENTER	$2,077,433	$539,351	$106,121	$2,722,905	$273,772	$4,901,620	$4,617,004	$284,616	$4,270,573
Portland									
OREGON MUSEUM OF SCIENCE AND INDUSTRY	$3,286,762	$28,563	$1,172,264	$4,487,589	$10,693,044	$27,139,357	$20,516,268	$6,623,089	$881,713
PORTLAND ART MUSEUM	$8,687,219	$0	$42,000	$8,729,219	$2,055,752	$13,037,355	$14,990,520	-$1,953,165	$31,381,918
OREGON SYMPHONY ASSOCIATION	$6,143,412	$0	$170,895	$6,314,307	$6,101,725	$14,456,365	$14,460,619	-$4,254	$17,489,640
PORTLAND OPERA ASSOCIATION INC	NULL	NULL	NULL	$5,916,746	$3,241,233	$10,619,705	$7,967,514	$2,652,191	$0

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Organization	Direct Support	Indirect Support	Government Grants	Total Contributed Revenue	Program Revenue	Total Revenue	Total Expenses	Net Income	Endowment
OREGON BALLET THEATRE	$1,782,529	$0	$22,089	$1,804,618	$3,108,690	$4,197,738	$6,147,040	-$1,949,302	$10,000
REGIONAL ARTS & CULTURE COUNCIL	$238,084	$0	$4,389,406	$4,627,490	$437,161	$5,165,591	$4,880,209	$285,382	$0
PORTLAND CENTER STAGE	$2,040,989	$0	$76,739	$2,117,728	$2,420,844	$4,605,873	$4,767,982	-$162,109	$15,500
PORTLAND CHILDRENS MUSEUM	$1,338,018	$0	$350,962	$1,688,980	$946,025	$3,121,196	$2,808,190	$313,006	$0
ARTISTS REPERTORY THEATRE	$1,156,797	$0	$52,400	$1,209,197	$1,357,364	$2,669,537	$2,383,444	$286,093	$0
OREGON CHILDRENS THEATRE COMPANY	$350,331	$0	$0	$350,331	$1,365,158	$1,746,834	$1,687,018	$59,816	$0
YOUNG AUDIENCES OF OREGON INC	$919,617	$0	$0	$919,617	$411,908	$1,332,516	$1,527,513	-$194,997	$0
CHAMBER MUSIC NORTHWEST	$791,998	$0	$65,270	$857,268	$453,686	$1,425,153	$1,214,158	$210,995	$1,808,718
San Diego									
OLD GLOBE THEATRE	$8,938,668	$0	$998,353	$9,937,021	$11,578,593	$22,250,419	$19,846,613	$2,403,806	$1,494,720
SAN DIEGO SOCIETY OF NATURAL HISTORY BALBOA PARK	$5,923,920	$0	$548,535	$6,472,455	$14,281,447	$23,001,825	$19,270,104	$3,731,721	$10,459,123
SAN DIEGO OPERA ASSOCIATION	$8,582,587	$217,562	$890,352	$9,690,501	$7,198,868	$17,227,766	$17,198,150	$29,616	$8,141,722
SAN DIEGO SYMPHONY ORCHESTRA ASSOCIATION	$8,646,051	$1,974,852	$538,774	$11,159,677	$6,451,117	$17,370,157	$17,161,655	$208,502	$1,022,886
THEATRE & ARTS FOUNDATION OF SAN DIEGO COUNTY	$4,057,384	$0	$484,871	$4,542,255	$6,365,485	$13,973,835	$14,334,210	-$360,375	$4,432,483
SAN DIEGO MUSEUM OF ART	$4,887,047	$0	$412,345	$5,299,392	$969,334	$6,091,505	$10,315,605	-$4,224,100	$10,648,835

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Organization	Direct Support	Indirect Support	Government Grants	Total Contributed Revenue	Program Revenue	Total Revenue	Total Expenses	Net Income	Endowment
MUSEUM OF CONTEMPORARY ART SAN DIEGO	$6,228,445	$0	$674,444	$6,902,889	$101,446	$12,524,496	$7,833,480	$4,691,016	$39,285,443
LAMBS PLAYERS THEATRE	$760,667	$0	$0	$760,667	$3,052,189	$3,770,411	$4,110,536	-$340,125	$0
SAN DIEGO THEATRES INC	$0	$0	$0	$0	$4,048,629	$4,192,223	$3,681,126	$511,097	$0
LA JOLLA MUSIC SOCIETY	$0	$0	$211,378	$1,129,382	$875,137	$2,258,267	$3,068,200	-$809,933	$1,178,281
SAN DIEGO REPERTORY THEATRE INC	NULL	NULL	NULL	$1,342,685	$986,077	$2,873,159	$2,810,539	$62,620	$0
SAN DIEGO AIR & SPACE MUSEUM	$538,404	$0	$149,317	$687,721	$1,463,659	$2,574,682	$2,762,765	-$188,083	$0
SAN DIEGO MUSEUM OF MAN	$822,978	$0	$232,164	$1,055,142	$594,879	$2,167,537	$2,427,797	-$260,260	$0
LYRIC OPERA SAN DIEGO	$764,318	$350,360	$53,562	$1,168,240	$6,302	$1,747,052	$2,333,672	-$586,620	$0
Minneapolis									
SCIENCE MUSEUM OF MINNESOTA	$6,320,302	$0	$7,614,822	$13,935,124	$18,229,302	$38,669,678	$34,677,398	$3,992,280	$16,698,139
GUTHRIE THEATRE FOUNDATION	$7,407,244	$0	$482,110	$7,889,354	$14,487,615	$27,505,070	$33,916,329	-$6,411,259	$26,240,958
MINNESOTA ORCHESTRAL ASSOCIATION	$20,846,092	$0	$662,604	$21,508,696	$10,160,699	$39,686,112	$32,697,219	$6,988,893	$146,097,616
MINNEAPOLIS SOCIETY OF FINE ARTS	$11,731,974	$0	$10,964,580	$22,696,554	$1,696,826	$44,885,269	$32,028,908	$12,856,361	$127,124,974
WALKER ART CENTER INC	$14,885,286	$0	$669,567	$15,554,853	$3,434,143	$31,527,604	$26,162,234	$5,365,370	$73,935,179
HENNEPIN THEATRE TR	$2,696,105	$0	$0	$2,435,027	$19,629,647	$22,326,399	$22,244,616	$81,783	$0
ORDWAY CENTER FOR THE PERFORMING ARTS	$4,442,200	$400,000	$301,500	$5,143,700	$12,450,000	$18,631,800	$18,460,100	$171,700	$14,291,600
CHILDRENS THEATER COMPANY AND SCHOOL	$6,337,155	$0	$486,687	$6,823,842	$5,825,126	$13,234,708	$12,842,146	$392,562	$4,282,343

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Organization	Direct Support	Indirect Support	Government Grants	Total Contributed Revenue	Program Revenue	Total Revenue	Total Expenses	Net Income	Endowment
SAINT PAUL CHAMBER ORCHESTRA SOCIETY	$10,421,597	$0	$0	$10,421,597	$2,671,943	$16,468,476	$12,710,979	$3,757,497	$38,702,473
THE MINNESOTA OPERA	$6,197,390	$0	$223,843	$6,421,233	$2,661,402	$11,623,870	$9,035,436	$2,588,434	$20,256,669
MACPHAIL CENTER FOR MUSIC	$3,139,623	$0	$1,026,593	$4,166,216	$4,945,866	$9,175,065	$8,245,624	$929,441	$1,199,485
MINNESOTA CHILDRENS MUSEUM	$1,818,807	$0	$549,000	$2,367,807	$2,363,224	$6,118,140	$5,832,331	$285,809	$4,161,753
SAINT PAUL CONSERVATORY FOR PERFORMING ARTISTS	$78,105	$0	$3,153,247	$3,231,352	$91,161	$3,322,513	$3,284,446	$38,067	$0

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