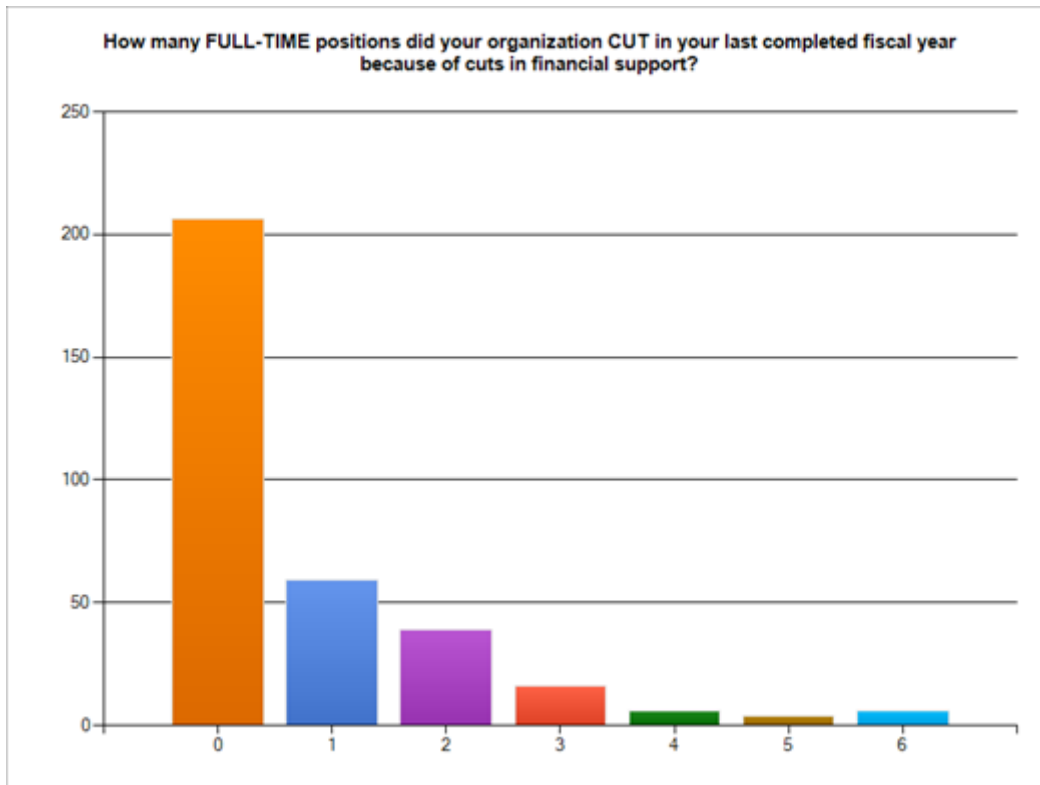
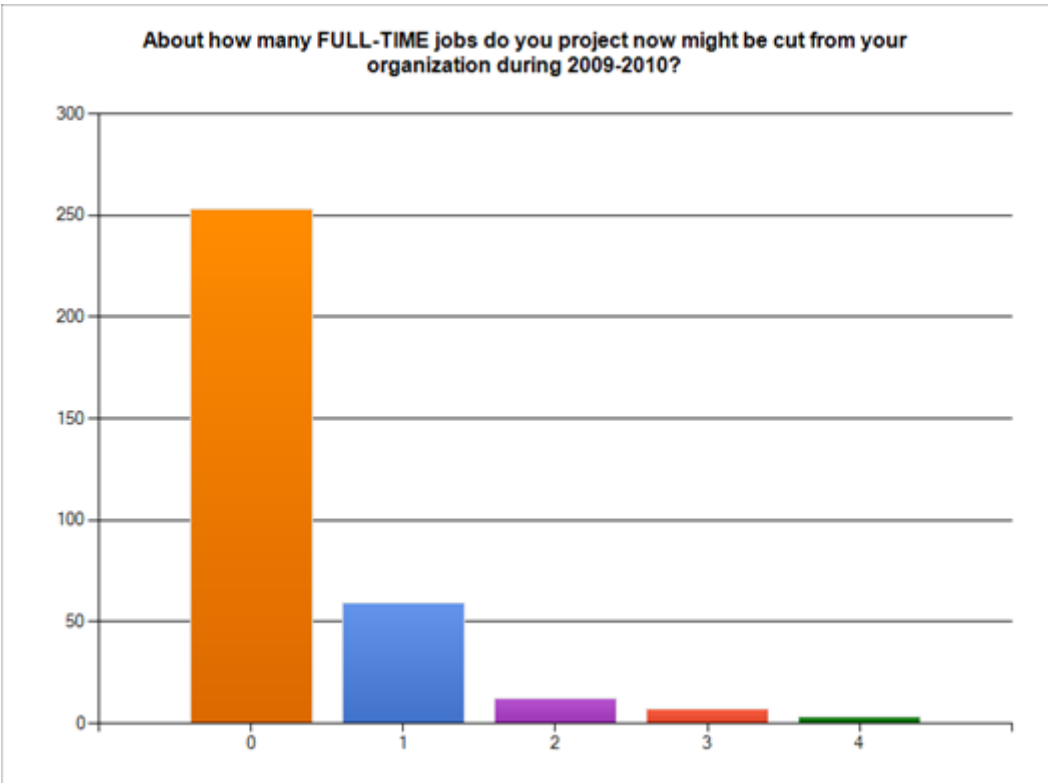
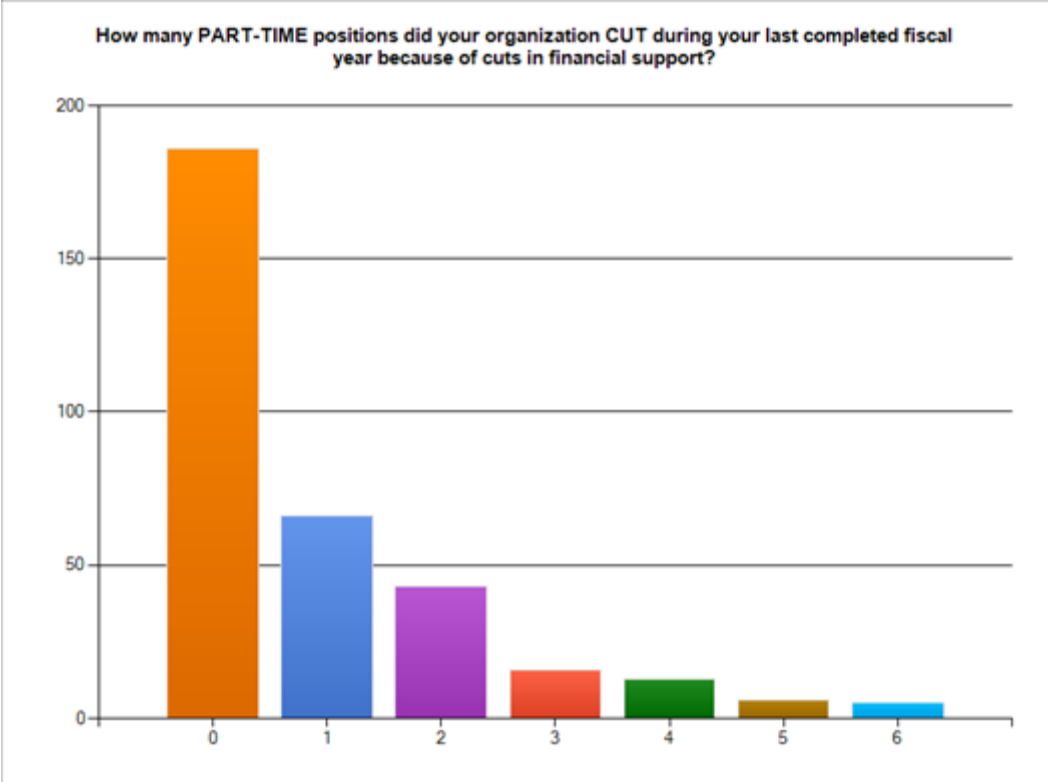


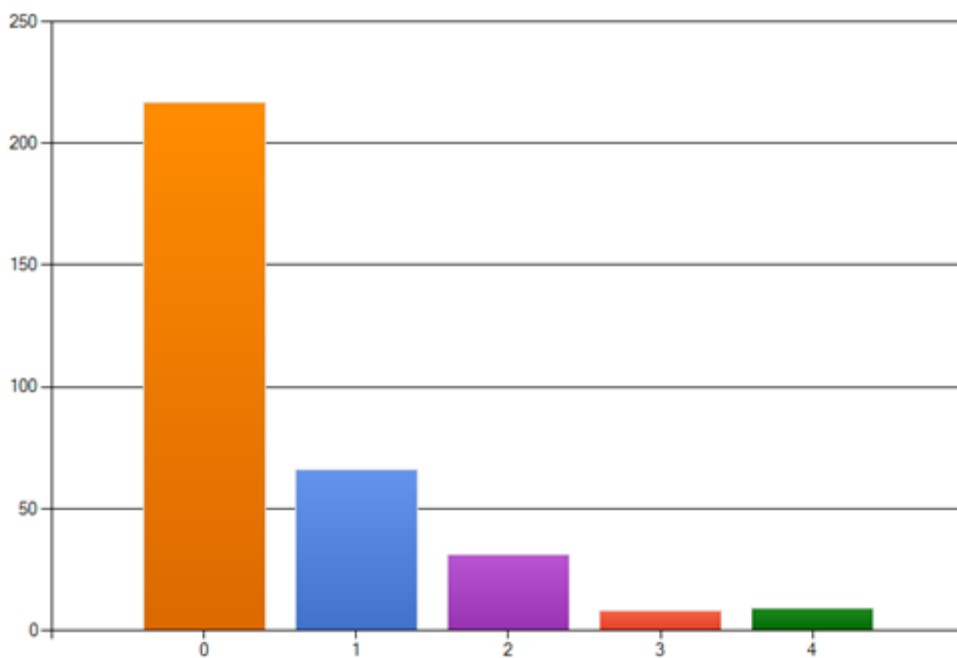
# Preliminary Results of Impact of Local and State Cuts and The Weak Economy on Florida's Arts and Culture Organizations December 2009

Results reflect responses from 344 organizations

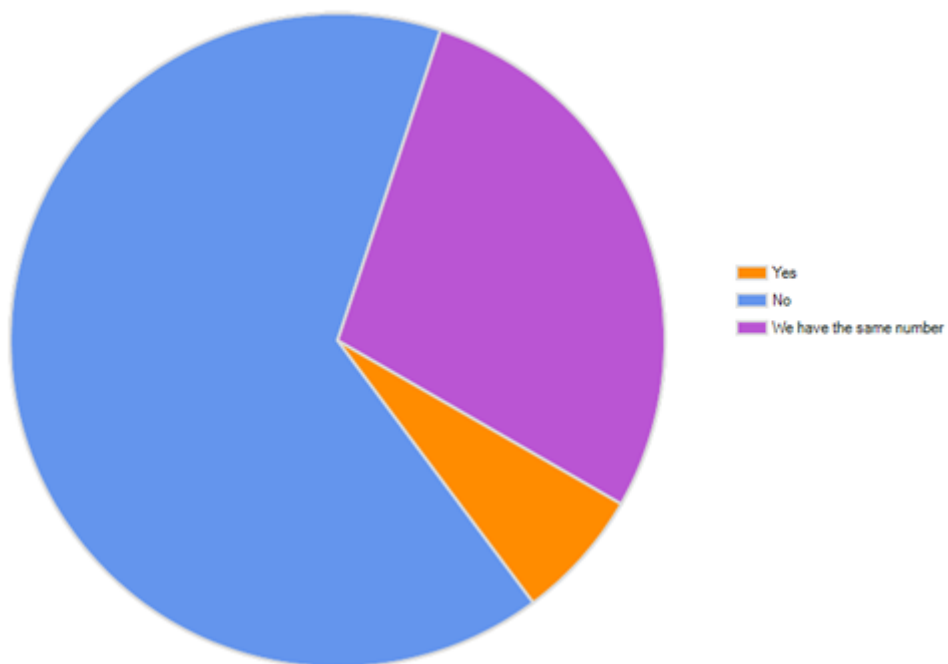




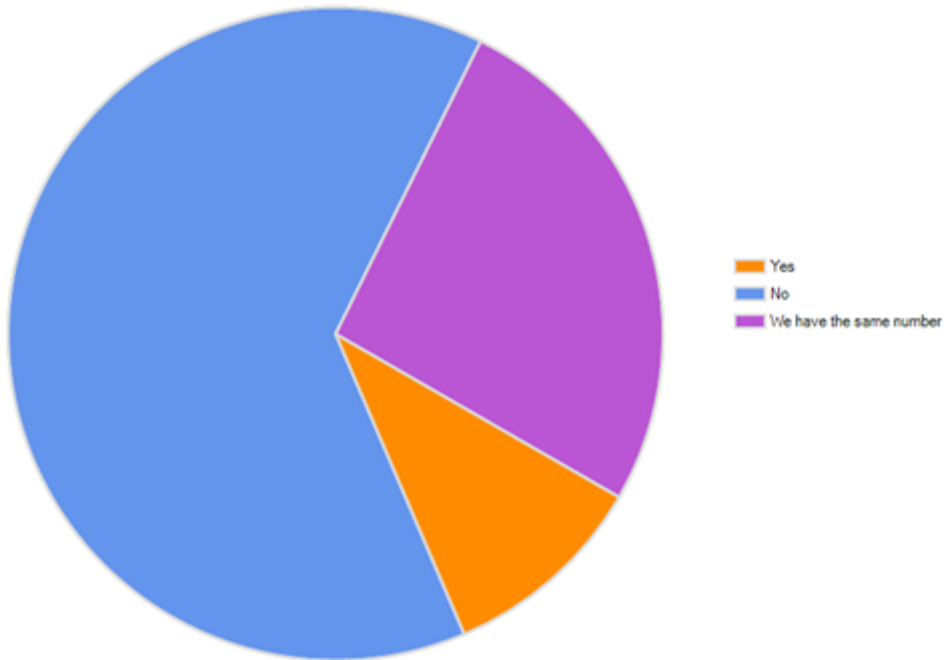
**About how many PART-TIME jobs do you project now might be cut from your organization during 2009-2010?**



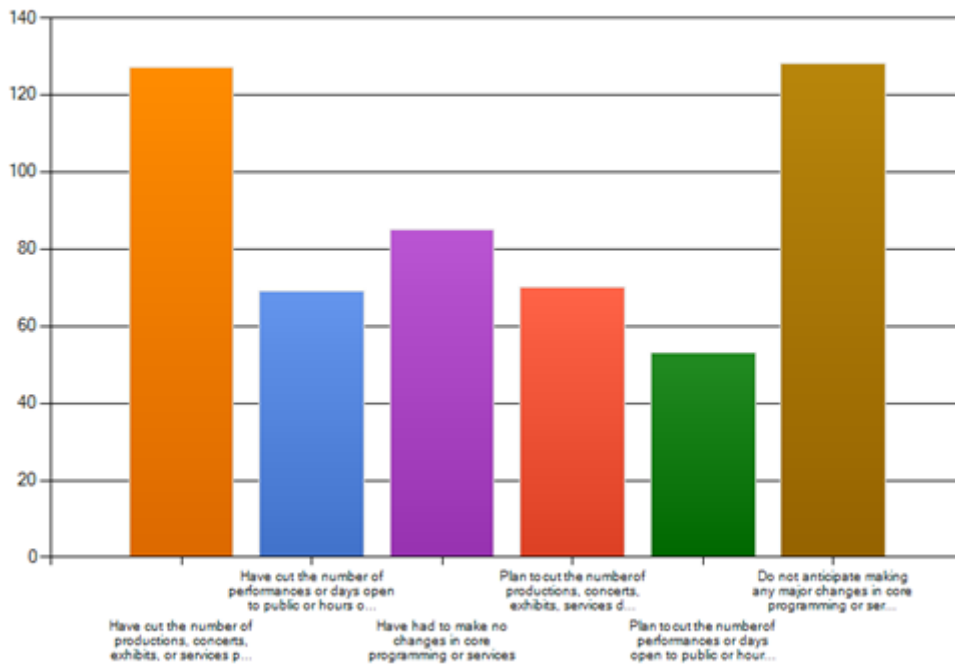
**Does your organization have more full-time people on staff now than this time last year?**



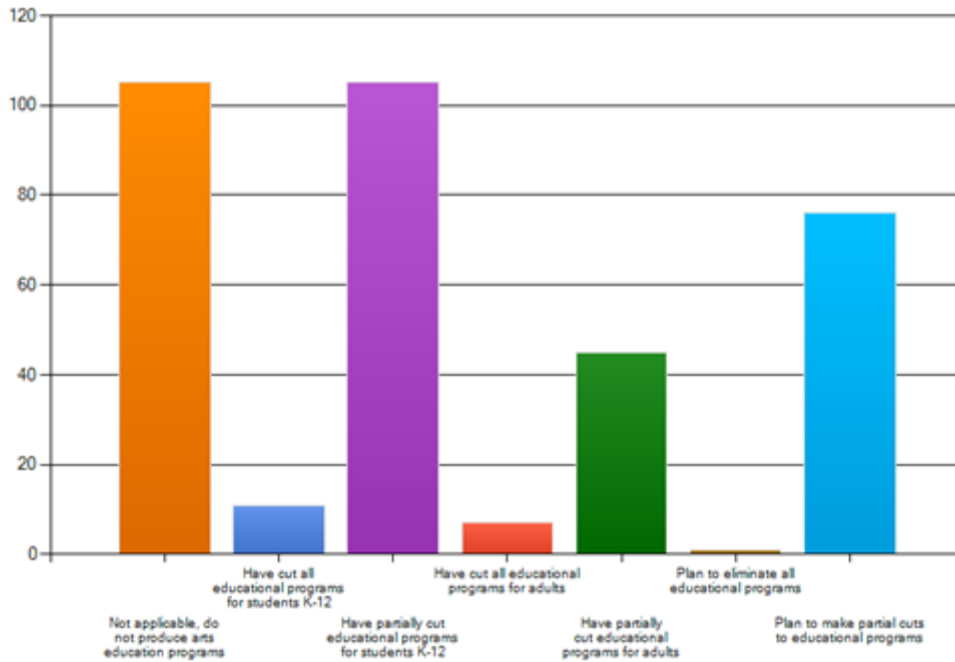
Does your organization have more part-time people now on staff than this time last year?



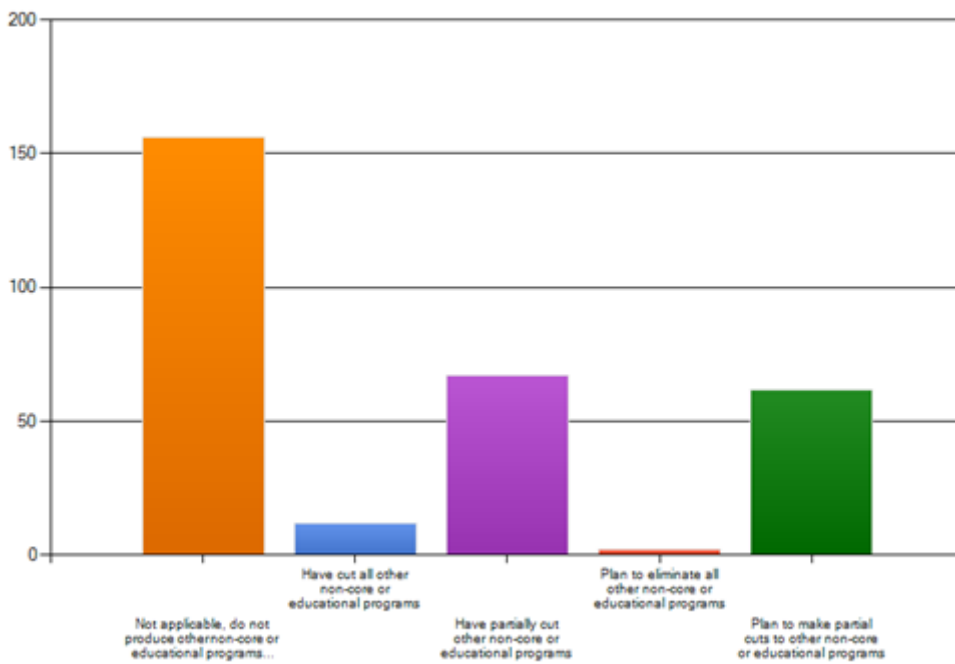
What is the status of your organization's core/main programs or services, not your outreach or arts education programs? Please CHECK ALL THAT APPLY:



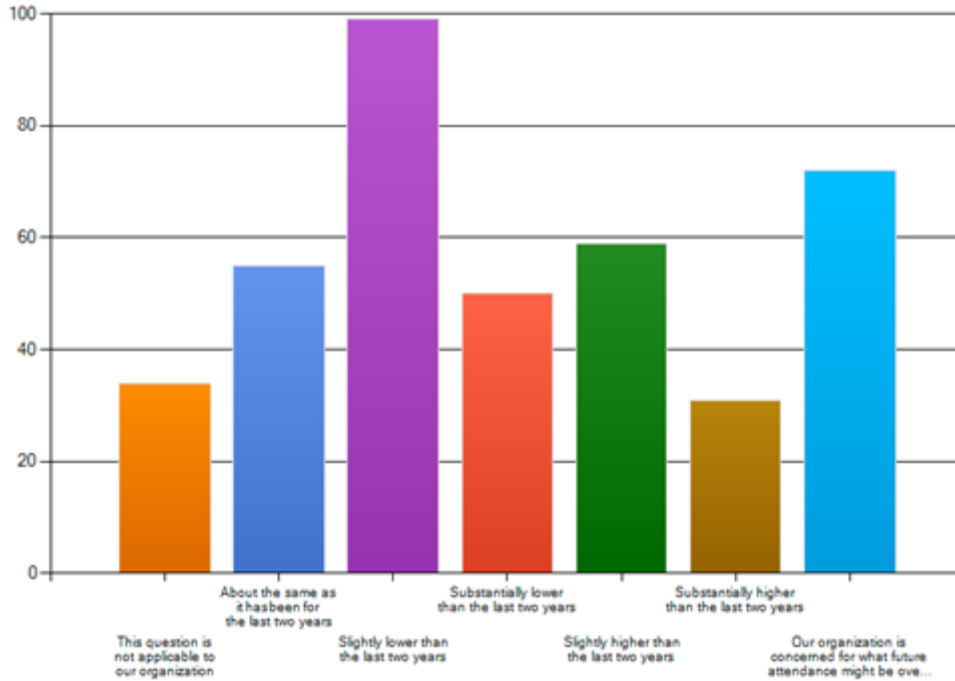
**What is the status of your organization's arts education programs, not your core programming?  
Please CHECK ALL THAT APPLY:**



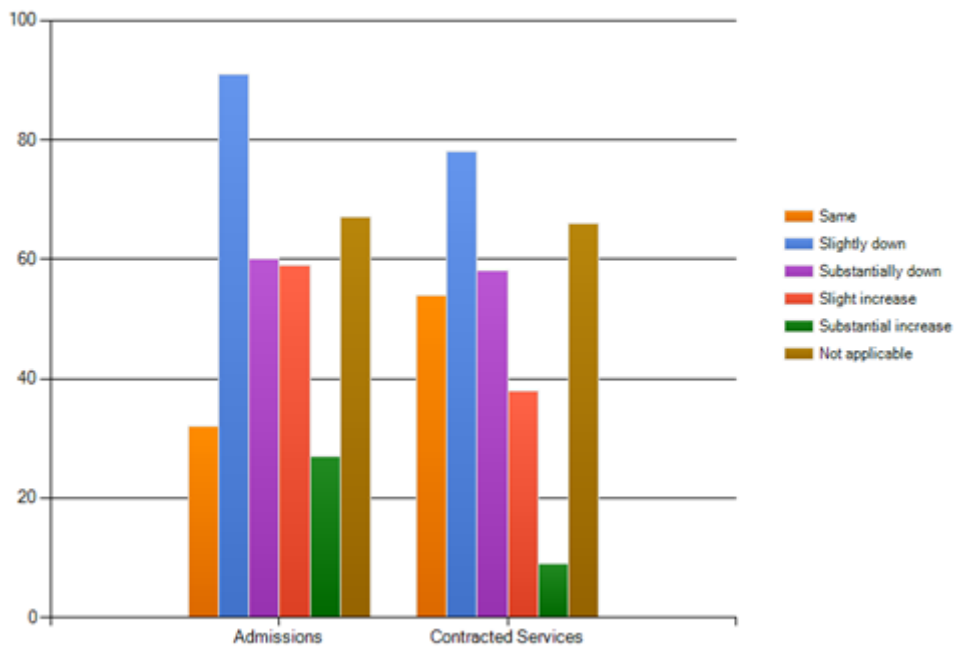
**What is the status of your organization's OTHER (not core or educational) programs?  
Please CHECK ALL THAT APPLY:**



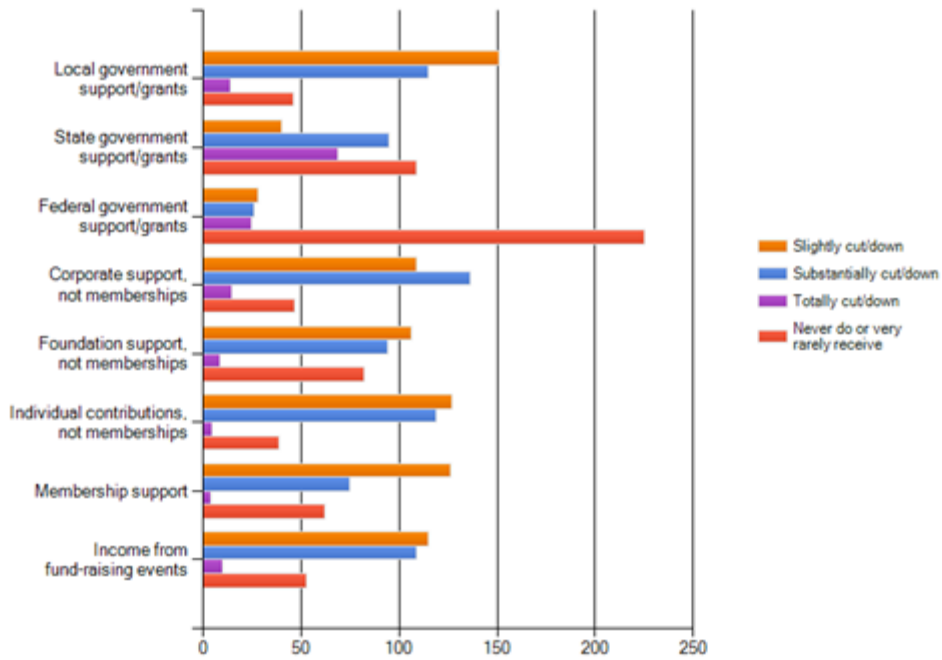
**What is the status of attendance for all of your organization's programs?**



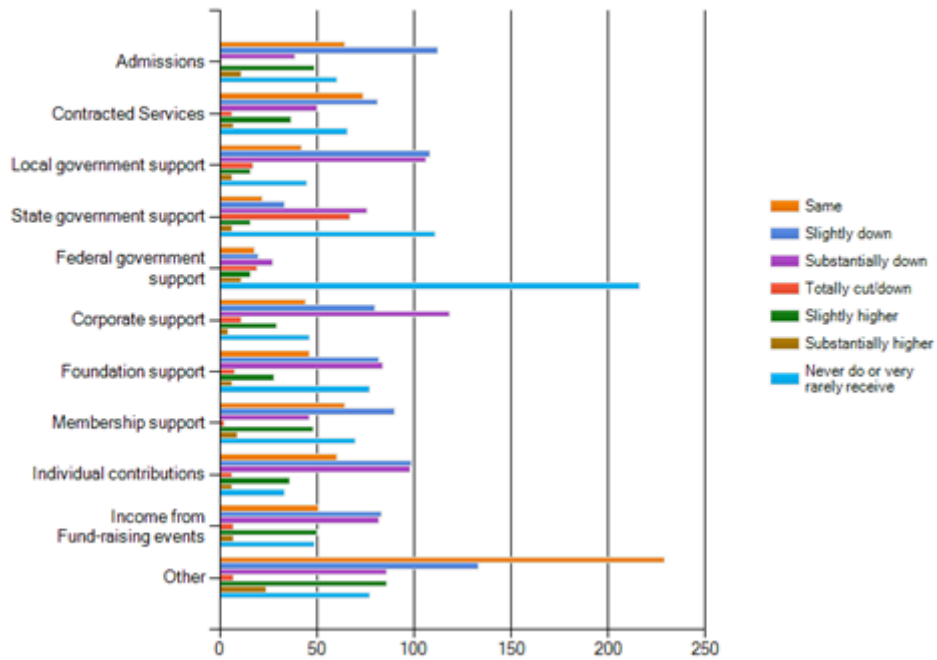
**How did your organization do in its last completed fiscal year compared to its previous fiscal year in the categories of admissions and contracted services?**



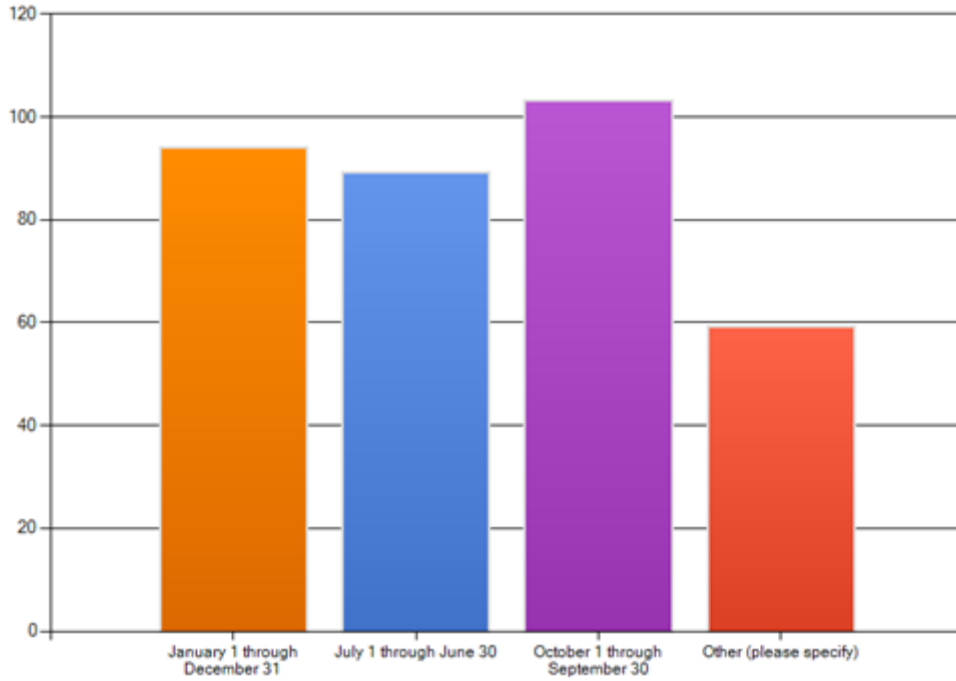
**How did your organization do in its last completed fiscal year in the following income categories compared to its previous fiscal year?**



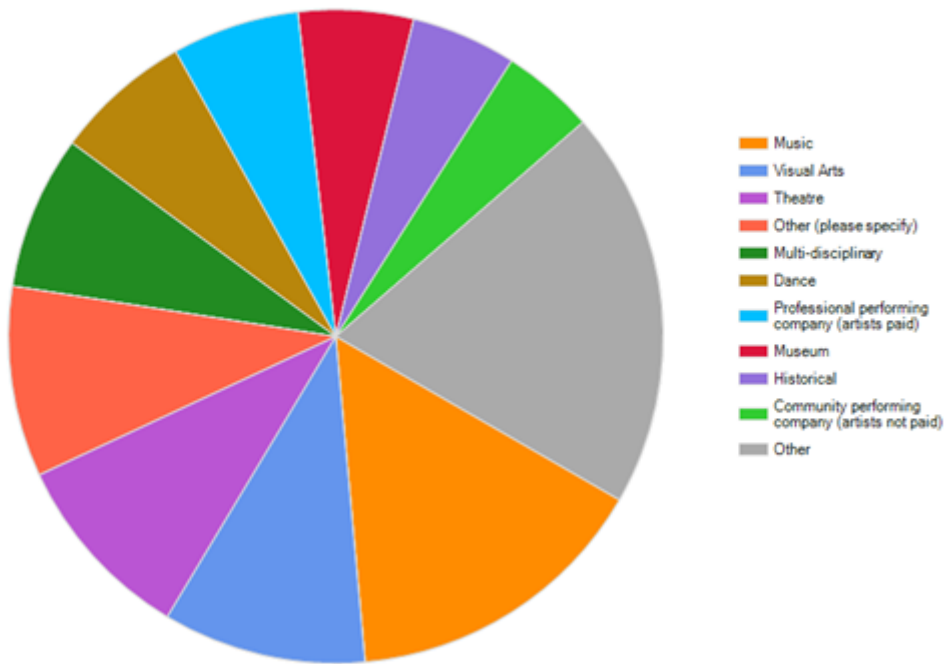
**What does your organization anticipate during your 2009-2010 operations when compared to your last completed fiscal year?**



**What is your organization's fiscal year?**



**Please classify your organization? Please CHECK ALL THAT APPLY:**



OPTIONAL: If there are other major changes these challenging economic times and grant cuts are having on your organization, please briefly describe below:

1. no cost of living or merit increases, earlier and longer lay-off
2. The Museum merged into University July 2008
3. We are definitely in a "survival mode." Members continue to support our chorus, but membership has dropped, in part due to the hard times. We are doing everything we can to keep going. The News Media has kept us alive this year, particularly the Herald-Tribune and the Gondolier-Sun organizations.
4. We have had to re-evaluate ticket pricing, offering lower prices and package incentives when possible.  
We are relying more on word of mouth to advertise our organization and its programs.
5. The general maintenance of properties.
6. STRUGGLING AND SEEKING GRANTS FROM ALL SOURCES TO INCLUDE: PUBLIC AND PRIVATE FUNDING
7. The 2009-10 season is our started as our worst financial season in our 27 year history. We have been forced to cut salaried positions and rather than hire extra actors the office staff has been performing as well as doing administrative work. We have managed to keep our head above water because we have taken any gigs that came our way. It has created havoc and the staff is becoming exhausted and we are still down \$200,000.00 from last year.
8. We are a new organization and have not been able to file for grants etc. as of yet. We anticipate doing so in 2010.
9. We applied for some small grants, but not positive response because of the present economic situation, there is not enough money.
10. Losing staff and programming
11. Our administrative staff was already too small to accomplish our work load. We have lost 2 positions, invaluable to our organization, and hope to see a change in the economy very soon. It is necessary for organizations to cut staff due to budget short falls, but it is only a matter of time before it affects the children they serve, the community they entertain and State they represent.
12. Our biggest challenge has always been in generating operating support for occupancy and professional staffing, but this year our executive director's position was cut from full-time to just 12 hours per week and our two half-time support positions were cut to 1/4-time each. While we were challenged before by a miniscule staff to manage a county-wide arts council, our capacity is now severely compromised. The immediate and anticipated impact on our effectiveness and credibility are major concerns.
13. I am not hiring guest artists at the price that I had paid last year. I'm watching every penny. I don't know what is going to happen.
14. Because we are a much underserved County it is difficult to find funding for general support, we have one paid staff and use volunteers for much of our programming. We have faced local budget cuts, the pool of large corporations in Putnam County is small and the amount of organizations requesting support is large. With those companies all facing cuts it means loss of funding to the non profits. If it were not for the stimulus grant for salary we received this year, we definitely would be in jeopardy. Lack of general support from the state has made a deep impact on our organization.

15. A number of us, as small arts organizations, are beginning to collaborate more-- exchanging ads in program books, joint advertising, sharing part time personnel, and above all, exchanging ideas!

16. Actually we're being penalized because we're doing too well. We can't execute objectives on our long range plan because grant money that might otherwise be available, is being granted to organizations that show more need. We were denied two grants because we were told that other organizations needed them more.

17. So of the questions did not apply to our Retail store.

18. Several areas in our operations are being impacted by the financial situation

-Attendance : Artists are neglecting their rehearsals,

-Expenses being reduced to the bone because of lack of outside support

-productions being delayed

-The public is mostly the victim

-Arts are not progressing.

19. Major management reorganization

20. While we did not lose a full time position in the last fiscal year, we did lose one in the previous year and are now unable to replace it, due to economic factors, leaving one position to do the work of 2-3 people. Part time is very iffy and hopefully we will be able to maintain it or increase the amount of money available for part-time employees.

21. A major corporate gift was withdrawn after last fall's meltdown. We are hoping it may be coming back if the economy improves. We are asking more and slightly more individuals in the \$100 to \$500 bracket are taking out memberships. The state is a complete loss for the last 4 years and I would guess another 4 or 5 years to come. We have been approved for peer review funding only to have the legislature eliminate us. Hopefully we may get some federal funding in the future.

22. The grant cuts have a proportional fiscal effort on our ability to provide our services.

23. We have cut our children's theater field trip performances in half this year, which is devastating to our organization. Funding for Hillsborough County schools transportation has also been limited, therefore hurting our organization as well. If the schools have no transportation, they are not able to see live theater in our venue. By the performers going to the schools, this takes away from the entire live theatrical experience.

24. We are on hiatus while our new building is being built. We will reopen in February 2010

25. In the Art Department, the number of full-time, tenure track professors has been cut from 9 to 5 over the past three years. Adjunct professors now fill these lost positions.

26. Performance sites all have drastically raised their rental rates.

27. The effort to receive state grants is more complicated while the prospect of receiving grants is less likely.

28. It seems that the press is less likely to put our information out to the public as they rely more and more on paid advertisements. Even as a not for profit, we have to beg for news space and reviews.

29. Less money for people to spend, they are thinking more about their purchase, selling more small stuff, rather than large more expensive items. I having to do business differently and teaming up with other businesses.

30. Have not been able to make the part time position full time, and have had to cut member benefits, and non-essential programs.

31. It is difficult to manage the most rudimentary administrative needs; we have very little staff to manage evaluation of programs for grant reporting, etc.

32. Our Arts and Education programs for schools have long been a labor of love. In recent years we have won sufficient grant funding to bring us to the point of opening our beautiful Resource Center this past year. Through these grants we were able to pay a nominal salary for our Operations Manager to oversee both the Cultural Museum and our very successful Mobile Museum which was completed in 2007. Now we have reached a point where our forward momentum is at a stand still for lack of funding. By necessity, we will stay our path even if we must return to the simple programs of the past and we still maintain one of the best educational resource websites

33. Affordable venues are VERY hard to come by. Community theatre programs such as ours are dependent on the availability and affordability of performance space. Rents are frequently out of reach. The survey asks about paid staff. We have none (all-volunteer organization), and so we reported no cuts in 34. Many of our patrons are older folks on fixed incomes. They are not purchasing tickets or attending fundraising events due to loss of income.

35. Ability to hire musicians to accompany our group. Ability to advertise concerts.

36. Budget cuts caused the reduction of grant awards to our organizations. We were able to make up some of the funding due to the receipt of a NEA/ARRA grant.

37. We are still able to do the 'quirky' and unusual plays that we find so challenging as artists because of our 60 seat, black box theatre, but we can no longer do any straight plays on the main stage and expect them to make very much. In hard times, people like to sing, dance and be happy. The big musicals are drawing excellent audiences, but all other programs are suffering.

We gave 3 scholarships to our youth program last season. This year we have given 8 to date and expect more requests during our next session.

38. We will have to also downsize on our space. Won't be able to afford the rent. Will have to find a smaller space for office and look at public venues for performances.

39. We were preparing to hire our first staff member but are not able to do so because of funding cuts. This position was seen as critical to alleviating our volunteer board, which has been completely shouldering the day to day duties of our organization since its inception. It is now very difficult to determine when we may have the opportunity and funding to bring in an employee.

40. I think we are a bit of an exception. We have managed to keep programming and funding levels about the same because of careful budgeting, innovative fundraising efforts and identifying new donors. We have also been so supportive of our artists in the past, that many have donated their concert fees this year to support our Festival. Our overhead is low (home offices) and there is only one full-time paid administrator who does almost everything - from grant writing, to web design, to marketing & advertising - "in-house" (literally). Yet we present almost a full season of programming at major venues on an annual budget of around \$250K.

41. We are a volunteer member band 501(c)3 organization with no paid staff. We have cut our performances due to lack of available members due to work schedules and the fact that fewer venues are available to us to perform.

42. Our Arts Council has, in the past, provided 2-5 state touring programs per year for students from Grades 1 - 8 grades. In order to serve students from two schools located in

the county, the students are bused to the Civic Center for morning and afternoon shows. These programs have included various artists from the roster of the State Touring Program. Due to budget cuts, these programs are no longer available to the students, as our Council does not have adequate funds to cover the entire cost of these programs.

43. In common with the other small professional theatres in our community we're doing surprisingly well. This might be because we are more affordable than the performing arts center and offer a stronger sense of community and uniqueness; or it may simply be that we are growing in any case. Who knows what the rate of growth would be under more favorable economic conditions? Hard to say.

44. Hoped-for funding from Prime Time Palm Beach County did not happen because of funding that they lost from the now-defunct Picower Foundation and the Knight Foundation. They took our proposal to their board to see if there was any additional funding that might be obtained for us, but because of these losses, they could not help us. This was a \$34,000 proposal that we were fairly sure was going to be awarded, and was not.

45. Due to reductions in grant funding, marketing initiatives have had to be reevaluated and in some instances discontinued. As well as a reduction in exhibits and lecture series and course offerings. Furthermore, our four major special events have been reduced to three.

47. When our event comes around we the Hispano-Latino serve as an advocate for diversity and education while providing the necessary resources a stronger cultural presence in our communities, school, and government. The grants help us with the entertainment fee and to be able to show our cultural , which is Hispano- Latino. Grants help to have our event to be able to raise money for Scholarships for the Hispanic children in our area of Palm Beach County coming out of high school to be able to go to a College/University.

48. Not enough publicity or money for publicity and marketing.

49. We are unable to support an additional staff position that would be a Technical Director for mounting productions. These job duties are being carried by our Artistic Director and to some extent, with assistance from free-lance subcontracted designers.

50. Raising funds - corporate and individual - has become extremely difficult.

51. Funding for students attending our University are very limited which is causing a decline in student population. Several loan options have been completely cut.

52. Ironically, the reduction in local and state grants, in addition to reducing operating income and program support, establishes a justification for reduced private funding.

This is demonstrated by our failure to inspire new private gifts by explaining the effect of the loss of the grant funds. Private sources are non-responsive and state that private fund sources are facing the same conditions as the grant sources because of reduced investment returns and the need for preservation of capital.

53. Children learn through the arts. I am most grateful for the two decades of writing and producing musical docudramas for children with the help of grants that made this mission possible. I would be most grateful if I could continue to do this in order to help build a better world ...a world of transcendent wisdom and universal compassion. I use the arts for this purpose and do appreciate the funding I receive through grants.

54. Due to the H1N1 outbreak last year and the economic times, our attendance to events and sponsorship has taken a dramatic hit these past two years.

55. As mentioned above, we have a Miami Nice Capacity Building grant that is to help us build a total strategic plan including funding development for the future. It is our hope that this plan will carry us through this economic downturn and have us in a more stable place for the future. I just hope we can make it through without going "belly up" before our funds run out.

56. It is difficult to contract big name bands (which could increase ticket sales) because of shortage of funding through local Grants and uncertainty of the economy. Which is more important, continuity of a 40 year old organization or spend everything we have on one yearly festival? Our monthly fundraising festivals have fallen short due to a recent change of venue and loss of admission revenue at the new venue.

57. In order to maintain programming commitments, DNE drastically cut weeks of work for the performing artists from 24 to 13 and has cut the paid administrative position of one of the directors.

58. Lower income means no budget for advertising or promotion, which in turn leads to reduced participation in fundraising activities and reduced admissions. A vicious cycle.

59. Using a less desirable but cheaper venue for some concerts

60. We entered into the purchase of a property in 2007 involving a large mortgage, just before the crisis began, making it now extremely challenging to maintain the facility.

61. In the future, we may have to cut certain lectures due to uncertainty in receiving grant money for honoraria to these performers.

62. The loss of jobs and the increase in the price of gas have been the largest reasons for the decline in class attendance according to our survey here at my studio. Students who lose their day jobs cannot afford to take class. Class attendance has plummeted which results in teachers losing their jobs. This is the most dangerous thing of all to me. I have watched the consistent loss of sophistication of forms and the disintegration of technique and loss of even the most rudimentary skills required to fulfill artistic levels. This loss of study results in erosion of the arts, re-invention of the wheel and loss in audience.

Students cannot study, and teachers have nowhere to teach. South Florida is very spread out and vehicle reliant, and without any real functioning mass transit to allay the costs, the students are left with very few options. I also support as many as 20 small performing groups, young choreographers and artists who have the same problem. If artists cannot stay together long enough to develop, their chances of working are greatly lessened.

63. These cuts are affecting the number of scholarships and children with special needs that we can serve throughout our music, visual arts and science/art camps. Parents are unable to afford the cost of quality programming for their child.

64. We receive rent from various sources. The rent from the building above our theater is no longer coming in to the revenue.

The show rental market is dying. No one wants to take the risk. We have spent dollars grant writing for 3 state grants that were approved, and the state cut them from their budgets. It is difficult when you spend resources on projects that don't get funded. We are moving forward creating a presenting business model and we are going to raise whatever we need to survive and ultimately thrive.

65. Our piano competition will be presented with much smaller number of accompanying events, social events will be cut down as well. We are cutting down on printing and mailing costs, as well as on marketing and PR.

66.I'VE HAD TO GO OUTSIDE OF THE UNITED STATES TO MAKE MONEY. FOR EXAMPLE; I'VE BOUGHT DISNEY'S HIGH SCHOOL MUSICAL AND SOLD IT TO CURACAO AND COLOMBIA.

67.We are trying new less expensive venues for a portion of our program. We are not sure how this will affect audience attendance. We are also charging for performances that in the past were free for our small ensemble in hopes to make up for the downturn in funding.

68.In order to reduce expenses substantially we closed our satellite gallery. The museum has also substantial cut its printed costs i.e. quarterly printed newsletter, invitations and mailings, and print advertising. The City cut the budget for contracted security guard service, which has impacted the number of guards we are able to hire.

69.Our salaries have been dramatically reduced since the stock market crash affected our funding.

However, our admissions are up, and we have actually been given a wonderful opportunity because of the downturn, a move to a better location at an affordable price because the market prices went down. So we predict a MAJOR growth period very soon as a result of the downturn, an example of something good that happened. We anticipate our salaries to recover, thanks to them being held in position by volunteers while funding was slim.

70.our budget for 2008-09 was 75% of what it was in 2007-08.

71.We have a Community Arts Fund Grant Program and have decreased the amount of grant money significantly from 08-09 fiscal year to the current 09-10 fiscal year.

72.This was the first time in our 30-year history that we did not receive funding from the State of Florida. The panel's lack of expertise and small number of panelists (3) was distressing. To be funded \$25,000 or nothing was very short sighted on the part of the Division of Cultural Affairs. Some groups that usually received \$3,000 - \$4,000 maximum each year suddenly received \$25,000 and other organizations that usually score high received \$0.

73.We are looking at other ways to generate operating funds. We are implementing a membership program and activating an aggressive fundraising program.

74.Positions which became vacant due to staff members finding other opportunities are not being restaffed. Therefore, even if we didn't really lay off more staff, but they left voluntarily, the resulting stress on the remaining staff is still getting bigger as we head into the season.

75.Question cannot be answered at this time. Organization has eliminated its only full time position and reduced hours available to the public. All programs are now in limbo, pending a reevaluation of direction. We are "hibernating" to protect our most valuable assets. We will shortly announce our recovery plans. We will continue to serve the community, and eventually recover pre-recession momentum.

76.The arts in particular are seen as a "luxury" and many funding sources are restricting their giving to social service non-profits. This combined with a significant loss of tax-based support, has left the arts in a VERY unstable position.

There is also the danger of having the public feel that all arts organizations are going to close their doors, so donors are reluctant to give money.

77. We're outraged that not a single Central Florida arts entity received a single cent from either the state or federal 2009 economic stimulus packages.

78. The cut in county grants has impacted our educational outreach programming which was just beginning to take off. Our board decided to continue to fund the part-time Education Position from our reserve funds through June 31, 2010. After that it is not sure if it can continue without out some outside support.

79. Our attendance and student numbers are staying relatively level, however we have seen a tremendous increase in scholarship requests and free/reduced ticket requests. Many of those requests have no outside financial support, as we exceeded our annual budget for scholarships in the first two months of our fiscal year due to summer camp programs. It is our commitment that money never be the reason children do not participate, so we are covering the difference internally, which will have a significant impact on our year ahead.

80. Our budget has been cut drastically. The most drastic cut is in advertising, which of course, is the way that we keep visitors coming through the door. We are now planning to do a great deal of printing of flyers, brochures etc. in house, in hopes of cutting some of our printing costs.

We are looking to do a lot more partnering in special events with other 501 (c) (3) organizations in order to create more dollars with less expense. We have already started doing that with our 2009 Gala, October 24, 2009. We partnered with another organization and it was a successful partnership for both societies.

81. I have full time staff working alot of overtime because we don't want to cut services, but cannot hire additional help. have had to cut marketing/advertising budget, and fear the ultimate consequences to admission revenue. it was either cut that or people, and I chose that.

82. Despite the past year's dismal investment income returns, the market is picking up again and it provides a solid, steady stream of operating support on an annual basis. Encouraging the State to continue funding the Cultural Endowment Program would provide many organizations with a necessary and additional long-term funding base that will help pick up the slack from the ongoing decreases in so many other income areas. It would also assure donors that the State is keeping its word in dedicated a funding source that encourages new donors and major gifts.

83. We are currently struggling to keep our doors open. We have gone to the media for help with raising public awareness of our need.

84. We are scared - we have no recognition as an economic impact to our community or county - even though the numbers are there - first from the state of Florida and then from a neighboring county. What is going on ... ???

85. If we had not received a stimulus grant from the NEA, my assistant's position would probably have been cut.

We moved into much smaller offices and sharing space which is saving money.

Last February, we changed our health insurance program (our only benefit). Staff now pays higher copays and deductibles.

86. We lost our \$50,000 line item from the state of Florida that was a core funding medium for a very marginalized population- persons with mental health challenges, we continue to serve this population with no funding source.

87. Lost of Educational grants, loss of endowment income

88. We will probably need to move and consolidate space in the next 6 months.

89. Adjustment of time - spend more time looking for funds and less time delivering program. Cuts in granting funds, mean we have less to grant to our organizations and many have closed or will be closing this year or next unless there is a dramatic change at the local and state level!