



Arts & Culture Assessment For Summit County

supported by



Completed by The Osgood Group, LLC
Nancy Osgood, President
With consulting partners:
Pat Cirillo, Cypress Research
Amy Morgenstern, Main Stream Enterprises, Inc.

SUMMARY

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KEY

Sources have been provided wherever possible in the write up below

FS = financial scan

OS = organizational survey

CS = consumer survey

CRT = community round table

KSI = key stakeholder interviews

OMR = other models research

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1. **Mostly, Summit County residents are “satisfied” with their “Arts and Culture Life”**
 - a. Most people who participate get what they need from Summit County, Cuyahoga County (or elsewhere), and don’t mind traveling to satisfy their desires
 - b. But if one looks at Summit County specifically, only a minority feel that Summit County has the quality / “what I want” (CS)
 - c. No one, anywhere, jumped up and said: “Why would I ever need to leave the county?” (CS)
 - d. If other groups are somewhat apathetic about Summit County A&C, African Americans are notwould like more that is related to their experiences; young people as well (CRT)

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- 2. Does the sector need help? There's a disconnect between Arts and Culture sector perceptions of itself and the public's perception**
- a. 63% of A&C see the sector as somewhat strong and vital (OS) vs. key stakeholders who mostly see it as challenged from a funding standpoint (KSI)
 - b. 87% of the “suppliers” in the sector see offerings as deep and varied (OS), but the market doesn't necessarily agree
 - African Americans don't see what's there for them (CRT)
 - Many potential consumers don't participate, both high income “power types” (KSI), and the population at large (47%) (CS)
 - c. Outsiders to the sector see it as disorganized and not unified, that is, not a sector but rather distinct organizations (KSI)
 - d. Sector does not seem to have great awareness of its own ‘big picture’

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3. **As a sector, arts and culture organizations are not on strong financial ground and don't regularly analyze their business**
 - a. 22% decline in revenue with only .9% population decline (2007 vs. 2011) (FS)
 - b. 19/31 organizations had "negative growth" (FS)
 - c. Months of cash has declined from 3.7 to 3.1 . . . at the bottom of the nonprofit Finance Fund "safe zone" (FS)
 - d. Basic stats aren't tracked; virtually no participation in the CDP (Cultural Data Project) (FS); only 1/3 review customer data regularly (OS)

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4. **Fund development (at the highest level) is a significant opportunity for the sector**
 - a. The organizations see this as their weak area (and their weakest area in terms of organizational capacity) (OS)
 - b. This also plays out with key stakeholders and the business community who “report” this in a variety of ways:
 - Many key stakeholders don’t know leaders of the major arts institutions, with the exception of a few large heads (*not* a negative but an opportunity; there’s interest in knowing them)
 - Many key stakeholders report that A&C organizations only approach them when they need money; no relationship building happens; unsophisticated (KSI)
 - Very little A&C board participation from key stakeholders (HHS much stronger) (KSI)
 - Business community was extremely unresponsive to roundtable invitation (CRT)
 - c. Can be summarized as weak or nonexistent relationship between the business community and A&C (KSI)
 - d. Another challenge: only 47% of people stay inside the county for A&C *and* those with lower incomes and education levels are the most likely to stay
 - e. Typical “loyalty indicators” are weak (subscriptions and memberships)

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5. Communication with consumers is an opportunity

- a. Many consumer complaints: “I don’t know what’s going on”
- b. Highly fractured media habits (no “one source”) (CRT, CS)
- c. Awareness levels are low for the things they like to do (live music, Lock 3, etc.)
- d. Although those who participate are satisfied, there are relatively low levels (47%) of participation

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6. There is no real A&C “sector”

- a. This came through most clearly among key stakeholders: “there are only individual institutions; there’s no collaboration, coordination or leadership across institutions” (KSI)
- b. There are 604 A&C organizations or individual artists; at best, 80 are involved with AAAA
- c. There does not seem to be a collective voice no a platform for it (FS)

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7. Positive things to say (among “insiders”) about changes at AAAA

- a. However, that does *not* translate into support for AAAA taking on a leadership or infrastructure-building role for the sector
- b. AAAA currently not representative of the sector (80/604) (FS)
- c. Although not a focus of this study, AAAA does not really reflect the perception that its name implies

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8. Support for new funding initiatives could be cultivated, but will take leadership and time

- a. Public priorities put A&C low on the list
 - Some, but not much, connection-of-the-dots: “vibrant A&C sector is necessary for high quality of life, which is necessary to attract/retain businesses, which supports health & human services needs”
- b. Current “funders of significance” could be supportive of a well-conceived plan to strengthen the sector; however, they are not willing to throw more money at individual institutions (KSI)
- c. United Arts Funds generally requires a strong corporate network – that has not yet been built here (OMR)
- d. There is reasonable personal support among key stakeholders for a tax/levy, but all agree it would be a long road to create and communicate the “case for support” (KSI)
- e. Support for a tax would be more likely come with something specific (e.g., a downtown cultural district) vs. general operating support (KSI, CRT)

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9. Leadership strength is lacking (but critical for change)

- a. Substantive change rarely happens from the bottom up – it takes a few strong leaders to push things forward (OMR)
- b. Summit County’s “powerful people” are not engaged in A&C (relative to other sectors) (KSI)
- c. A&C institutional leadership is perceived as lacking (KSI; OMR)
 - “Who are the leaders who can make change happen?”
 - A function of lack of connection?
- d. There is no organization in place right now that can assume leadership of any sector initiatives
- e. Related: Lack of any “collective voice of the sector” further supports this (FS)

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10. There is no perceived “problem” to be solved, therefore no urgency to change anything

- a) Most consumers of A&C are satisfied with the status quo in Summit County and are not concerned if some institutions go away (KSI, CRT)
- b) Most consumers are fine traveling to Cuyahoga County for what is not in Summit County. They embrace regionalism and are happy to have “one big market” from which to choose (KSI, CRT)
- c) Beyond a desire for more funding, A&C institutions themselves are satisfied with “what is” (OS); few supported ideas to establish a United Arts Fund or pass an A&C-dedicated levy (CRT)