



Orange County, FL Arts Ecology Study

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**EDYTH BUSH
CHARITABLE FOUNDATION**



Dick & Betsy
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**DEVOS INSTITUTE
OF ARTS MANAGEMENT**

AT THE UNIVERSITY OF MARYLAND

Arts Ecology of Orange County

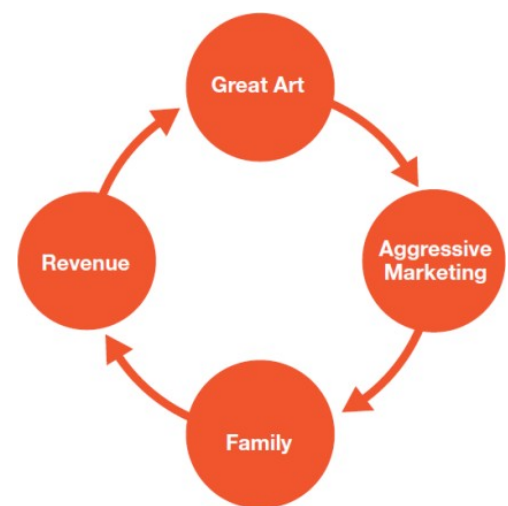
Orange County, FL is home to a rich and vibrant arts ecology. The Dr. Phillips Center is among the nation’s leading performing arts centers, and the addition of Steinmetz Hall has given the region a truly world-class concert hall. The major institutions in Orange County bring important guest artists to the region and support a growing community of professional working artists. But challenges remain. The landscape is dominated by one large organization, and the region’s arts organizations receive little national recognition. There are no large organizations of color, and many organizations must compete for limited resources. Arts managers and administrators in Orange County have few opportunities for management training and continued education—limiting opportunities for advancement. This plan evaluates the current arts ecology and suggests approaches for ensuring the arts sector grows sustainably as the region grows.

The DeVos Institute of Arts Management at the University of Maryland interviewed or surveyed 137 individuals from June through October 2022. Participants included board and staff leadership of 85 organizations, county and city government officials, individual artists, supporters of the arts, and philanthropists. Questions were both quantitative and qualitative regarding the status of individual organizations and broader observations on the arts ecology of Orange County. Interviewees and survey respondents were informed that only aggregate information would be brought forward for the study, with all identifiers removed.

The Cycle: A Model for Growth and Stability

The DeVos Institute at the University of Maryland’s teaching and research is informed by its proprietary model for building and sustaining healthy cultural organizations and ecosystems: *The Cycle*. This practical philosophy of organizational and sector-wide development and sustainability observes that thriving cultural ecologies hold several core characteristics in common:

- Their constituents’ programming is bold, mission-driven, and balanced.
- They are positioned to aggressively market their programming, as well as the institutions behind it.
- The resulting visibility produces a swell of interest and enthusiasm among a diverse “family” of ticket-buyers, community members, students, board members, donors, funders, and volunteers.
- They make it easy and enjoyable for that family to get more involved—to contribute money, time, or connections.
- They reinvest revenue produced by that family in necessary infrastructure, as well as ever-more dominant programming that, marketed well, entices a larger, more diverse, generous, and connected family.



When this cycle repeats year after year, all stakeholders—governments, workforce, volunteer trustees, community members, and other members of the ecosystem’s “family”—sense they are part of a strong, successful, progressive enterprise. For those with means, this momentum encourages increased generosity and ambassadorship; for those with skill and time, a swell of pride and focus drives increased engagement and productivity. These organizations and ecosystems grow steadily – donor by donor, patron by patron, ally by ally – to build and sustain superior artistic programs, community relevance, and financial health.

External Analysis

A comprehensive environmental analysis was conducted to better understand the environment in which Orange County’s arts organizations must operate.

All arts organizations in the United States are challenged by several trends:

- The Covid-19 pandemic temporarily reduced attendance for nearly all arts organizations, resulting in a loss of earned income.
- Reductions in arts and humanities education in the public schools has lowered demand for cultural experiences.
- The aging of the traditional arts donor base has placed pressure on cultural institutions to develop new sources of revenue.
- The rapid development of electronic forms of entertainment and education means that cultural institutions must become increasingly engaging.
- Workplaces are changing—many workers are seeking greater work-life balance and flexible work policies.
- As more arts programming is distributed electronically, it becomes more difficult to attract audience members and students to cultural institutions.
- Artist employment is recovering more slowly than other sectors of the nation’s economy.

The growing Orlando region is more diverse than the United States:

- While the state of Florida’s population grew 14.6% from 2010 to 2020, Orange County grew 24.8%
- The share of Orange County residents holding Bachelor’s and graduate degrees has grown by nearly 5 percentage points between 2010 and 2020.
- Orange County has also gotten older and more diverse, with age groups 55 years and older gaining over 4 percentage points in total.
- The county’s Hispanic population grew by over 6 percentage points in the same period.
- By 2030, the region is expected to reach a population of 5.2 million people, and expected to lead the nation in racial and ethnic diversity.

Eight comparator metropolitan statistical areas (MSA's) were chosen in collaboration with United Arts of Central Florida based on total population, median age, household income, and median home value.

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

The study found that Greater Orlando's top 10 arts organizations are smaller and younger than in the comparator set.

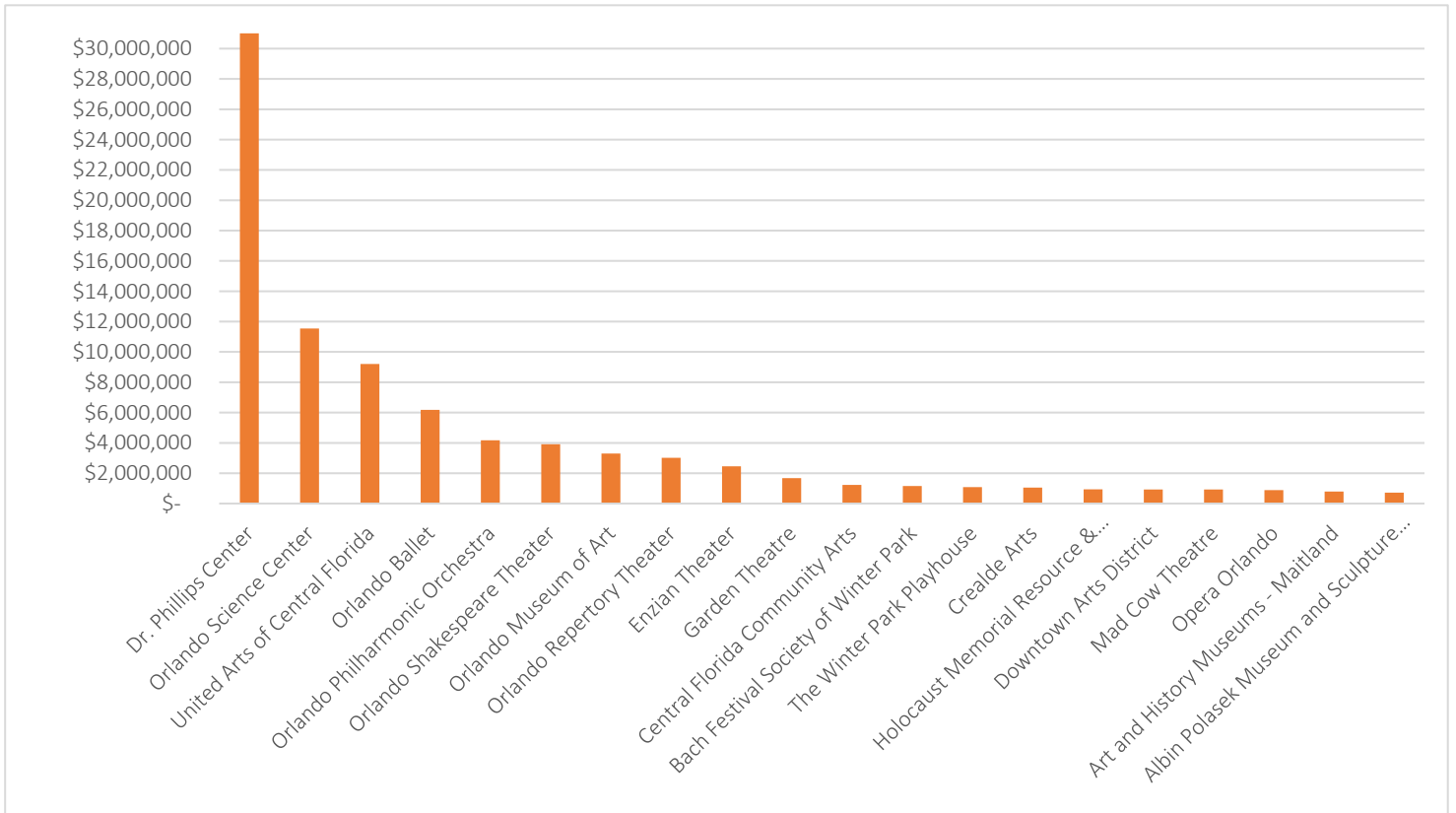
MSA	Population	Low End	High End	Average	Average Age
Seattle-Tacoma-Bellevue, WA	3,928,498	\$10,595,442	\$37,276,366	\$23,037,150	63
Pittsburgh, PA	2,324,447	\$6,418,496	\$56,852,629	\$16,377,582	67
Kansas City, MO-KS	2,144,129	\$4,936,911	\$46,614,611	\$14,112,522	57
Cincinnati, OH-KY-IN	2,214,265	\$3,636,544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

The study further examined the budget size of the largest arts organizations in each comparator MSA by artistic discipline.

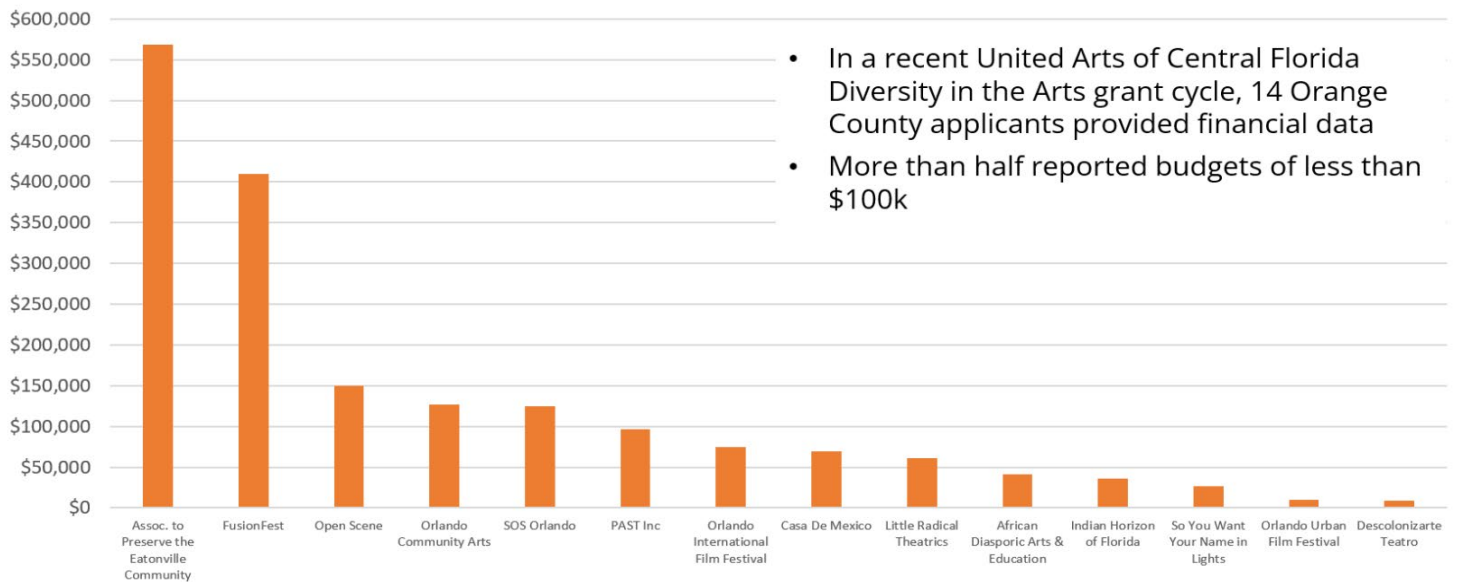
MSA	Symphony	Opera	Ballet	Theatre	Museum
Seattle-Tacoma-Bellevue, WA	\$28,858,298	\$21,947,605	\$25,196,894	\$24,040,858	\$37,276,366
Pittsburgh, PA	\$33,265,787	\$6,418,496	\$9,119,675	\$13,730,149	\$56,852,629
Kansas City, MO-KS	\$17,704,002	\$2,443,870	\$8,470,656	\$4,936,911	\$46,614,611
Cincinnati,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

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

The Dr. Phillips Center is the largest cultural organization in Orange County by far:



Orange County has very few organizations that primarily serve BIPOC communities, and they are smaller than their peers in the region.



- In a recent United Arts of Central Florida Diversity in the Arts grant cycle, 14 Orange County applicants provided financial data
- More than half reported budgets of less than \$100k

The Arts Ecology of Orange County

Topline Questions

- When asked about support and engagement of the arts in Orange County in recent years:
 - 66% said it had increased.
 - 15% said it had decreased.
 - 19% said it had stayed the same.
 - Arts Executives tended to offer a more optimistic perspective on this question than individual artists and those representing small community-based organizations.
- Only 60% of survey respondents said that citizens of Orange County have fair access to the arts.
- Collaborations are common, and many described a collegial culture of mutual respect amongst arts organizations in the region.
- Orange County has yet to cultivate the generational philanthropy that supports many American cultural communities, but the population is growing and there is great opportunity.

Artistic Planning

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

Partnerships are Common in Orange County

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

Arts Education

- 61% of those surveyed believe that students in Orange County are receiving a strong arts education.
- “All schools in Orange County have arts education in the classroom and United Arts coordinates supplemental programs for all schools.”
- Interviewees praised the support for arts education at the district level.

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

Marketing

Topline Observations

- Organizations in Orange County must compete with theme parks, sports events, and other for-profit tourist attractions for audience attention.
- A 2017 Ipsos Public Affairs poll found that 73% of Floridians visited an arts or cultural entity, on par with the national average—this translates to 1.87 million potential attendees in the Orlando-Kissimmee-Sanford MSA, excluding tourists.
- "We operate in a very competitive environment where there are lots of options for things to see and do. We are competing not only with other cultural venues, but also theme parks and attractions. Top of mind awareness can be difficult in such a crowded marketplace. In addition, there are barriers to entry for some audiences due to cost or lack of transportation, which we are helping to address through our accessibility programs."
- Orange County's diversity and expansive geography also present challenges – organizations must continue to experiment and segment their efforts wisely.
- Admissions prices are generally low:
 - 30% of respondents do not charge for programming, and an additional 18% offer at least some free admission.
 - Only 18% of respondents sell tickets above \$100, and all offer tickets for as low as \$29.
- On average, organizations devoted 46% of their marketing budget to digital media, 23% to print, 11% to radio & television, and 20% to other sources.
- Many smaller organizations expressed that they are struggling to adapt to a marketing environment dominated by digital advertising and acknowledged insufficient funding for marketing efforts.

Audience Profile and Preferences

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

Institutional Marketing

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

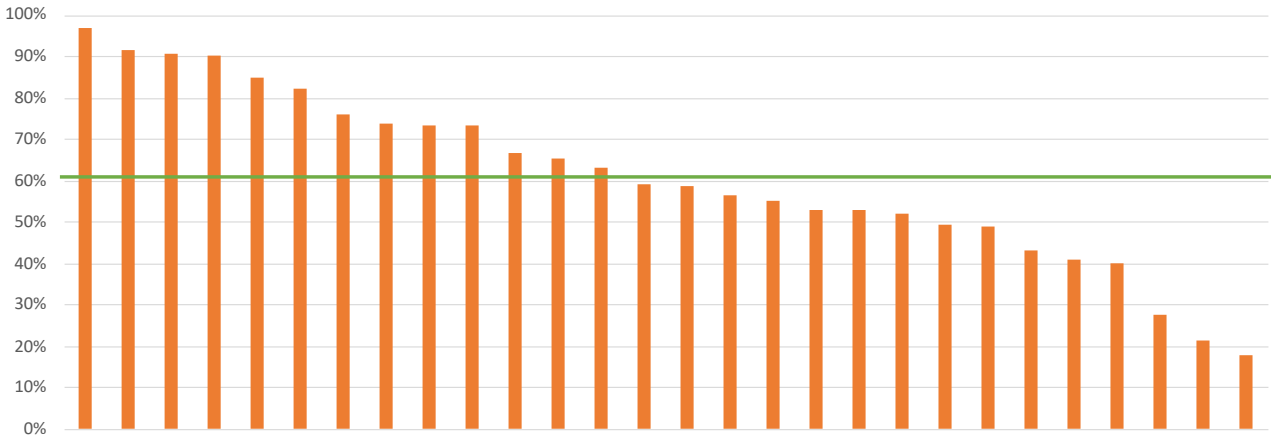
Fundraising

Topline Observations

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

Organizations Surveyed Were Largely Reliant on Contributed Revenue

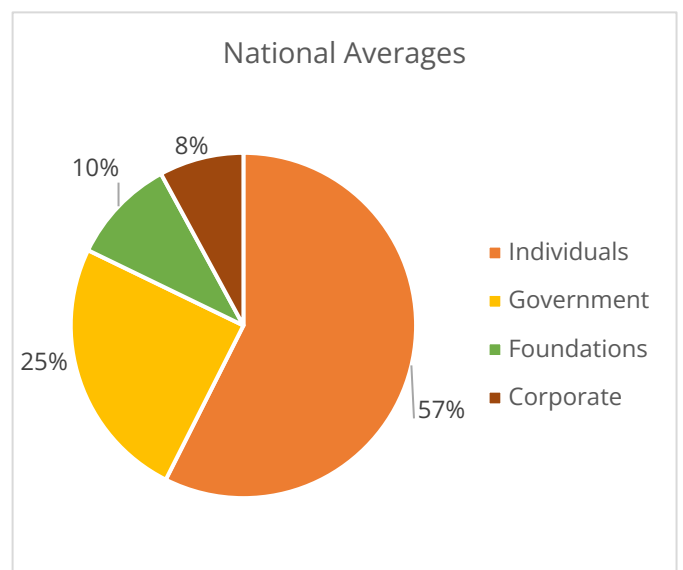
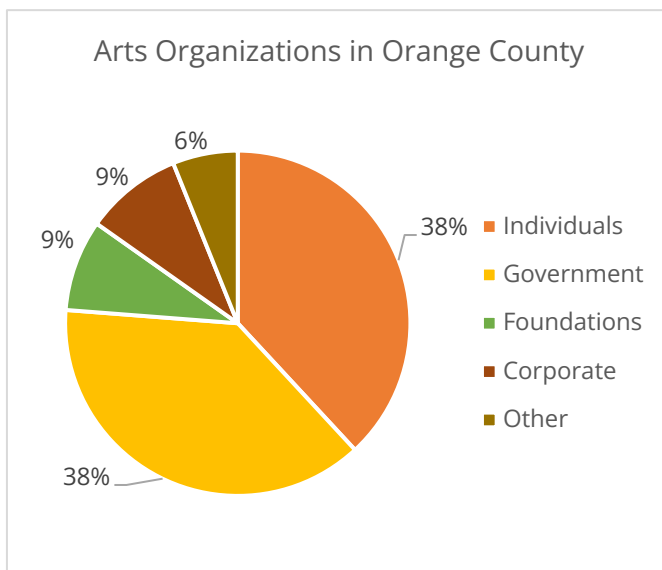
- 36% of organizations rely on over 70% contributed revenue.
- 11% of organizations receive less than 30% contributed revenue.
- While there is no ideal mix for all, organizations that lean heavily on either type face greater exposure.



- The study also found that participants were heavily reliant on their five largest funders, with 61% relying on their five largest funders for more than 50% of their contributed revenue.

Sources of Contributed Revenue

- Participating organizations received significantly fewer individual contributions than those in similar sized markets across the country—38% in Orange County vs 62% in large markets and 48% in medium markets.
- Governmental sources tied with individuals for the largest percentage of contributed funds raised in the last FY, likely owing to extraordinary efforts in response to the pandemic (SVOG, PPP, etc). But several mentioned Orange County's generous public support.
- United Arts of Central Florida's unique approach to its *Collaborative Campaign for the Arts* allows several organizations to increase their contributed revenue through additional matching funds.



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

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

Orange County Provides Significant Funding to Arts & Cultural Organizations

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

Boards

Topline Observations

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

Arts Workers in Orange County

Arts Organization Staffing

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

Survey Responses from Gig Workers and Working Artists

- “Overall, I am impressed by the number of arts organizations here in Orange County. Our robust arts scene, however, is generally powered by people who have day jobs to support their artistic habit.”
- “We’re still not taken seriously in this area. There are a few arts organizations that soak up all the money but very little money or support for individual artists.”
- “Most education for artists focuses on technique and theory, they don’t treat them like businesses. As a result, most artists have zero business acumen when they enter the field.”
- “This city thrives on an artist-driven economy, yet the housing market prices out artists.”
- “Too many local community theatres hire professional actors at wages that are well below living wages. These organizations then claim to be ‘professional.’ This is made possible by performers who earn living wages in theme parks.”
- “Artists are underpaid when it comes to government work. There are not many opportunities. If you do apply for a project, it seems you must have experience creating public art, which is tough when you’re trying to break into the public art scene.”
- “There are a lot of seasoned, successful, professional artists in central Florida. And most of us don’t show our work here.”

Financial Health of Arts Organizations

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

Space for Arts in Orange County

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

Conclusions

Orange County is home to a rich arts ecology and diverse potential audience base, but cultural organizations in the region are small (and young) given the size and growth of the metro area. The community is dominated by one large presenter, while organizations that produce are under-funded and under-resourced by comparison. Arts organizations of color receive even fewer resources. Local and county governments provide a great deal of funding, while contributions from individuals are far lower than the national average. A modest level of national arts news generated from the region makes it difficult to build an individual donor base and to attract funds from outside of the region. Very few organizations engage in the advanced planning that would assist in greater resource generation.

Orange County needs a culture of philanthropy commensurate with the aspirations and ambitions of its arts sector. Select larger scale projects and more robust institutional marketing efforts will build the profile of individual organizations and Orange County as a cultural destination. The region also requires a comprehensive approach to arts management training to create the infrastructure needed to manage and govern a set of large, vibrant arts organizations.

Recommendations

Flagship Institutions

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

Capacity Building and Mentoring

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

Orange County as an Arts Incubator

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

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

Arts Incubator for BIPOC Organizations

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

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

Fund for Major Initiatives

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

Arts Education

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

Attracting Larger, Younger, More Diverse Audiences

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

Encouragement of Marketing Efforts

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

Building National Awareness for the Arts in Orange County

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

Building A Culture of Philanthropy: Individuals

- Fund capacity-building efforts for organizations committed to establishing healthy individual giving programs.
- Offer restricted funding for organizations to add/improve CRM's, including staff training.
- Encourage foundations to offer match programs that incentivize new donor acquisition.

- Create a Young Professionals Council for the Arts to capture the attention of Orange County's emerging professionals and prepare them for board service.
- Increase investment in United Arts *Collaborative Campaign for the Arts* to encourage greater participation by individuals.

Building A Culture of Philanthropy: Corporate

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

Space for Arts in Orange County

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

About the DeVos Institute of Arts Management

The DeVos Institute provides training, consultation, and implementation support for arts managers and their boards. It operates on the premise that while much is spent to train artists, too little is spent to support the managers and boards who keep those artists at work.

At the same time, rapid changes in technology, demographics, government policy, and the economy have complicated the job of the manager and volunteer trustees. These challenges continue to accelerate.

Organizations that have mastered these trends are flourishing—even leveraging them to their advantage. For those which have not, however, the sense that “something’s not quite right” can seem unshakable. For too many, these changes have led to less art, decreased visibility, diminished relevance—even financial collapse.

These challenges inform the Institute’s approach. Never has the need to balance best practices and new approaches been so urgent.

Institute leadership and consultants—all arts managers themselves—understand that, in today’s environment, there is no time or resource to waste. Therefore, Institute services are lean, direct, and practical.

Since its founding in 2001, the Institute has served over 1,000 institutions from over 80 countries. While environments, objectives, and disciplines vary, each of these clients share the desire to create, market, and sustain exemplary cultural programs.

As such, the Institute has designed its services to assist a wide range of institutions, from traditional performing and presenting organizations, museums and galleries, arts schools, and libraries, to botanical gardens, glass-making studios, public art trusts, and non-profit cinemas, to name a few.

It offers support to individuals, organizations, and—in collaboration with foundations and governments—to communities of organizations throughout the world.

The DeVos Institute transferred its activities and offices from the John F. Kennedy Center for the Performing Arts to the University of Maryland in September 2014. The move enables the Institute to expand its global training and consulting programs, enhance its fellowships for North American and international arts managers within the context of a major educational institution, and create a Master’s program that leverages both University and Institute resources.

About the Project Team

Michael M. Kaiser

Chairman, DeVos Institute of Arts Management

President Emeritus, John F. Kennedy Center for the Performing Arts

Michael M. Kaiser founded the DeVos Institute in 2001.

From 2001–14, Kaiser served as President of the Kennedy Center, the nation's center for the performing arts, where he expanded the education and artistic programming, oversaw a major renovation effort of most of the center's theaters and led the country in arts management training.

Signature artistic programs during his tenure included an unprecedented celebration of the works of Stephen Sondheim; major festivals of the arts of China, Japan, India and the 22 countries in the Arab World; long-term relationships with the Bolshoi Ballet, the Mariinsky Ballet and Opera, New York City Ballet and Alvin Ailey American Dance Theater; festivals of gospel, country, a cappella music and street arts; a celebration of August Wilson's ten plays presented in sequential order; as well as a major revival productions of *Ragtime* and *Follies* both of which transferred to Broadway. Mr. Kaiser also worked closely with the National Symphony Orchestra and its Board of Directors on the Orchestra's performances and outreach programs as well as with the Washington National Opera's leadership on the Opera's performance and educational programs.

In 2001, Mr. Kaiser created the Kennedy Center Arts Management Institute, renamed the DeVos Institute of Arts Management in May 2010 to provide advanced training for arts administrators and to provide consulting support. Since its inception, the DeVos Institute has advised thousands of individuals, organizations, governments, and foundations throughout the United States and in more than 80 countries on six continents. The Institute's programs include capacity building programs which have served more than 800 organizations in cities across the United States, regional and national initiatives which focus on board development, nine-month and summer fellowships for both American and foreign arts leaders as well as internships and other personalized training tailored to a variety of arts organizations around the world. The Institute moved to the University of Maryland in 2014.

In February 2009, Mr. Kaiser created *Arts in Crisis: A Kennedy Center Initiative*, a program which provided free arts management consulting to non-profit performing arts organizations around the United States. Mr. Kaiser embarked on a national tour for the Arts in Crisis initiative, leading arts management symposia in all 50 states, Puerto Rico, and the District of Columbia through July 2010.

In October 2009, Mr. Kaiser launched *Any Given Child*, an initiative that works with school systems, local governments, and arts organizations to create localized, long-range arts education plans for students grades K-8 with the goal of ensuring that all young people in the community have access to a complete, affordable arts education. There are now over one million school children in the United States who participate in this program.

Mr. Kaiser previously served as the Executive Director of the Royal Opera House (Royal Opera and Royal Ballet), the largest performing arts organization in the United Kingdom. During his tenure with the Royal Opera House, that organization erased its historic accumulated deficit, completed a £214 million redevelopment of the facility, created an endowment fund, and greatly increased its level of support from the private and public sectors.

Prior to joining the Royal Opera House, Mr. Kaiser was Executive Director of American Ballet Theatre. During his three-year tenure at ABT, Mr. Kaiser erased the entire historic accumulated deficit, created a second company, greatly expanded national and international touring activity, substantially increased both contributed and earned income, and built an acclaimed series of education programs.

Mr. Kaiser has also served as Executive Director of the Alvin Ailey American Dance Theater Foundation, the world's largest modern dance organization. During his tenure, the Ailey Company erased its accumulated deficit, expanded its school, and increased all forms of revenue. He has also served as General Manager of the Kansas City Ballet, where he also erased the company's deficit.

As an arts management consultant, Mr. Kaiser has advised such institutions as Yale University, Oxford University, Leshner Center for the Arts, Baltimore Symphony Orchestra, Philharmonia Baroque Orchestra and Chorus, Philadelphia Orchestra, True Colors Theatre Company, Theatre for a New Audience, Canadian Stage, The St. Louis Muny, Woolly Mammoth Theatre, Dayton Contemporary Dance Company, Debbie Allen Dance Academy, Step Afrika!, National September 11 Memorial & Museum, Public Art Fund, the Wallis Annenberg Center for the Arts, Paul Taylor Dance Company, Pregones Theater, Martha Graham Dance Company, San Antonio Symphony, the Market Theatre (Johannesburg), Penumbra Theater, San Francisco Gay Men's Chorus, Memphis Brooks Museum of Art and many others. He has also represented the United States on a commission that established the Arts Council of the Republic of South Africa.

Before entering the arts management field, Mr. Kaiser was a management consultant in the corporate sector. In 1985, he sold the consulting firm he founded, Kaiser Associates, which specializes in helping large corporations formulate strategic plans. Among his clients were General Motors, IBM, Corning Glass Works and 50 other major corporations. Kaiser Associates remains a major participant in the strategy consulting field.

Mr. Kaiser has served as a research economist for Nobel Prize-winning economist, Wassily Leontief, and is the author of eight books: *Curtains?: The Future of the Arts in America* (2015), *The Cycle* (2013), *Conversation Starters: Arts Management Topics for Today* (2011); *Leading Roles: 50 Questions Every Arts Board Should Ask* (2010); *The Art of the Turnaround* (2008); *Strategic Planning in the Arts: A Practical Guide* (1995); *Developing Industry Strategies: A Practical Guide of Industry Analysis* (1983); and *Understanding the Competition: A Practical Guide of Competitive Analysis* (1981). A revised edition of *Strategic Planning in the Arts* was published in 2018.

Mr. Kaiser received his Master's degree in management from M.I.T.'s Sloan School of Management and his Bachelor's degree in economics *magna cum laude*, from Brandeis University. He has been an

Adjunct Professor of Arts Administration at New York University, and a Lecturer at the University of the Witwatersrand in Johannesburg. He is currently a Professor of the Practice at the University of Maryland.

He received the *Dance Magazine* Award in 2001, Capezio Award in 2002, Helen Hayes Washington Post Award for Innovative Leadership in the Theater Community in 2003, the St. Petersburg 300 Medal in 2004, Washingtonian of the Year in 2004, a U.S. Department of State Citation in 2005, the Blacks in Dance Award in 2005, and was the first American to receive China's "Award for Cultural Exchange" in 2005. He was awarded The Order of the Mexican Eagle in 2006 and was named Impresario of the Year in 2006 by Musical America. In 2009, Mr. Kaiser received the George Peabody Medal for Outstanding Contributions to Music in America and the Kahlil Gibran "Spirit of Humanity" Award from the Arab American Institute Foundation. In March 2011, Georgetown University conferred on him the degree of Doctor of Humane Letters, *honoris causa*. In 2015, the University of Missouri-Kansas City conferred on him the degree of Doctor of Music, *honoris causa*.

Matthew Kacergis

Associate Consultant, DeVos Institute of Arts Management

Matthew came to the DeVos Institute in 2018 and has since worked on a wide variety of project teams across the organization's portfolio of services. He specializes in the curation and delivery of performing arts programming and supports strategy development for the Institute's strategic planning practice. Matthew currently serves on the executive leadership team of the Great Lakes Center for the Arts, overseeing a budget of \$4 million and a year-round season of artistic programming in collaboration with Artistic Director Michael Kaiser.

Before becoming an arts administrator, he spent more than a decade as a professional actor, appearing on television, at regional theatres, and on the National Tour of *Disney's The Little Mermaid*. A member of SAG-AFTRA and Actors' Equity Association, he served on several national and regional committees, including contract negotiating teams. His arts advocacy work has led him to serve in a variety of capacities with the National YoungArts Foundation, of which he is an alumnus and a member of its Alumni Advisory Council.

Matthew has studied Musical Theatre at The Boston Conservatory and received a Bachelor of Arts University of Massachusetts Amherst with a Core Certificate in Arts Management. He is an Executive Master of Nonprofit Administration candidate at the University of Notre Dame's Mendoza College of Business. He lives in Seattle with his wife Katy Tabb, a professional choreographer and dance educator.

Dmitry Samogray

Research Associate, DeVos Institute of Arts Management

Dmitry Samogray is a Research Associate with the DeVos Institute of Arts Management, providing research support for the Institute's consulting practice. With a concentration on fundraising, his

work encompasses capital campaigns, feasibility studies, donor research, organizational audits, environmental research, and long-range planning, amongst other areas.

Prior to arriving at the Institute, Samogray has occupied roles in music administration, education, and performance. As a classical concert pianist with a passion for arts management, he co-founded the Audeamus Music Festival, a chamber music festival in Zagreb, Croatia. At the keyboard, he is closely associated with the music of the Pulitzer-nominated American composer, Robert Muczynski. Samogray has concertized across Europe and the Western Hemisphere, with highlights including a South American tour of Peru, Chile, and Argentina. His debut album was released by Brilliant Classics in 2017.

Samogray earned a Bachelor of Music degree from the Peabody Institute of The Johns Hopkins University along with a Master of Music and Doctor of Musical Arts degrees from the University of Maryland, College Park. For his dissertation, Samogray produced and recorded the first complete survey of Robert Muczynski's solo piano music.