

UNITED ARTS Response to DeVos institute of Arts Management's Orange County Arts Ecology Study

March 23, 2023

July-November 2022 our community embarked on an audit of the health of the arts ecology of Orange County by the DeVos Institute of Arts Management of University of Maryland. By evaluating management, finances, governance, participation, marketing, and arts education within our existing cultural framework we hope to understand the current state of our arts and cultural ecosystem.

United Arts partnered with Orange County Arts and Cultural Affairs, Edyth Bush Charitable Foundation and Dick and Betsy DeVos Family Foundation to take this deep dive. The timing of the study was very important for three reasons.

- We are emerging out of the pandemic and seeking to understand the total impact on our sector as well as seize opportunities for strategic growth and advancement.
- At the same time, we have celebrated the much-anticipated completion of Steinmetz Hall built for the benefit of our local performing arts groups and now one year open, we understand the impact of this awesome addition to the cultural landscape.
- Orange County and City of Orlando are preparing for a county-wide cultural planning process to begin in 2023 that will survey the public will for the arts.

The study is complete, and the results point to four major findings:

1. For a young region, we have established a rich and vibrant arts ecology that enjoys collaboration and partnerships across the sector. However, our local arts organizations are not able to keep up with the massive growth of our population and expectations to be competitive in a global tourism economy. We are the fastest growing region in Florida and our metro population growth rates will double from 2.5 million people to 5.2 million people the size of Atlanta in 7 years. At the same time, our arts organizations are smaller and younger than comparable cities with our current population size: Pittsburgh, Seattle, Cincinnati, Nashville, Charlotte, Kansas City, Tampa Bay Area, and Austin.

United Arts response: We will need a comprehensive capacity building program focused on growth and sustainability for organizations and artists that includes advance planning 2-5 years to secure resources and develop artistic excellence. Our sector must dream bigger together and plan further in advance for the opportunity to attract new audiences and new investment. Funds for general operations are critical to build and sustain arts organizations and to allow them to make long range plans.

2. Although we collectively raise approximately \$40 million annually for the arts from the private sector, contributions from individuals are low compared to other cities our size. Private philanthropy has been the bedrock of the arts in our nation for over 200 years, but not as strong in Central Florida. We are such a young community, and we do not have hundreds of multi-generational families that have made the local arts a priority in their major giving or in their estate planning. All of our comparable cities have well established endowments for the arts and annual funding from the private sector that exceeds public funding for the arts. Seattle and Pittsburgh have comparable public funding with 12-13% of operating budgets for the arts which is comparable to public grants in Orange County which provide support of 12% of budgets on

average. Arts budgets in these comparable cities for the top five comparable anchor organizations total \$199 million - \$37 million. Our five anchor/largest organizations operating budgets collectively total \$28 million. We must start investing today for the future so that we have the same success stories to share with the generations to come.

United Arts response: Across the cultural sector we will need to develop robust donor engagement strategies, stronger stewardship of our loyal donors and build the capacity of development and marketing staff to increase awareness and contributions from new donors. All of this requires unrestricted operating support and sustainable resources that allow the scaling of the arts at all levels to have greater impact. The next generation of philanthropists want the arts for more than entertainment, they are seeking social impact as well. This is our next generation of audiences and donors that are members of our community today.

3. Potential audiences for Orange County cultural organizations are growing younger, more diverse, and more educated. How are we going to cultivate our population of 55% Millennials and younger to engage, invest, and promote the arts as a critical part of their lives and the economic success of our community? Understanding our unique population is critical to strategies for programs, marketing, and increasing access to the arts. Orange County is more diverse than our entire nation with 63% representing BIPOC communities. Our median household income of \$64,833 is on par with national average and post-secondary attainment is 33% with national average of 27%. Average age is 35 and over 22% were born in another country. We have 12.8% of our neighbors living in poverty which is higher than all of comparable metro areas. Our anchor organizations strive to be accessible and culturally relevant with diverse leadership and programming to grow new audiences, however our diverse arts organizations are small and mostly led by volunteers.

United Arts response: 26 BIPOC lead organizations with missions to promote and advance diverse cultures applied in 2022 to United Arts' Diversity in the Arts grants program which provide 2-year capacity building grants of critical operating dollars. We could only fund 15 of the 26 applicants due to limited resources. Four did not meet the criteria due to lack of organizational governance and financial reporting. We must be intentional to support an increase in dedicated resources for BIPOC organizations and provide mentorships and ongoing technical support to help these organizations be sustainable and grow to scale.

4. Central Florida is known around the world as a top tourism and convention destination with over 70 million people traveling here annually. The cities in America that we compete with for global tourism NYC, Miami, and Chicago. These destinations annually invest over \$200 million public dollars in the operations and programs of their local arts organizations and set aside millions of dollars annually for capital improvements and investments in arts facilities. Loch Haven Cultural Park attracts over 1.5 million people annually. Loch Haven resident organizations collectively represent an \$89 million community asset. In 2021, the seven resident organizations, along with United Arts, Opera Orlando and Orlando Philharmonic collectively invested \$2.1 million in advertising and promoting the arts to build audiences and increase awareness. This is nothing in a saturated and competitive global market of theme parks, major professional and college sports and entertainment destinations.

United Arts Response: There is an ongoing demand for affordable and accessible cultural experiences and easy access to information to know about upcoming events and performances. It is time to make significant investments in creating world-class cultural institutions that align with our world-class theme parks, sports and entertainment venues. We must increase funding for cultural tourism marketing and leverage our strategic partnerships with Visit Orlando and Experience Kissimmee to reach the tourism audiences and raise national awareness of our cultural assets. We must partner with all of our stakeholders to develop our national marketing

messages to promote our vibrant, diverse cultural destination with daily offerings celebrating what makes us unique and welcoming to all people.

CONCLUSION:

If we are going to take the arts seriously, we must invest seriously in the arts.

We must increase investments in stabilizing, strengthening, and advancing the core operations, facilities, technology, artistic product, planning, management and capacity of our organizations and individual artists to scale up the amazing work we are doing on stages, galleries, in neighborhoods, on murals, and in schools.

We want to meet the needs of our cultural organizations, artists, residents, and visitors. We share the aspirations of this global destination for innovation, high-tech, defense technology, aerospace, entertainment, hospitality, creativity, wellness, biomedical research, and competitive higher education.

Recommendations in the works already

Cultural Tourism partnerships with Visit Orlando and developing cultural tourism product.
Culturally Diverse teaching artist in our schools and outreach

Opportunities and steps needed to ensure art sector grows on same scale as our population and tourists.

CAPACITY BUILDING AND STRENGTHENING

- Encourage Long-range 2-5 years strategic and artistic planning to secure greater resources
- Build culture of philanthropy that aligns with aspirations of our creative arts sector
- Professional Development for major individual giving programs.
- Boards - 33% rated their Board strong - Board governance training is need across the sector to improve fiscal accountability, inclusion, strategy, and engagement
- Diversity and Inclusion training for all arts Boards and staff ongoing
- Paid internships.
- Space - Identify public and commercial space that is vacant and can be used for arts experiences, studios, performances and exhibits. Work closer with parks and recreations City and Orange County to utilize local arts programs for their audiences.

PROGRAMS TO STRENGTHEN THE SECTOR

- Advance Planning beyond 12 months to encourage cross sector partnerships and collaboration.
- 2-5 year planning for artistic, marketing and development needs
- Arts Incubator for BIPOC organizations with capacity building and business training
- Affordable Artist Studios with exhibition and performance space (possible live work)
- Artist Co-ops, shops and permanent artist markets - Community Development areas
- Increase access to arts in poor areas - Outside of urban areas very little outreach in all of Orange County
- Arts Education in Orange County is at a national high standard but needs to make sure all schools have access and that culturally diverse teaching artists are in the mix. Opportunities to engage middle school students who have a real passion for the arts and want to develop skills.

MARKETING AND AWARENESS

- Develop marketing that is culturally sensitive and culturally specific to attract larger, younger and diverse audiences

- Build national awareness with institutional marketing beyond Orlando at Play and Orlando Arts Magazine to build profile of organizations and destination as a whole
- Dream Big and Continue signature festivals - Immerse and FusionFest
- Support touring of Orange County exhibits, and productions to other major metro areas
- Invest in Collaborative Campaign marketing and incentives to increase greater participation by individuals
- Dream together and plan together to Invest in Big Ideas 2-5 years