Small and Mighty
A Study of Small and Midsized Presenting Organizations in the United States
September 2020

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Preface and Acknowledgements

In the current landscape of 2020, the release of *Small and Mighty: A Study of Small and Midsized Presenting Organizations in the United States,* and its accompanying COVID-19 Supplement, represents a timely and seminal resource for the presenting, touring and booking field and the national, regional and local funders who support it. When the Association of Performing Arts Professionals (APAP) undertook this important study in the fall of 2019 in partnership with Callahan Consulting for the Arts, it marked the first national study of small and midsized organizations (SAMPS) in the U.S. None of us could have imagined how 2020 would impact the performing arts field and the focus of this study, or how COVID-19 would devastate our field. SAMPS are especially hard hit and this study includes a special supplement that provides deep insight into the professional and personal challenges they face as a result of the pandemic.

As we work collectively to restructure and re-imagine the performing arts industry from the devastating effects of COVID-19, APAP is committed to helping SAMPs navigate through the current challenges and hurdles that existed before the onset of the pandemic while highlighting the critical role they play in our communities. At APAP, we create programs and resources that equip members with the information, knowledge, skills, networks, and capacity they need in a rapidly evolving performing arts presenting, booking, and touring industry. And we realized that "small and mid-sized presenters, particularly in rural America, change lives in ways that are valuable and irreplaceable."

We are grateful to the Wallace Foundation, for supporting this study by providing funding and for their interest in this topic and the results. With their support we are better able to understand the impact and investments these organizations have on their community and insights into their work in audience development. This study is a continuation of our preliminary research, *Small and Midsized Presenters in the United States: Stories and Perspectives,* also funded by Wallace. We appreciate their partnership and assistance in increasing the visibility of this vital constituency, especially as they pivot and adapt post COVID-19.

Our deep thanks go to the nine study partners, without whom this study would not have been possible. They advised on design of the survey and overall study, provided contact information to thousands of constituents, and helped to promote and support the recruitment of respondents. They include leaders from five of the regional arts organizations: Adam Perry, Arts Midwest; Christine Bial, Mid-America Arts Alliance; Theresa Colvin, Mid Atlantic Arts Foundation; Mollie Quinlan-Hayes, South Arts; and Chrissy Deal, Western States Arts Federation. They also include staff from three presenter networks: Shannon Mayers, Arts Presenters of Northern New England; Hanna Oravec and Lori Jones, New England Presenters; and Susan Heiserman, North Carolina Presenters Consortium. Tim Wilson of the Western Arts Alliance played a similar role and we appreciate, in particular, his feedback on the survey design. Arts Midwest and Western Arts Alliance also provided free conference registrations to serve as incentives.

We also thank the three leaders who tested the survey: Gwethalyn Bronner, Executive Director at James Lumber Center, College of Lake County, Grayslake, IL; Joe Clifford, Executive Director.

Lebanon Opera House, Lebanon, NH; and Lynn Creamer, Artistic Director. Carnegie Hall, Lewisburg, WV.

Finally, thanks go to the many SAMPS, for taking the time to respond and share their stories. We are inspired by your dedication to your organizations, this essential work, and your ever-present exemplification of "small and mighty".

Krista Rimple Bradley

Director of Programs and Resources, Association of Performing Arts Professionals

Executive Summary

The Association of Performing Arts Professionals (APAP) presents new national research intending to benefit a segment of the field that has, at the national level, been largely overlooked: small and midsized presenters or, as they have become known over the past year, SAMPs. Questions to be addressed were their general distribution, working structures, contexts in which they are working, changes in their broader communities or organizations, any needs of these organizations that APAP or the Regional Arts Organizations (RAO) might be able to address. The study was open to nonprofit presenting organizations with budgets from $50,000 - $2 million, and that pay at least $25,000 per year in artist fees. Of the 1,988 that were sampled, a total of 606 or 30% participated in the survey and 410 (21%) qualified on all criteria. The survey was conducted before the COVID-19 pandemic; some follow-up data was later gathered and is presented in a supplement.

A. The SAMP Landscape: Respondents' Organization Types, Sizes, Ages, and Locations.
More than half of respondents are independent 501(c)3 organizations. More than one-third are affiliated with colleges, either as programs or with (c)3 status; units of government comprise a smaller group. Respondents' organizations were founded over 172 years, between 1847 to 2019. By far the largest percentage of organizations—45%—were founded between 1976 and 2000, following the creation of the National Endowment for the Arts in 1968. Three quarters have budgets of less than $1 million and half have budgets of less than $500,000. Close to half—43%—have annual artist fee budgets of less than $100,000. Well over half (57%) typically pay artists less than $10,000. All but two states (Alabama and North Dakota) are represented.

B. A Closer Look at Community: Types and Changes. The study investigated the type of communities where SAMPs reside to create a picture of their locations, environments and context in which they work. Respondents were roughly split into thirds: 1) rural, 2) urban and 3) both suburban and other types combined. The largest portion—38%—are in rural locations.

Respondents were asked to choose if, and how much, five aspects of their community had changed in the past three years. One-quarter to one-third experienced some degree of change in one or more aspects. The most frequently mentioned area of change was gentrification. Respondents' comments about gentrification reflected deep concerns about how increased housing costs affect the makeup of neighborhoods, and the resulting displacement of longtime locals, including artists, people of color and those with low incomes. These concerns were consistent across communities and organization types. For presenters in large urban areas, housing prices continue to soar, escalating the crisis. Rural presenters may feel the effects differently; for a handful, their communities become second homes or destinations for wealthier people or provide larger homes for local residents. Presenters in communities that attract tourism—from North Carolina to California—recognized the double-edged sword of having a flourishing tourism industry, and the resulting displacement of wage workers who serve vacationers but can no longer afford to live in the communities where they work.

Other themes included politics and immigration. Some SAMPS, particularly those in rural areas, commented on the trickle-down effects of the national election on community interactions and even audience behavior. General comments were made about the shifting of local and state governments from red to blue, or vice versa. Positive comments about politics were rare, and typically expressed pride in the presenters' liberal positions in contrast with their more conservative surroundings, as well as their

responses to political tensions brought about by the national election. Across nearly all comments on immigration, one theme was rampant: presenters' concern over immigrants' fears for their own safety. Presenters feel tension and concern, prompted by changes in national politics and immigration policies, which leave immigrants feeling unsafe.

Comments on demographics of audiences were simpler and predictable. Respondents stated that their audiences had become more "diverse," and defined or implied that diversity meant either by ethnicity or age. For most respondents who referenced younger audiences, comments were also brief and nonspecific, but they seem to be moving from audiences over age sixty to those of parenting age.

C. Structure: Staffing and Budgets. SAMPs offered their opinions and stories about how they carry out their jobs, revealing some of their biggest challenges. The majority—90%—have some full-time salaried staff but exactly half have no more than three of them. The vast majority of respondents—84%—work in programming. More than half of them work in fundraising and education, and nearly half work in marketing and finance. They are most likely to have other paid staff in venue operations, front and back of house, and marketing. Two-thirds of respondents (272) have their own board of directors; more than half of these boards provide governance only, and another one-third are working boards and governance.

Clearly the SAMP respondents wear many hats within their organizations. *Exactly half, or 50% of respondents, play four or more roles within their organizations.* All 268 (71%) who felt that the wearing of hats was more extreme for them than other organizations explained why in comments that were longer and more emotional than any other part of the survey. About one-quarter seemed to carry the weight of the world on their shoulders from fulfilling so many roles within their organizations. They provided lists—or for some litanies—of all the job titles that they maintain, or tasks that they complete. An independent presenter in a Maryland suburb exclaimed, "I don't wear many hats—I wear ALL the hats. There is no aspect of the operation that I can delegate completely." This job overload can play out differently for institutions, where respondents described their relationships to—and sometimes tensions with—the larger entity. They described the dual roles they play to both present and realize a mission that is unrelated to their presenting work. A college presenter in rural Texas wrote: "I am a full professor [and teach] 5-6 courses a semester, program and negotiate contracts, supervise the box office and the facilities, and [serve as] technical director for the building and all events that take place in it." About 25 explained, in a more granular way, the patchwork of roles and dual functions that they, and others affiliated with their organization, play, including single-person departments, managing the organization on a volunteer basis, dividing responsibilities with volunteer members, or overlapping responsibilities of venues that serve multiple uses. For some, the unstaffed yet constant need to fundraise looms over all positions.

D. Programs, Events, and Venues. Respondents reported on the capacities for a total of 583 venues. The smallest venue accommodates 25 people, reported by two respondents, and the largest venue has a capacity of more than 20,000, also reported by two respondents, both for outdoor festivals. The median venue size is 420 seats. Of the 265 who responded, three-quarters have venues with more than 400 seats and nearly half (121 or 46%) have venues with 800 or more seats. Half program from fall to spring, with an additional 39% programming in the fall to spring and summer. By far, music was the most common art form, presented by 94% of respondents. Following that, three disciplines are nearly tied: theater, family/student programming, and dance, each of which were presented by more than two-thirds of respondents. The average number of events was 18 and the median was six events during a season. A total of 96% offer some free events, with more than half offering 1 to 10 of them. Respondents' opinions about offering free programming were fairly—but not overwhelmingly—positive. There was a three-way split

between respondents who felt free programming fulfilled their mission to serve their broad communities, those who felt that audiences devalued free events, and those who had mixed attendance levels at free events. Around 150 respondents (37%) left many of the questions in this section blank. It appears that questions that required specific numbers were less likely to be completed than those asking for commonly known information or opinions. Nearly half rent their venues and 40% own venues.

E. Audiences and Attendance. This section looks at overall attendance as well as audience types and demographics, and respondents' mission statements, as they relate to audiences. More than 60% of respondents draw fewer than 25,000 audience members per year. More than 60% have fewer than 15,000 paid audience members. Ten organizations present all events for free. Nearly half (47%) of all respondents have primary audiences who are 55 and older. The second most prevalent group (20%) is an even mix of older adults, younger adults and families. More than two-thirds (70% or 268) have audiences who are primarily white/Caucasian. The majority of organizations (85%) have missions that include broad language about welcoming "everybody" or diverse populations into their venues. A look at audience type, by mission language, reveals that respondents who reach ethnically diverse audiences were more likely to name, in their mission statements, people of color as well as other groups, including disabled, LGBTQIA and low income.

Most respondents (85%) reported experiencing challenges in attracting younger audiences, and many described efforts to address this challenge. The most common was to program, intentionally, in ways that appeal to a younger demographic, for "all" audiences or to diversify programming. A few mentioned presenting artists who they described as younger, emerging or "edgier," or popular and/or commercial acts, particularly music. Some described offering unique events and/or events in uncommon venues that appeal to younger audiences. A small number described strategies of pricing, hiring younger staff and/or including younger people in planning their seasons or events. Finally, more than 50 respondents mentioned collaborations with organizations and/or groups aimed at increasing participation of younger audiences.

F. Community Engagement: Forms, Strategies and Challenges. About three-quarters of respondents offer four forms of engagement for their audiences or communities: partnerships with other organizations to generate and diversify; K-12 programming; free programming; and/or conversations with artists or experts. By far, respondents' largest current partners are educational, primarily K-12 and secondarily colleges; nearly 60% partner with seniors' groups. Regarding how their broader environment informs their programming decisions, many tended to offer similar, brief comments about programming in a manner that presents "diverse" artists and/or attracts diverse audiences, with some mentioning equity and inclusion. A smaller group proposed more intentional strategies, such as offering programming that is relevant, creates empathy and awareness, occurs in nontraditional venues, or targets specific cultures and demographics. A few wrote of programming in response to the current national political climate and a smaller theme emerged: the need to program for conservative audiences or to avoid political controversy altogether. The biggest challenge in audience engagement, reported by about three-quarters of respondents, is low attendance for events. Nearly half found that audience engagement requires too much labor and other costs. A quarter of respondents offered comments that shed additional light, including the lack of available staff to plan time-intensive engagement activities, coupled with the tensions that sometimes exist among different departments, when staff is expected to collaborate on engagement activities. In contrast, a prevalent theme, particularly among independent presenters, was their *lack* of challenges, and positive experiences with offering engagement activities. One advised that "if you don't encounter challenges you aren't taking chances."

G. Needs and Final Thoughts. SAMPs were asked about their opinions on a list of statements about their strengths. Nearly all respondents agreed that SAMPS are committed to presenting artists of the highest quality; navigate many challenges; manage limited budgets; know their communities; and can be thought of as small and mighty, given their abilities to stretch budgets and solve problems. Respondents were asked if given another $100,000 per year, to be used in any way that they wished, how they would use it. Most would spend it on staffing or staffing in combination with programming. When asked about their challenges, SAMPs' top limitations appear to be in areas focused on their external relations, including garnering money, partnerships and audiences—areas that involve developing or nurturing relationships with funders, organizations, patrons and audiences. Respondents appear less limited in controlling their internal management, including staff retention, making progress in addressing diversity, or producing standard engagement activities.

Respondents were informed that APAP is considering ways to address the needs of SAMPs and were asked to indicate their interest level in range of needs. Nearly all respondents to this question registered interest in nearly all needs. The most interest—both in numbers and intensity—was for a funding initiative that would serve SAMPs. The second highest interest was cost-effective access to the APAP conference. The next three—with nearly identical interest levels—were about peer sharing in marketing, audience engagement, and/or through forming a peer group. If respondents were interested in being part of a cohort, they were asked to indicate what purposes it might serve: for the majority—81%—a cohort would simply allow them to connect with peers. Knowing that most presenters use a combination of methods to select artists, respondents were asked for their single, most preferred way; nearly half (45%) rely on some form of live viewing, either through showcases or live performances, and 28% rely on some form of personal vetting. A through-line among comments was the value of recommendations, which might come from a trusted manager, agent, staff, faculty, patrons, peers or peer networks, audience members or, in rare instances, artists themselves. One-quarter of those who offered final thoughts thanked APAP and the regional organizations for conducting this survey, for their interest in SAMPs, and look forward to using and sharing the information generated by this survey.

Recommendations. Recommendations were developed with APAP staff and are presented for consideration, at the time of COVID-19. SAMP leaders likely are living under a time of stress and uncertainty, regarding when or if their facilities will open in 2020, what life will be like when they do open, and how they will pay for artists, staff and maintenance. Within that context, the following are offered: Advocate for SAMPs' presence within the presenting field and their value to artists and audiences by featuring them in publications, conference sessions, and on social media, such as via an Instagram campaign. Monitor innovation and solutions that SAMPs are developing to present artists as their communities begin to reopen. Convene cohort(s) of SAMPs, on a regional basis and/or during the APAP conference. Offer ways for SAMPs to exchange ideas about artists they might book, through virtual showcases, compiling referrals to artists and in other ways. Launch and facilitate a dialogue to foster successful relationships between agents and SAMPS by asking agents to respond to this report and help design responses. Create infographics that illustrate what the arts field needs to know about SAMPs including their average annual budget and number of staff, as well as number of events and artists presented each year. Design a funding initiative that, in this time of COVID-19, supports innovation in the presenting field, including SAMPs.

Introduction

The Association of Performing Arts Professionals (APAP), is pleased to present new, national research intending to benefit a segment of the field that has, at the national level, been largely overlooked: small and midsized presenters or, as they have become known over the past year, SAMPs. Though they exist within its membership, APAP—and the field at large—had not explicitly focused on research to represent them or services that they might need. Findings will inform APAP's decisions for future service provision and programs. Moreover, APAP intends to continue learning from the views of these presenters, which are not prevalent within its membership, so that their voices and perspectives could be known and considered.

In 2018-2019, with the support of the Wallace Foundation and the involvement of Western Arts Alliance and Arts Midwest, APAP commissioned CCA to conduct formative research on small and medium-sized presenting organizations. The goal of that initial research was to explore issues impacting the work of these presenters, particularly their efforts to build and engage audiences in their communities. Findings illuminated their circumstances and offered insights for APAP and the field, when it was shared in January 2019 in two packed sessions at the APAP conference. At that early stage in its research, APAP opted for a design that would allow for open exchange with presenters, using a combination of focus groups and individual interviews. Though the small sample was selected purposefully to elicit a range of views from presenters of different budget sizes, locations and organizational structures, it was not representative of all or even most small and midsized presenters in the U.S. Typically, initial qualitative research provides rich insight and content for large surveys, which help determine if the initial findings hold true for the larger population—in this case small- and medium-sized presenters around the country.

Out of that formative study, again with the support of Wallace Foundation, APAP has broadened the research by administering this larger-scale quantitative study of small and midsized presenters in the United States. Survey questions are based on the findings from the focus groups and allow for more people to weigh in with their structures, stories, challenges, needs, and opinions.

Because SAMPs are located throughout the country, APAP was committed to launching a nationally coordinated effort, involving leaders from across the U.S. as study partners. In addition to APAP, these partners included five of the six regional arts organizations (RAOs) and three presenter networks. Study partners are in direct contact with SAMPs and could not only connect APAP with respondents but add insights that greatly improve the quality and relevance of the study.

Questions to be addressed were:

- What is the **general distribution** of small and midsized presenters (or at least those that APAP can identify and access)?
- What are their **working structures** including types of organizations, operating budgets, staff size and roles, types and sizes of venues, and other such defining characteristics?

- What is the **current context** in which these presenters are working, including circumstances, challenges and opportunities?
- What are any **changes that presenters observe in their broader communities, or within their organizations**, particularly if those changes influence the way in which they do their work?
- What are any **misconceptions** about the ways in which they work?
- What are any **needs** of these organizations that APAP or the RAOs might be able to address?

Selection and Qualification

The study was open to nonprofit presenting organizations with budgets from $50,000 - $2 million, and that pay at least $25,000 per year in artist fees. This budget range was determined by APAP staff in conjunction with the RAOs and advisors. (Study partners grappled with the definition of small and midsized: depending on a presenter's location, including region as well as whether they were in an urban or rural setting, the budget cap of $2 million might indicate a large organization, rather than a small or midsized one. And, these three measures do not address other factors, such as the number of events offered by the presenter.) To begin the selection, study partners developed lists of organizations that they believed met the above criteria, based on their knowledge of their constituents and field; selectees were their members, attendees at past conferences or colleagues. From those lists, and additional steps, a purposeful sample of 1,988 organizations were prequalified for recruitment, based on limited budget and other information available. (Refer to Appendix B. Methodology.)

A thorough recruitment process took place over two months. First, study partners introduced the survey to their communities, lending credibility and increasing the likelihood that respondents would complete it. Their introductions were followed by five rounds of emails, both through the survey platform as well as through a regular email service (to bypass the firewalls that block survey platforms). Some of these rounds included reminders from the study partners. A postcard was sent through regular mail. Appealing incentives were offered, including raffles for eight free conference registrations, one for each of the six regions, to the APAP 2021 conference and one to each of the two 2021 regional conferences (Arts Midwest and Western Arts Alliance). In addition, knowing that giveaways motivate some respondents a premium of a free SAMP hat was offered to all who completed the survey.

Of the 1,988, a total of 606 or 30% responded to the survey. To ensure that respondents fully matched the criteria for the study, at the beginning of the survey they were asked to provide their organization type, budget range, and artist fees paid. From that process, 410 (21%) qualified on all criteria. (Refer to Appendix B for more details.) Only one survey response was allowed per organization. In some ways, the prequalification process underscored the lack of consistent or accurate information available about SAMPs, including budgets, staffs and working structures. A goal of the study is to begin to gather that missing information.[1]

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[1] Due to this missing information and the purposeful nature of this sample, as well as the lack of comparable data on larger populations of SAMPs, it may not be possible to fully assess the representativeness of this sample, as compared to the larger population of SAMPs across the country. Refer to Appendix B. Methodology.

About this Report. Findings are presented in seven sections. Section A begins to create a collective map of the respondents, including their organization types, years founded and budgets. A scan of their geographic distribution confirms their spread across the country. Because SAMPs are often less visible than larger presenters, Section B begins to create a picture of the communities where they live and work. SAMPs tell their own stories about those communities, including changes they have experienced in their local environments in recent years. Since little data existed on how SAMPs are staffed, Section C looks in some detail at staff size, structure, and changes in staffing over the past few years as well as the multiple roles played by their staff. Here, the SAMPs tell their own stories about how they carry out their jobs, revealing some of their biggest challenges. In section D, SAMP respondents report the numbers of venues they run, events they present, and artistic disciplines they offer, and their opinions about offering free programming. Section E gives an overview of their attendance and audience types and SAMPs weigh in about the challenges they face in reaching younger audiences. In Section F, SAMPs reflect on their audience and community engagement efforts, including strategies, types offered, partners, how their communities influence design, and challenges in offering audience engagement. Finally, in Section G, SAMPs reflect on their capacity and needs, as well as responses that APAP and/or the RAOs might take. They end by sharing their final thoughts on and gratitude for this research.

Since the SAMP study was designed and data were gathered, a national crisis has beset our country, including the presenting field: the COVID-19 pandemic. We are living through the harsh reality of a plummeting and uncertain economy, resulting in what are, hopefully, temporary closures of many arts organizations, and questions about how the presenting industry will do its work in the coming year. APAP and CCA felt that the responsible choice, within a national study, was to recontact respondents and obtain feedback on how the pandemic was affecting them, so that that perspective could be included. This data is presented in an supplement.

In many ways this study confirms what was stated in the focus groups: SAMPs are small and mighty. They were founded across nearly two centuries. Many are located in rural areas, though they also are present in urban and suburban communities. They are all around us, sometimes well-known in their small towns and sometimes hiding in plain sight in urban areas. Most have budgets of well under $1 million and most are run by three or fewer full-time staff. They play multiple roles in their organizations and communities, which can be interpreted either as their biggest challenge or as evidence of leadership. They are aware of and concerned about the ways in which larger societal issues, particularly gentrification, but also politics and immigration, affect the people who live in their communities. They have, within their limited capacity, experimented with ways to reach younger and new audiences and engage communities. Some, particularly those nestled within larger structures of colleges, struggle to control their own working environments and stabilize budgets. They value having their voices heard, desire ways to interact with and learn from each other, and wish that others better understood their impact as well as their limitations.

A. The SAMP Landscape: Respondents' Organization Types, Sizes, Ages, and Locations

This first section begins to create a collective picture of the respondents, including their type of organization and when these organizations were founded. Budget figures, for their overall organizations and artist fees, provide some sense of their financial capacity. Then a scan of their geographic distribution, including regions and states, confirms that they are spread out across the country.

Organization Type. In order to qualify for the study, respondents could choose one of four organization types:

- Independent presenting organization with its own 501(c)3 designation.
- Presenter affiliated with college or university, but with its own 501(c)3 designation.
- Presenter within a college as a program or project but without its own 501(c)3 designation.
- Presenter that is a unit of government, such as a venue operated by a city or county.

Respondents by Type of Organization (n=410)

10%

7%

26%

57%

- Independent
- College
- College with 501(c)3 Status
- Unit of Government
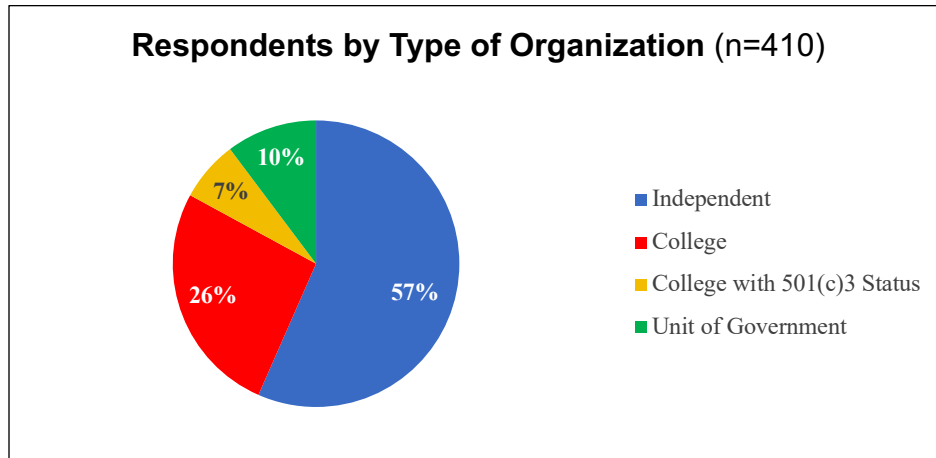
More than half of respondents are independent 501(c)3 organizations, as shown on the blue slice above. Of them, a few are artist ensembles that also present. More than one-third are affiliated with colleges, either as programs or with (c)3 status, as shown in the red and yellow slices. Units of government comprise a smaller group, in green, and most are city and county facilities.

Year Founded. If part of a larger organization such as a college, respondents were asked to provide the year their presenting office or department began. The graph below shows the breakdown.

Year Founded, by Organization Type (n=397)
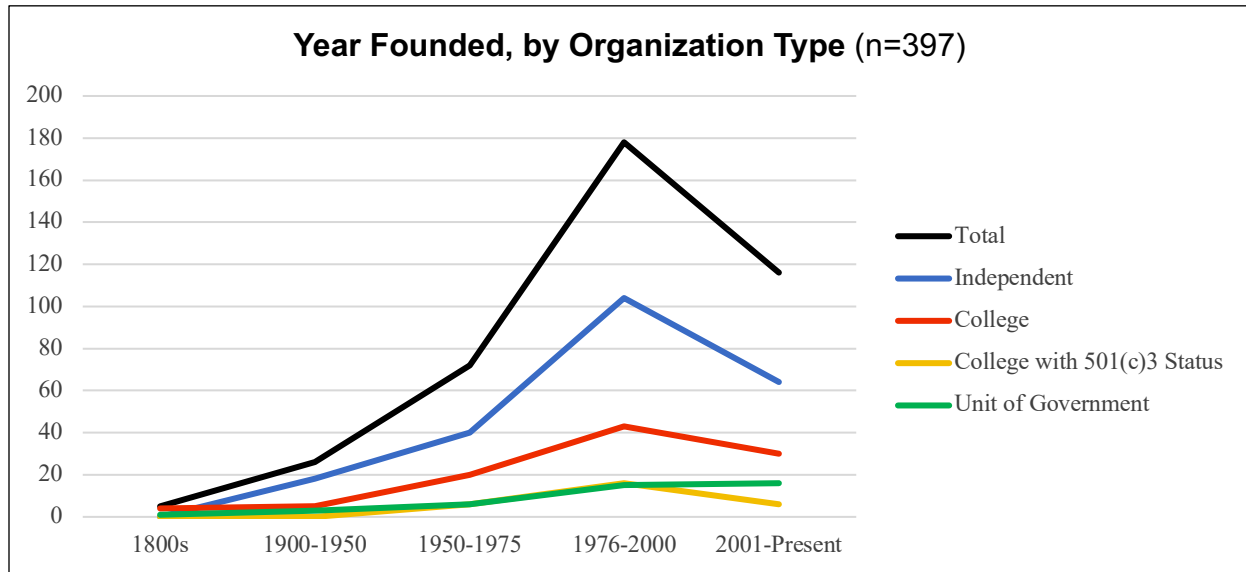
Respondents' organizations were founded over 172 years, or nearly two centuries, from 1847 to 2019. Of the five organizations founded in the 1800s, four are colleges and one was a unit of government. Few organizations (7%) were founded in the first half of the 21st century.

By far the largest percentage of organizations—45%—were founded between 1976 and 2000, soon after the creation of the National Endowment for the Arts in 1968. At least for the SAMPs in this study, in the years after the NEA's founding a sharp increase occurs in the founding of all types of organizations, but particularly independents. All types of organizations follow a similar pattern across the years. The number of all types of organizations dropped from 2001 to present, but still accounts for 29%.

It is important to note that the information here describes the respondents in this study only and should not be used to draw conclusions about overall founding dates of the country's presenting organizations.

Respondents' Budget Size. Respondents were asked to share their largest annual budget over the past three years. They were allowed to estimate, and larger entities, such as colleges, were advised to share their budgets for presenting activities only.
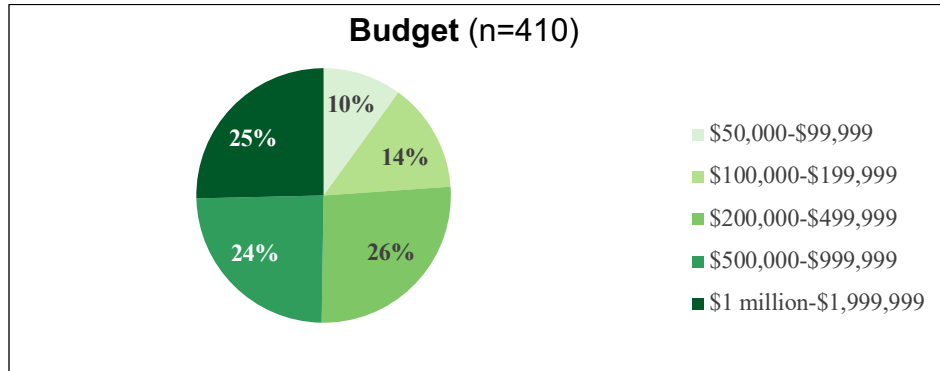
Budget (n=410)

Legend:
- $50,000-$99,999
- $100,000-$199,999
- $200,000-$499,999
- $500,000-$999,999
- $1 million-$1,999,999

Values shown: 10%, 14%, 26%, 24%, 25%

Three quarters have budgets of less than $1 million and half have budgets of less than $500,000. A notable portion—nearly one-quarter—have budgets less than $200,000. Together, these statistics confirm that the sample is comprised primarily of small-budget organizations.

Annual Artist Fees. Respondents were asked to identify, over the past three years, the most their organizations had paid in total annual artist fees in any single year. Of them **close to half— 43%—have annual artist fee budgets of less than $100,000.** Only a small proportion—7%— pay their artists, in total, at or more than $500,000. There was an even, three-way split between those whose budgets are $50,000-$99,999, budgets of $100,000-$199,999, and budgets greater than $200,000.

Annual Artist Fees (n=407)

14%, 29%, 29%, 22%, 7%

Legend:
- $25,000-$49,999
- $50,000-$99,999
- $100,000-$199,999
- $200,000-$499,999
- $500,000 or more
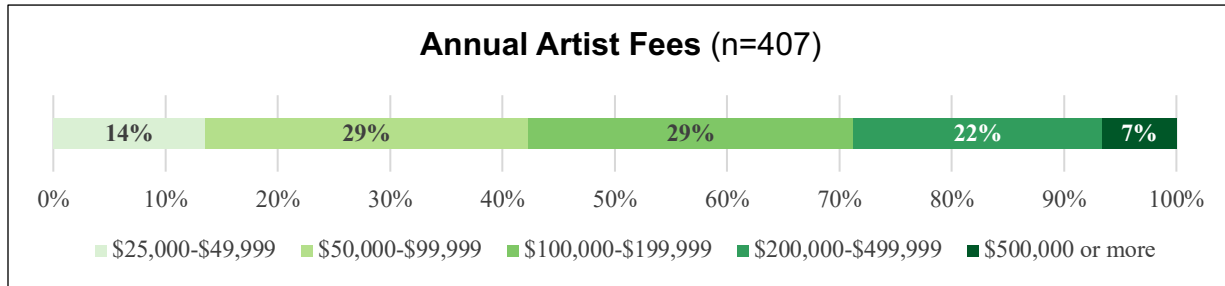
Typical Artist Fee Range. Respondents were asked to provide the typical, or most common fee they pay for an artist or engagement. They could choose one of four fee ranges.

Typical Artist Fee Range (n=403)

24%, 33%, 34%, 9%

Legend:
- Under $5,000
- $5,000-$9,999
- $10,000-$19,999
- $20,000 or more
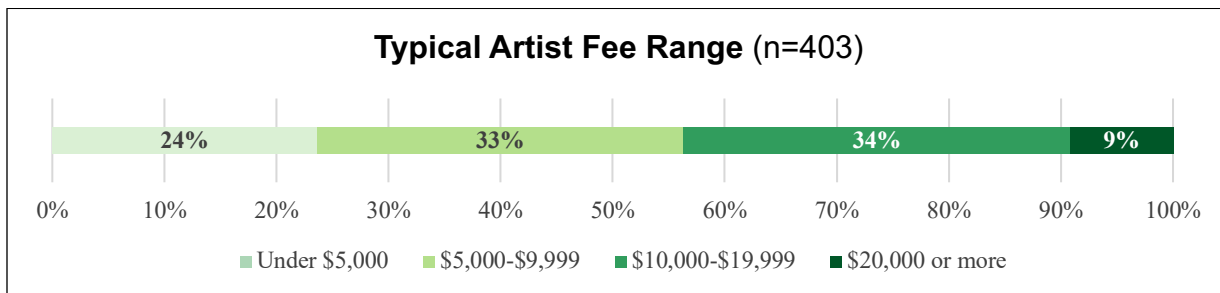
Well over half (57%) typically pay artists less than $10,000. The typical artist fee for nearly one-quarter of SAMPs surveyed is less than $5,000. Only a small fraction—9%—typically pay artists $20,000 or more.

Earned and Contributed Income. Respondents were asked the percentage of earned to contributed income for the most recently completed year (either calendar or fiscal). Data are presented by type of organization. **According to available data, all types follow the same general pattern:** about one-quarter have less than 25% earned income; about one-third have 25-49% earned; another third has 50-74%; finally, a low percentage earn 75% and over of their income. (Contributed income follows the opposite pattern and is not shown.)

Earned Income: Total By Organization Type (n=258)

Organization Type	Under 25%	25-49%	50-74%	75% and Over
Total of All (258 of 410)	14%	39%	31%	16%
Independent (211 of 232)	13%	41%	32%	15%
College (17 of 108)	12%	29%	24%	35%
College with 501(c)3 status (13 of 28)	15%	46%	23%	15%
Unit of government (17 of 42)	29%	24%	29%	18%
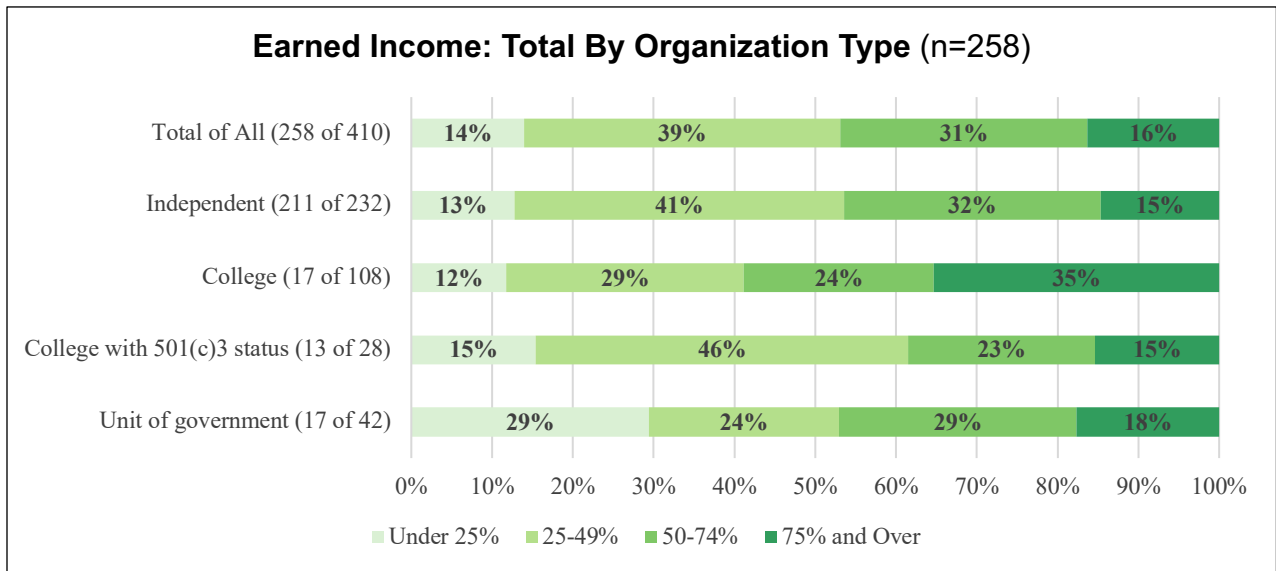
However, as shown below, the sample is mostly independent organizations, and very few of the colleges (16%) are represented.

Organization Type
Respondents to this Question, Compared to Overall Pool

Legend: Independent | College | College with 501(c)3 Status | Unit of Government

This Question: Independent 82%, College 7%, College with 501(c)3 Status 5%, Unit of Government 7%

Entire Sample: Independent 57%, College 26%, College with 501(c)3 Status 7%, Unit of Government 10%
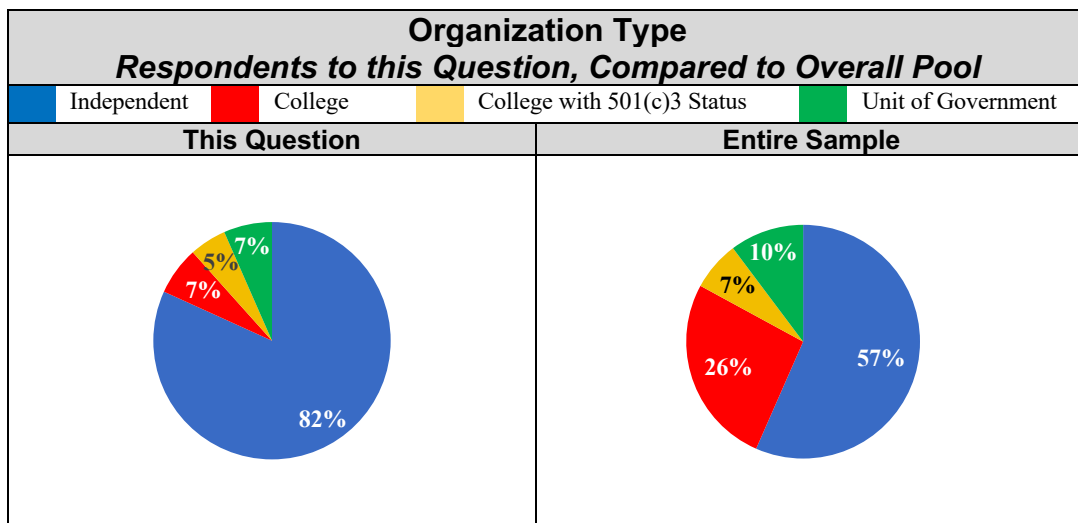
Organizations by State or Territory. All but two states (Alabama and North Dakota) are represented. The states with the largest numbers of respondents are New York (30) and California (31).
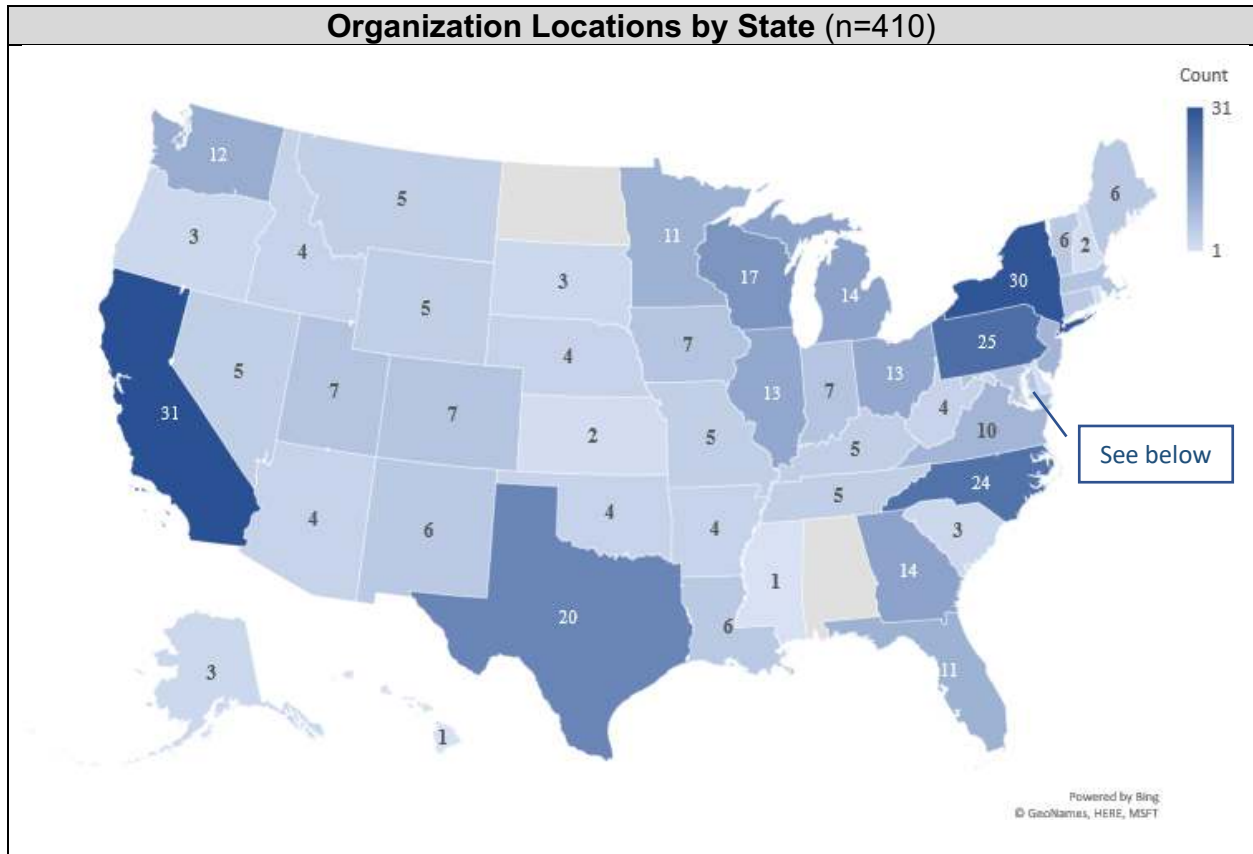
Some of the counts for states and territories do not appear on the map and are:
- Connecticut (6)
- Delaware (2)
- District of Columbia (5)
- Maryland (7)
- Massachusetts (7)
- New Jersey (10)
- Rhode Island (2)
- Virgin Islands (2)

Zip Codes. The 386 respondents who provided them represent 377 different zip code areas (nine of these zip codes contain two respondents each).

Region. Respondents provided the region in which they are located according to the areas served by following regional arts organizations:

- Arts Midwest—IA, IL, IN, MI, MN, ND, OH, SD, WI
- Mid-America Arts Alliance—AR, KS, MO, NE, OK, TX
- Mid Atlantic Arts Foundation—DC, DE, MD, NJ, NY, PA, VA, VI, WV
- New England, including APNNE and NEP—CT, MA, ME, NH, RI, VT
- South Arts—AL, FL, GA, KY, LA, MS, NC, SC, TN
- Western States Arts Federation—AK, AZ, CA, CO, HI, ID, MT, NM, NV, OR, UT, WA, WY

Over two-thirds of responses came from areas covered by three regional organizations. As shown below, a view by the population of these regions shows a similar breakdown, but with a larger proportion in New England.[2] However, a view by geographic spread[3] shows a very different breakdown for the West, which represents nearly half of the country.

Regional Breakdown of Respondents (n=410)

- Western States Arts Federation (WESTAF)
- Mid Atlantic Arts Foundation (MAAF)
- Arts Midwest (AMW)
- South Arts (SA)
- Mid-America Arts Alliance (MAAA)
- New England, including APNNE and NEP

Regions, by Population (Est. 2019)

Square Miles, Per Region

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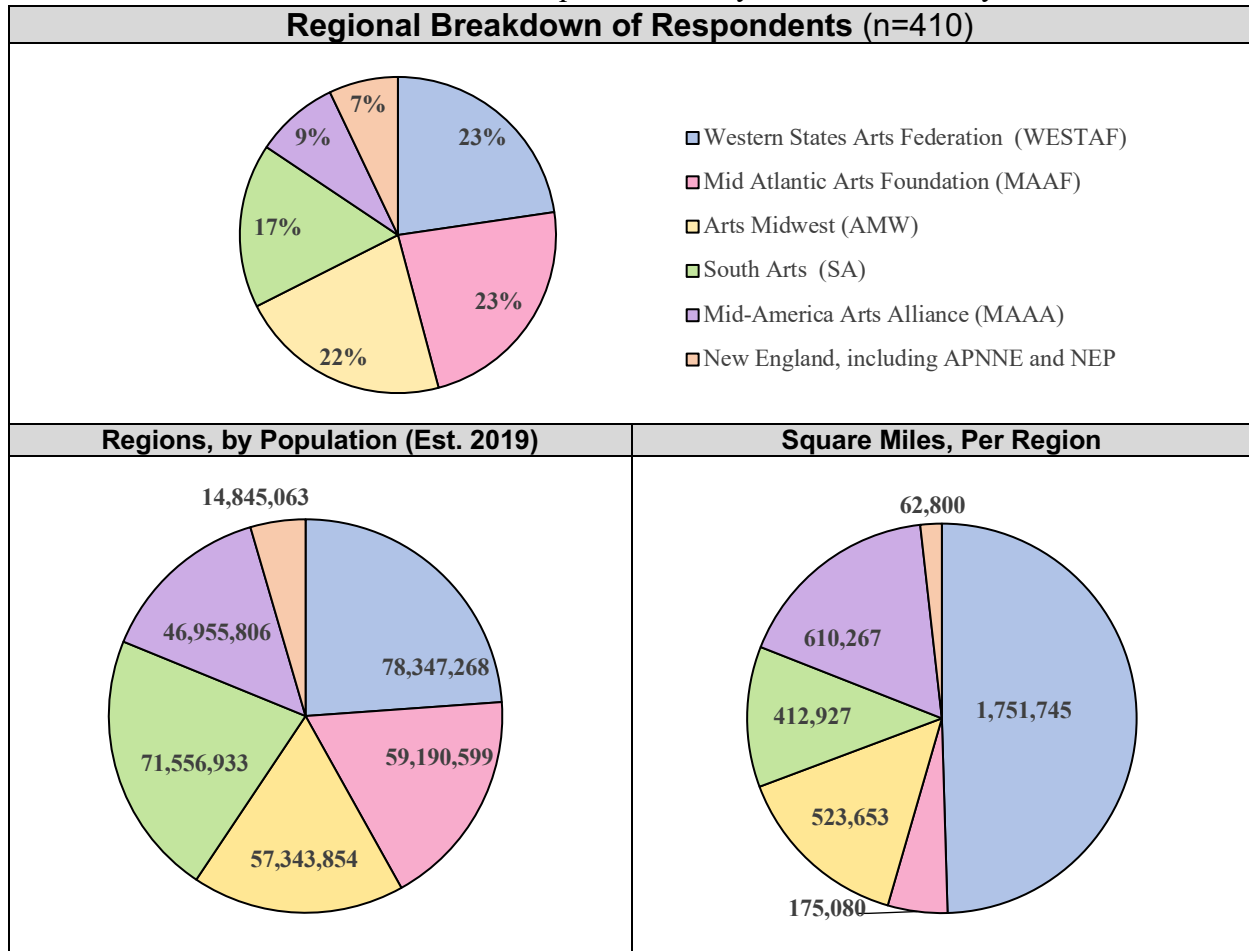
[2] Annual Estimates of the Resident Population for the United States, Regions, States, and Puerto Rico: April 1, 2010 to July 1, 2019 (NST-EST2019-01). Source: U.S. Census Bureau, Population Division. Release Date: December 2019.

[3] https://state.1keydata.com/states-by-size.php

B. A Closer Look at Community: Types and Changes

SAMPs are spread out across the country, less known than larger presenters, and had not been well represented in other studies. Therefore, the study focused on the type of communities where they reside, so that a more nuanced picture could be created of their locations, environments and context in which they work. Then, the SAMPs begin to tell their own stories of the communities in which they work, including changes they have experienced in their local environments in recent years.

Type of Community. Acknowledging that many communities are mixed, respondents were asked to check the primary community in which their organization is located: rural, urban, suburban, or other types.
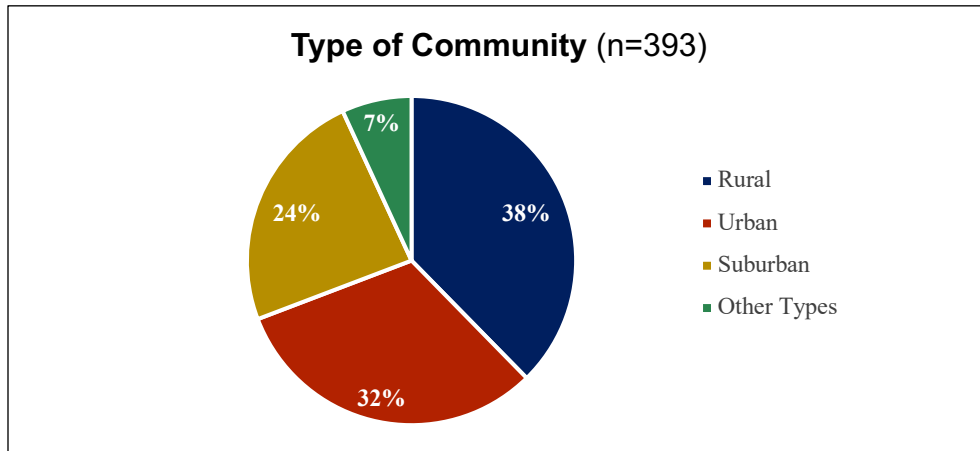
Type of Community (n=393)

Respondents were roughly split into thirds: 1) rural, 2) urban and 3) both suburban and other types combined. **The largest portion—38%—are in rural locations.** For the 27 who selected Other, respondents' comments described locations that include a combination of a small town with rural surroundings (10); a small city or town (5); college town (4); or resort (4). One described a unique combination of being in the state capital in a remote state and "isolated with no land road connecting to rest of state." Another wrote of being "very, very rural" and another is not located where most of its presenting activity takes place.

A Closer Look by Region. Overall, most regions exhibit the same pattern of community types as the overall data set. Several slight exceptions: Mid Atlantic Arts Foundation and Mid-America Arts Alliance, have a higher proportion of urban organizations and Arts Midwest shows a slightly higher percentage of rural and suburban organizations. Note that the Other category represents 27 respondents, as described on the prior page. (Refer to page 15 for a breakdown of the states in each region.)

Community Type Breakdown by Region

For Entire Sample Combined (n=410)

Rural	Urban	Suburban	Other Types
38%	32%	24%	7%

Legend: ■ Rural ■ Urban ■ Suburban ■ Other Types

Percentage of Region (n=393)

Region	Rural	Urban	Suburban	Other Types
Western States Arts Federation	38%	31%	24%	8%
Mid Atlantic Arts Foundation	38%	37%	22%	2%
Arts Midwest	42%	24%	21%	13%
South Arts	40%	28%	28%	3%
Mid-America Arts Alliance	28%	42%	25%	6%
APNNE & NEP	31%	34%	24%	10%

Percentage of Overall Sample (n=393)

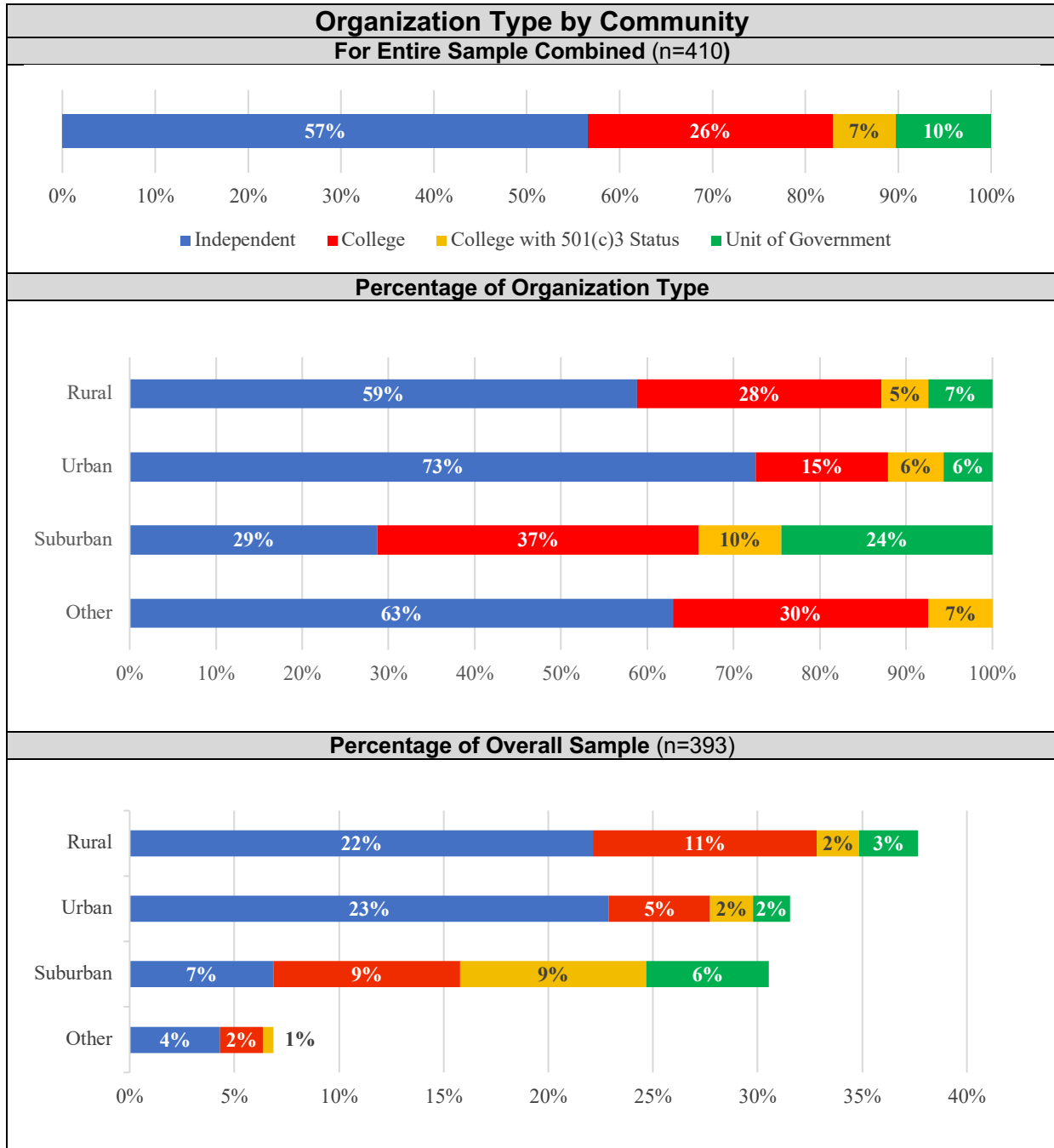| Region	Rural	Urban	Suburban	Other Types
Western States Arts Federation	8%	7%	5%	2%
Mid Atlantic Arts Foundation	9%	8%	5%	1%
Arts Midwest	9%	5%	5%	3%
South Arts	7%	5%	5%	1%
Mid-America Arts Alliance	3%	4%	2%	1%
APNNE & NEP	2%	3%	2%	1%

Budget Range by Community Type. The graphs below compare the overall budget breakdown for the overall sample to each of the four community types. Each community type follows the same general pattern, with a few exceptions: though only one-quarter of all respondents have budgets above $1 million, and one-quarter have budgets of less than $200,000, Urbans have a disproportionately high number (34%) at the highest budget level and a disproportionately low number (18%) at the lowest budget levels. Rural organizations have a disproportionately low number (17%) at the highest level, and a disproportionately high number (30%) at the lowest levels. Again, the Other category represents 27 respondents, as described above.

Budget Breakdown by Community Type

For Entire Sample Combined (n=410)

10%	14%	26%	24%	25%

0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%

- $50,000-$99,999
- $100,000-$199,999
- $200,000-$499,999
- $500,000-$999,999
- $1 million-$1,999,999

Percentage of Community Type (n=393)

Rural	15%	15%	30%	23%	17%
Urban	7%	11%	25%	23%	34%
Suburban	6%	18%	20%	27%	29%
Other	15%	11%	33%	22%	19%

0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%

Percentage of Overall Sample (n=393)

Rural	6%	6%	11%	9%	6%
Urban	2%	4%	8%	7%	11%
Suburban	2%	4%	5%	6%	7%
Other	1%	1%	2%	2%	1%

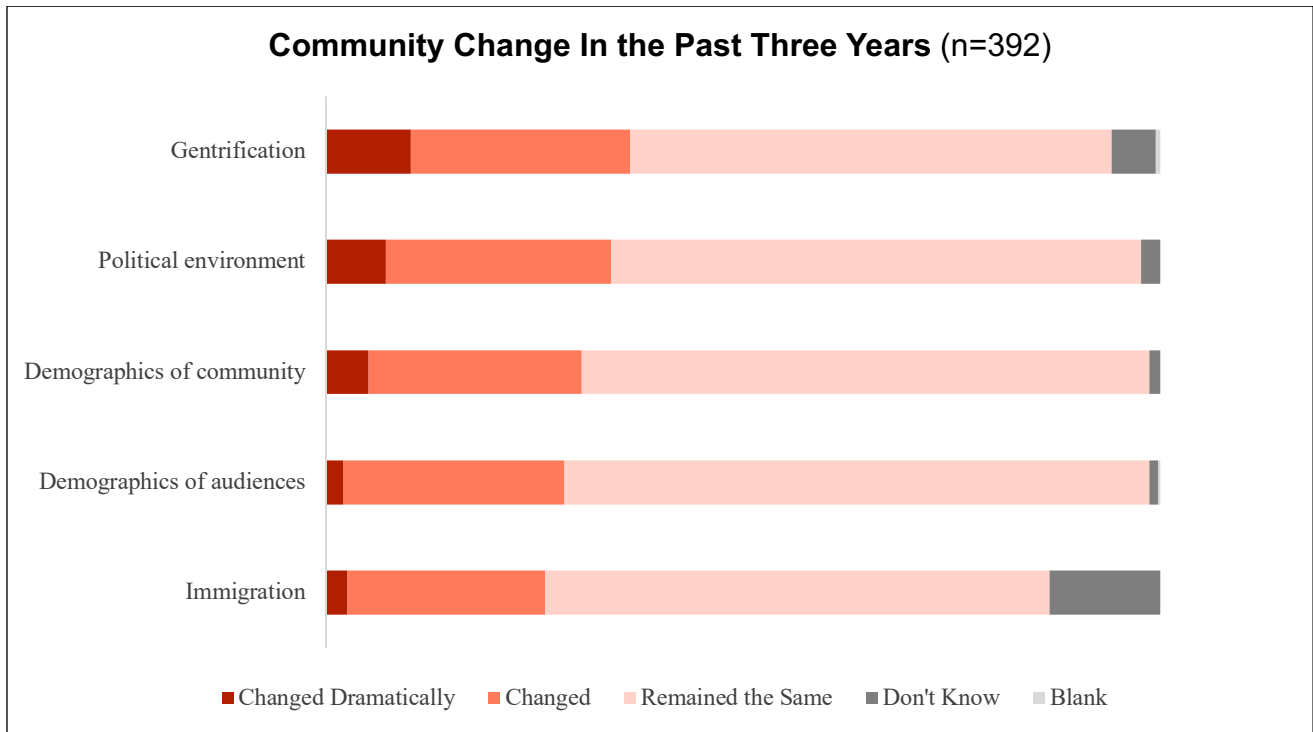0% 5% 10% 15% 20% 25% 30% 35% 40%
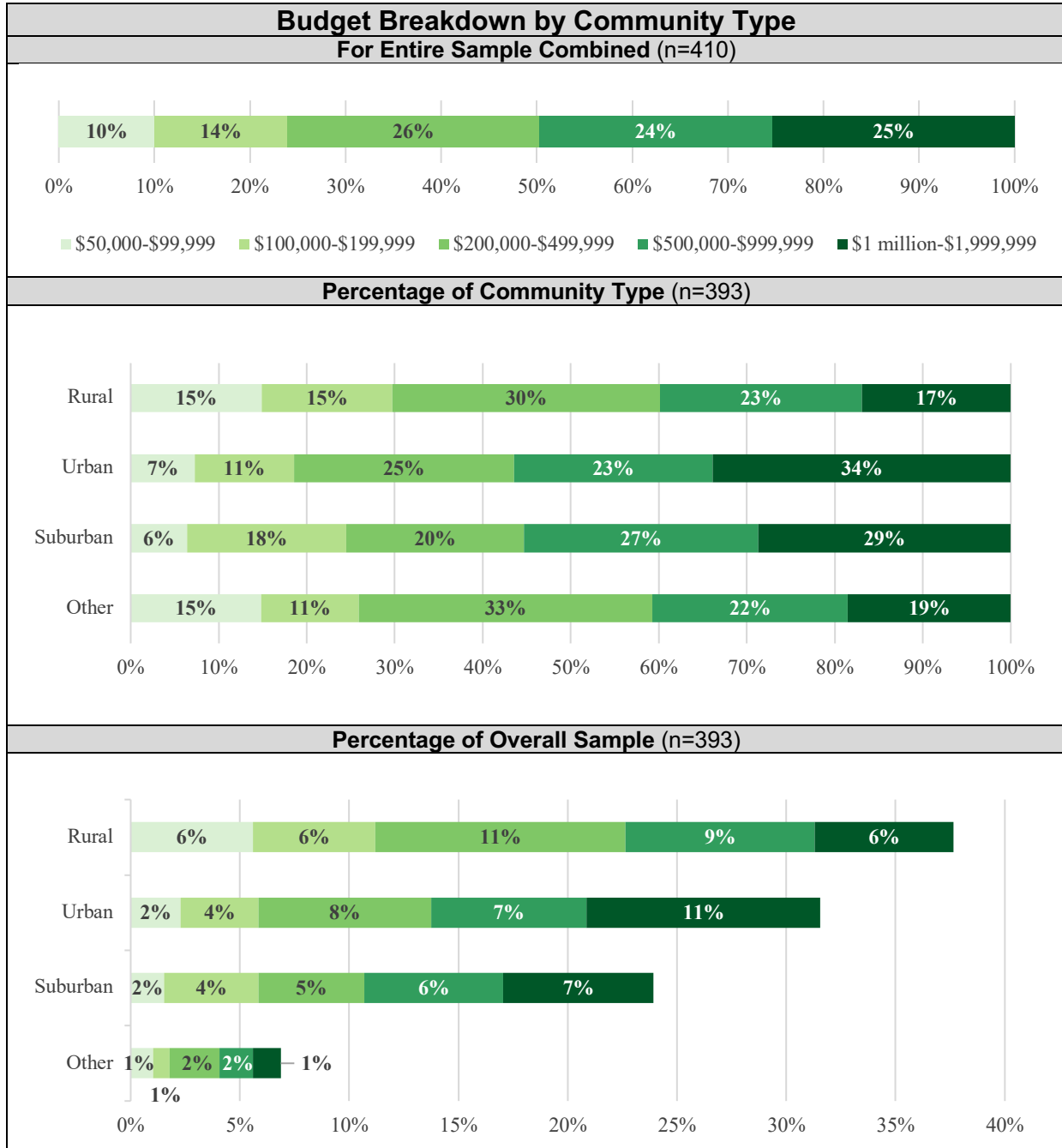
Organization Type by Community Type. A breakdown of the overall sample, by organization type, is followed by a breakdown by community type. Again the Other category represents 27 respondents, as described above.

- Rural communities exhibit a similar pattern to the overall sample.
- Urban communities have more independent organizations and fewer colleges.
- Suburban areas have more colleges and fewer independents.

Organization Type by Community

For Entire Sample Combined (n=410)

	Independent	College	College with 501(c)3 Status	Unit of Government
Entire Sample	57%	26%	7%	10%

Percentage of Organization Type

	Independent	College	College with 501(c)3 Status	Unit of Government
Rural	59%	28%	5%	7%
Urban	73%	15%	6%	6%
Suburban	29%	37%	10%	24%
Other	63%	30%	7%	

Percentage of Overall Sample (n=393)

	Independent	College	College with 501(c)3 Status	Unit of Government
Rural	22%	11%	2%	3%
Urban	23%	5%	2%	2%
Suburban	7%	9%	9%	6%
Other	4%	2%	1%	

Community Types and Changes. Now, the study shares respondents' impressions of their communities, in their own words. Respondents were asked to choose if, and how much, five aspects of their community had changed in the past three years.[4] Respondents who indicated changes were asked to describe, in open-ended comments, what had changed. (In section F, respondents describe how they factor these changes into their programming and other decisions.) The graph below shows a composite of their impressions of change. Then, their comments tell stories, and give examples, of how these areas of change play out within their communities.

- Gentrification, including housing availability and cost, displacement of long-term residents, or increase in commercial establishments
- Political environment, either local politics or the effects of national politics
- Overall demographics of community, including race, ethnicity, age, income level or other characteristics
- Overall demographics of audiences
- Any impacts of immigration

Community Change In the Past Three Years (n=392)

Legend: ■ Changed Dramatically ■ Changed ■ Remained the Same ■ Don't Know ■ Blank

The color saturation above reflects their close-ended choices. Across the five areas of change, the patterns are quite similar. As indicated by the two darker shades of red, **one-quarter to one-third experienced some degree of change in one or more areas.** Gentrification was experienced by more respondents than other types of change. The color saturation also echoes

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[4] From the focus groups conducted in 2018, a small number of interviewees intimated that sameness can indicate challenges, or stagnant problems that are not improving. That line of questioning was not pursued in this study, due to the survey's length.

their composite comments, which convey a deeper sense of how they experienced those changes. About one-quarter of respondents experienced all areas either remaining the same (87) and/or they did not know if change had happened (33).

Most of the respondents who indicated change (266 out of 278) described their observations in writing. Though about one-quarter of the comments were short, general fragments, such as "audience has diversified" or "increasing diversity in community," about 200 were more descriptive in the changes they observed, and ways that those changes played out in their community. In general, there seemed to be a notable contrast in the tone of comments, depending on the organization's community (whether urban, suburban, or rural) and to a lesser degree their organization type.

Gentrification (111). **By far, the most frequently mentioned topic was gentrification, described by 111 respondents.** The breakdown of the commenters by community type appears below, illustrating that comments came disproportionately from presenters in urban environments. Respondents reflected on changes, related to gentrification, in their communities over time.

Gentrification Comments by Community Type

| Rural | Urban | Suburban | Other |

All Respondents (393) | **Gentrification Comments (111)**
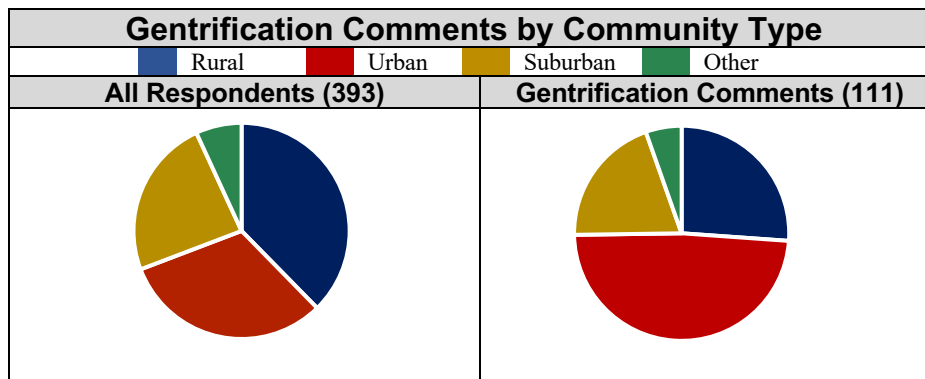
A small number recognized gentrification as an attribute, when it brought businesses that attracted young professionals and families, employment, tourism and other opportunities to their communities. Gentrification has brought jobs and related commerce in industries including medical, corporate, health, sportswear and high tech. An upstate New York presenter described a city that is growing, with "a lot of state money pouring in and new businesses opening every week." For a few rural organizations, gentrification means they have become bedroom communities for cities within commuting distance. A handful of college presenters experience gentrification as attracting younger staff and upgraded housing; one was happy for the "new construction of apartment complexes along the main road to our campus." Another suburban organization from the South wrote of the "downtown revitalization attracting younger patrons," including "newer housing appealing to millennials and Gen Z." A government presenter wrote optimistically about how a "new casino and restaurants in a thriving downtown, following 15 years of thoughtful economic development, have reinvigorated the county." Regarding tourism, a presenter in a small Southern town described a new equestrian center that brought "an active influx of equestrian professionals and enthusiasts," while others, from North Carolina to Napa, California, described new oceanfront developments and ski destinations, or other tourist interests and growth. Only a few of these optimists wrote of opportunities that might

have mixed results, such as one rural presenter who observed the "rebirth of an old mill that features craft beer and entertainment, most of it free," indicating that it might compete with the presenter's ticket sales.

Overwhelmingly, respondents' comments about gentrification reflected their deep concerns about how increased housing costs affect the makeup of neighborhoods, and particularly how it displaces longtime locals, including artists, people of color and those with low incomes. *For about half of all respondents, gentrification was their most passionate concern of all five areas.* Their concerns were consistent across communities and organization types. Most generally described dramatic increases in housing costs, which drive low-income residents out of the area. Some offered more graphic descriptions, including a Chicago suburban presenter who referenced "McMansions" and a Texas presenter in a large city, who wrote that gentrification has "displaced many of our long-time black neighbors, only to be replaced by whites and their dogs." A few suburban presenters spoke of the resulting "urban sprawl" fostered by gentrification.

For presenters **in large urban areas,** such as the Bay Area and Seattle, which have the highest cost of living, housing prices continue to soar, escalating the crisis. As one exclaimed, "housing costs are the highest nationally in our region and the median income is above $100,000, creating incredible financial challenges for artists and nonprofit workers to live here." Another in nearby San Jose referenced the growing income inequality in Silicon Valley, with Google and WeWork buying up downtown land. Yet another exclaims, "We are in tech central, middle and working class are being squeezed out. More homeless and people with addictions are living on the street. Immigrants are being demonized and are living in fear."

Others, **in midsized cities** reflect on the effects of gentrification, sometimes coupled with efforts to respond to them. One from the District of Columbia metro area wrote of the "displacement of nearly half of African-American families in the last decade. Commercial vacancies slowly being occupied. Housing costs increased substantially." As a result, the needs of immigrants are more apparent, with the community making some efforts to meet those needs. For another in a New England city, the ripple effect of gentrification over a decade has made it a "hip destination to visit and live, drastically driving rents so that it is increasingly harder for low income brackets to live in the city itself." Yet the city still offers "resettlement destinations for many in the international community, resulting in new populations, especially from Eastern Africa, injecting youth and diversity into a predominantly very old and very white state." Across the country, a Nevada presenter worries about how gentrification cuts their service provision, as it "displaces many families … we have trouble serving youth we once served in our outreach programs."

Some **college presenters'** views of gentrification reflect the younger demographic of students they serve. A presenter in a college town described how their community is trying to address gentrification, and the displacement of low-income people, by simply "building more." Another offered impressions of how "significant student luxury apartment construction in our downtown" meant that "two blocks of a blighted downtown spur have been revitalized into 'it' establishments. These changes are opportunistic elements that haven't really changed the fabric of town (other than there are more places to drink a beer or throw an axe now [yes, seriously])." A third college presenter in a mountain state wrote of experiencing "exponential growth, particularly of millennials," as well as exploding housing expenses, due to the surge in housing

costs in the large city 60 miles away: "Speculation in the housing market is creating a shortage of affordable rentals [in our city that] annexed an additional 18,000 acres for mixed use development, nearly doubling the size of the city." An independent presenter in a Midwestern college town wrote about the impact of "college town housing dynamics" on the area:

> The downtown core has experienced big influx of high-priced student housing. Installation of parking meters and demolition of a major downtown garage has meant increased difficulty locating and paying for parking. Increased homelessness has meant more transience, begging, health and sanitary issues on downtown streets. Conflicts about all of these issues has increased the acrimonious environment.

Rural presenters may feel the effects differently. For a handful, new large houses in their rural communities become second homes or destinations for wealthier people or larger homes for local residents. As one in Ohio said, "Most of the individuals moving into the county primarily work and play in the larger urban area in the next county over." For another, "Short term vacation rentals have significantly reduced workforce housing." For a few, these types of changes mean displacement by income-generating vacation and Airbnb housing. Continued cost-of-living increases in one island community make it "very difficult for low income workers to achieve home or property ownership."

Regardless of the locations or circumstances, a common concern emerged: displacement and where previous residents—particularly immigrants and people of color, and low wage workers—would go. An experience offered by a presenter in New York City clearly illustrates this concern:

> Harlem, New York, is the epicenter of change in our communities. Our community district has one of the highest percent of homeless children in schools. Yet, housing is changing dramatically, and rents/purchase prices are rising exponentially. Also, Harlem is not a destination in the tourism industry. Just a few years ago people would call the box office and ask is it safe in our neighborhood. Now, many of those people are living in this neighborhood.

A different New York presenter, who serves a predominantly Haitian community, experiences the "negative impact of political environment on our community both in the United States and Haiti. Historically Haitian neighborhoods in New York are being gentrified at a rapid rate."

Presenters in communities that attracted tourism—from North Carolina to California— recognized the double-edged sword of having a flourishing tourism industry, and the resulting displacement of wage workers who serve vacationers but can no longer afford to live in the communities where they work. As one in Montana wrote, "We are in a ski town, and there is a major push for commercial development in the area. As such, the cost of living has risen dramatically, and the access point for employees and lower income families has become increasingly more difficult." A Napa presenter wrote, "Tourism is still a huge factor in this economy." As hotels are built, "The rise in housing and rental costs has increased and many who work here can't afford to live here… Immigrants continue to be a more invisible community. The impact on immigrants will be revisited below. *Strikingly, all but one of the respondents did*

not mention concern about ticket sales within their writing about gentrification, implying that their concerns were about humans, not transactions or income.

Political Changes (72). Most respondents describe general changes in one or more of the following areas.

The biggest theme was the **trickle-down effects of the national election on local communities.** Some responses, particularly those in rural areas, described the impact of 2016 presidential election on community interactions and even audience behavior. *Some of the comments from rural presenters on this topic were particularly intense.* A rural Pennsylvania presenter observed that as "national political tension is felt locally, people [are] on edge in general." A rural Ohio presenter described the "Trump effect on schoolchildren, who are now openly racist" and "increased bullying." An organization in Maine surmises that the "national political brashness seems to have rippled down to local level. People could always work out differences and were respectful; now less so." Another rural presenter in Wisconsin observed these changes in the audience:

> [The] national political climate has affected how our audience members act at shows. They are more argumentative, and rude, and less well behaved than in previous years. More complaints, more attitude. [There is] less respect for venue staff, volunteers, musicians and other patrons. Also, security needs required by touring artists have increased in a large way.

Even a college presenter in California observed that a "larger conservative political climate has emboldened a few people to be critical of our programming due to our presenting of work exploring social justice and featuring artists of color and other marginalized communities." Another in Kentucky described how their community and state has become "more conservative, often looking for a reason to critique our shows based on race, gender, etc." Finally, a municipal presenter in rural Georgia faced layered challenges: "The national political environment and all of its nontraditional habits have trickled down to our local government. We feel the effects as we are a non-profit occupying a city venue."

General comments were made about the **shifting of local and state governments from red to blue, or vice versa.** Many referred to that shift without providing details. As one in rural Pennsylvania describes, "We were considered one of the counties that put Trump in office due to the change from blue to red." Another from Colorado noted the "political lines between those who live in town (approx. 19,000, more Democratic) and the county/rural area (approx. 25,000, more Republican) seems starker."

Another theme, mentioned by a few, was **local elections that changed leadership and priorities.** About half mentioned local governments in a general way, and a few mentioned local officials who have decreased funding for, or belief in, arts programs. For one in Wyoming, the implications for employment are dramatic: "the local power plant, which is the main user of coal will be shutting down in one year, which will lead to a loss of jobs." For another, political shifts happened when "local elections saw an increase in Democratic voters and … politicians from outside Nevada, who brought their ideas to take over the state."

Positive comments about politics were rare, and typically express pride in the presenters' liberal positions in contrast with its more conservative surroundings, as well as their responses to political tensions brought about by the national election. As a North Carolina presenter claimed, "we are in an uncomfortably red state; we are in a liberal bubble in that state and fly the flag of tolerance and diversity through the arts." When the national election "dramatically increased local tensions," a rural presenter in upstate New York countered by providing greater access to "international performances of great ethnic variety as a statement against the ugliness that became evident from the population of our white 'angry' residents of this community [which is] 98% white."

Demographics (60). **The majority of comments were general statements that communities had become more "diverse," with descriptors implying that respondents meant ethnically and (for a few) younger.** Some communities were diversifying quickly and some slowly. One in liberal Vermont observed that "a steady flow of new Americans has created a much more diverse atmosphere in which to live," whereas a college presenter in the same state simply stated that the "town is slowly diversifying." A suburban Pennsylvania presenter described a school system with "90 nationalities [as well as] 100% free breakfast and lunch." Ethnicities or countries mentioned by name were "Latinx," "Hispanic," "Somali," "African," and "Middle Eastern." Respondents typically went on to briefly assess whether they, or their communities, were responding to that diversity in any discernable ways. As a college in California acknowledged, "The demographics of the community have changed, however we have not been able to engage those growing communities as I would have liked. Fortunately, we are working on it." Folded into some of their comments was the displacement of lower-income peoples, which, they felt, unduly affected people of color, particularly Latinos, and were covered above in the section on gentrification.
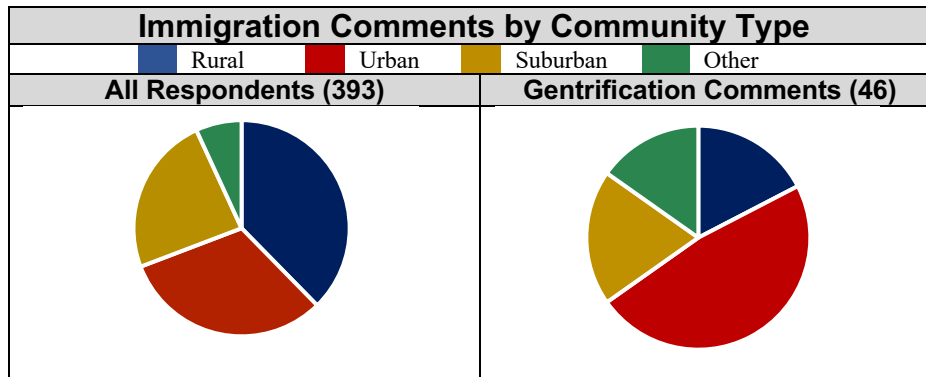
For a handful of respondents, changing demographics means increased industry, more skilled labor, including medical, college, and corporate jobs, and higher incomes. But in contrast, for a few, changing demographics means job loss. An independent presenter in Wisconsin shared how both sides of this story play out. Though four large medical hospital complexes and universities bring in "more skilled labor diversity," this presenter suspects that the farming and agricultural processing plants, which used to bring unskilled labor to work in factories and farms, have "changed with the immigration policy shifts and uncertainty" and that the "lesser skilled white population is feeling threatened, leading to an increasing polarization." A New York college presenter described an area where "one plant closing after another," including one of its largest employers, resulting in loss of "400 jobs…in a community of under 30,000." Another in Wisconsin simply stated that the "depressed industry lowered the standard of living" and a Pennsylvania college described "life in the Rust Belt [with] no economic growth," and that has a "mean income [that is] very low [and] youth do not stay in our area."

Audiences (53). Comments on audiences were simpler and predictable. **Respondents who commented stated that their audiences had become more "diverse," and defined or implied that diversity meant either by ethnicity or age.** Many attributed their success at attracting these audiences to their efforts to broaden programming. One common example was expressed by a presenter from a Georgia suburb: "Diversified programming is beginning to encourage

diversified audience. Still needs improvement." A college presenter on the east coast wrote, "younger, more diverse audience."

For most respondents who referenced younger audiences, comments were brief and nonspecific, but they seem to be moving from audiences over sixty to those of parenting age. For a New York college, the "audience was traditionally 60-plus, and is now closer to 40-plus years old." A government presenter in Illinois stated, "Our audiences are starting to skew slightly younger as … [our] older population ages out." A few others referenced "out of town ticket buyers," with a rural Idaho presenter boasting that "59% of patrons come from outside our zip code." A small number referenced increases in family attendance, such as one who wrote, "We adjusted programming to increase offerings to younger families, which altered our overall audience demographic to be more in alignment with the community."

Immigration (46). Across nearly all comments on immigration, one theme was rampant: presenters' concern over immigrants' fears for their own safety. Presenters feel tension and concern, prompted by changes in national politics and immigration policies, which leave immigrants feeling unsafe. The breakdown of the commenters by community type appears below, illustrating that the 46 comments came disproportionately from presenters in urban environments.

Immigration Comments by Community Type

Rural ■ | Urban ■ | Suburban ■ | Other ■

All Respondents (393) | **Gentrification Comments (46)**

There was a striking resemblance across comments, as illustrated by these examples:

- From a college in Illinois: "We have a large immigrant/first-generation population and they have felt more unsafe in the past three years."
- From a suburban presenter in Long Island, New York: "Immigrant population has increased somewhat and experienced increased tensions."
- From an independent in San Jose, California: "Immigrant families are negatively impacted by national politics and anti-immigrant sentiment."
- From an independent in Texas: 'We are located in a heavily Hispanic area so I can only imagine they feel less safe."
- From a college in New Mexico: "We have a lot of Mexican immigrants. Yes, they are nervous and tend to keep to their own safe pockets of community."
- From a San Francisco independent: "Immigrants are being demonized and living in fear."
- From a presenter from La Jolla, California: "The impacts … and politics of immigration are felt deeply here as we live in a border town."

Just a few respondents described how these fears play out for their local residents. An independent presenter in a Tennessee city shared, in detail, how immigration fears prompted a huge drop in participation by their Latinx students whose parents are afraid to drive without a license, which they are unable to get if they are undocumented, leaving them "afraid of getting pulled over and deported, and increasingly afraid of ICE raids. They feel safe in our spaces once they arrive, but they do not feel safe traveling throughout our city."

A small handful of presenters expressed the attributes of immigrant cultures in their communities. A California independent presenter celebrates that "due to being a border city, we have a wonderful community of immigrant families." An independent from North Carolina presents "a single festival in a very diverse community that is working very hard to attractive refugee and immigrant populations that settle here upon arrival in the U.S." A Utah college prides itself on being a "safe refugee city" that offers "programming which has opened our events to a wider, more diverse, audience."

To learn how SAMPs are responding to these challenges, see Section F.

C. Structure: Staffing and Budgets

Since little data exist on how SAMPs are staffed, this study looked in some detail at staff size, structure, and changes in staffing over the past few years. Learning about staff structure should aid in understanding these organizations' capacity, challenges, and needs. Then, a more nuanced view reveals the multiple roles played by their staff. Finally, the SAMPs themselves offered their opinions and stories about how they carry out their jobs, revealing some of their biggest challenges.

Staff Structures. Respondents were asked to provide their number of staff, delineating between full-time, part-time, and contractors, and including tech, consultants, and seasonal support. If they worked for large organizations, such as colleges or government, respondents were asked to provide only the number of staff within their presenting departments. If unsure of exact numbers, they could provide estimates. The bar graph below illustrates respondents' staffing structures. Each column indicates one response for all 410 respondents. The grey indicates blanks, or respondents who did not answer that part of the question.

Number of Staff (n=410)

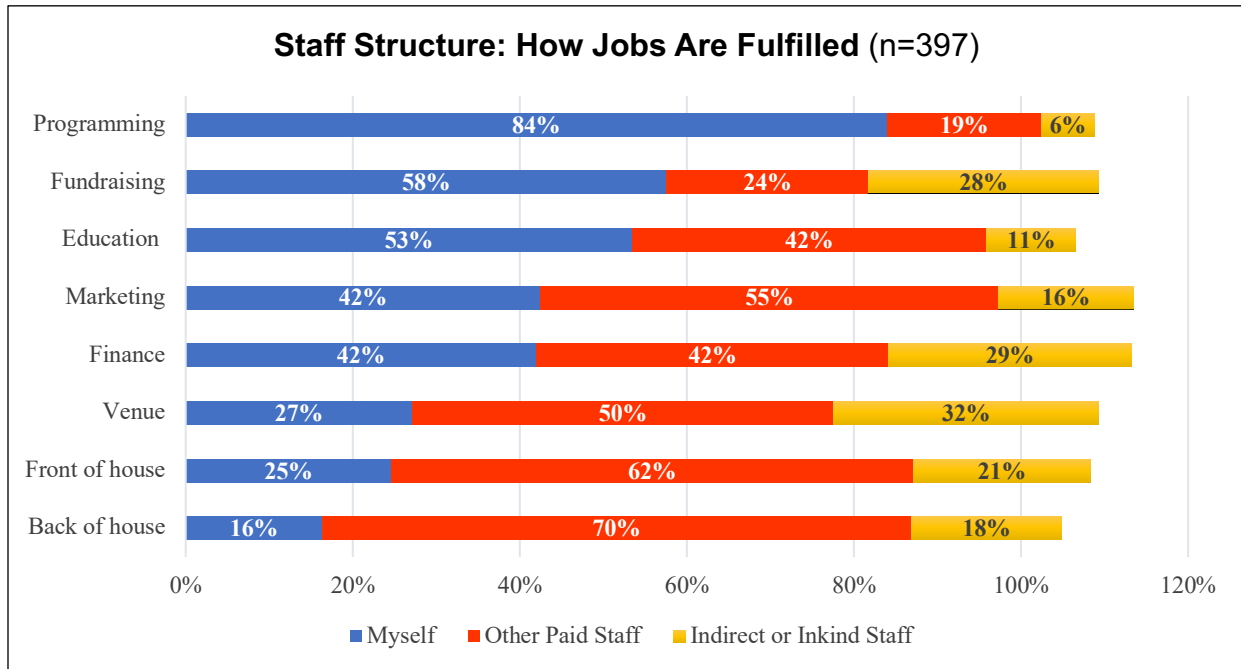|	Full-time Staff (390)	Part-time Staff (388)	Contractors (371)
Blanks	5%	5%	10%
Over 50	0%	3%	3%
21-50	5%	6%	5%
11-20	40%	10%	8%
4-10		20%	25%
2-3	26%	26%	29%
1	14%	16%	10%
0 (No Paid Staff)	10%	12%	11%
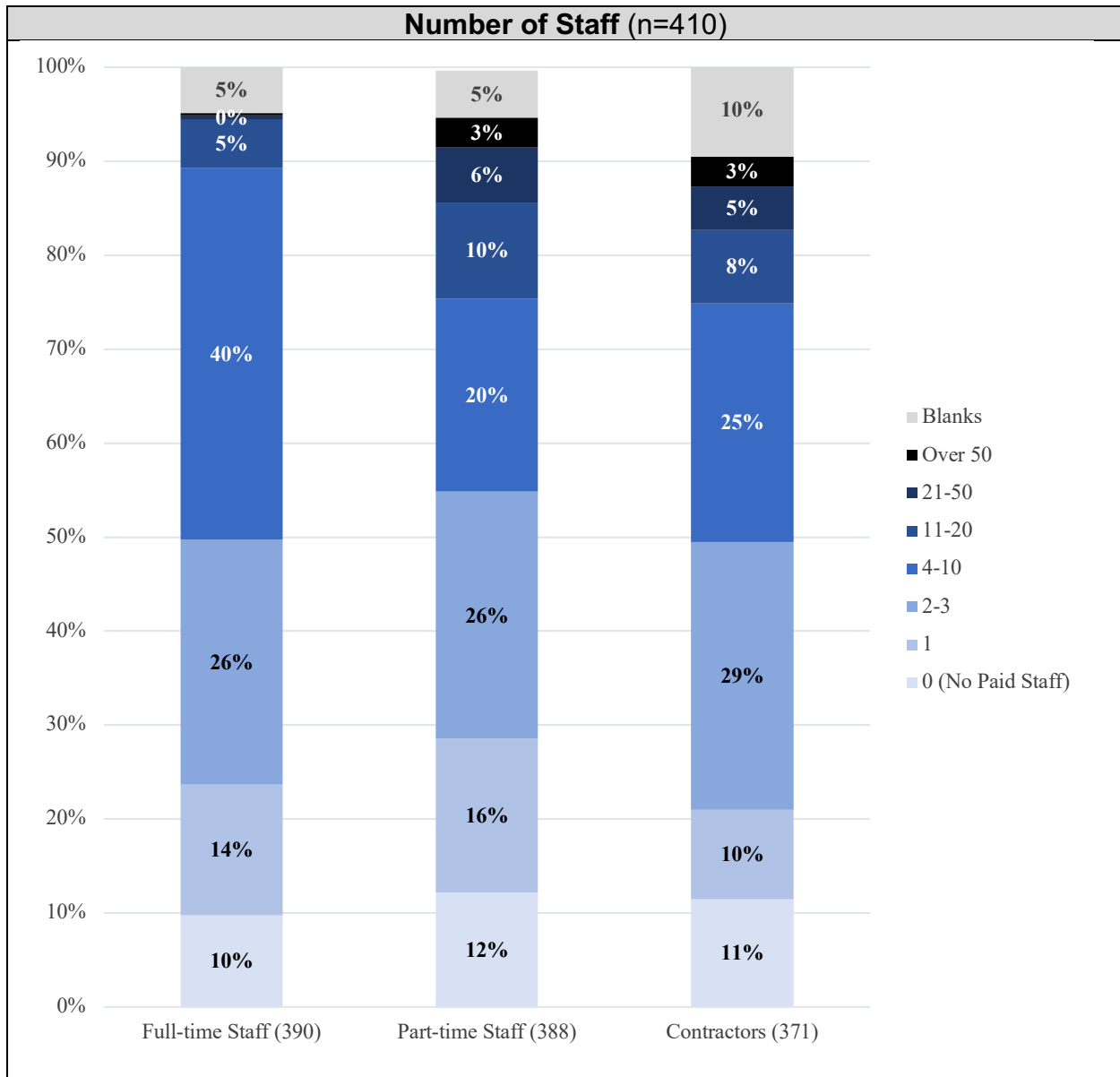
As the left column shows, **the majority—90%—have some full-time salaried staff but exactly half have no more than three of them.** Conversely, **10% have no full-time salaried staff.** Part-time staff are more evenly distributed. No conclusions can be drawn about contractors, without further research as to their roles. Seventeen have only contractors and no salaried staff.

The Number of Roles Fulfilled by One Person. Respondents were then asked to describe their staff structure. For each of the eight management areas below, they were asked whether they fulfilled the role, had staff who fulfilled the role, and/or if they utilized indirect, in-kind staffing for that role.
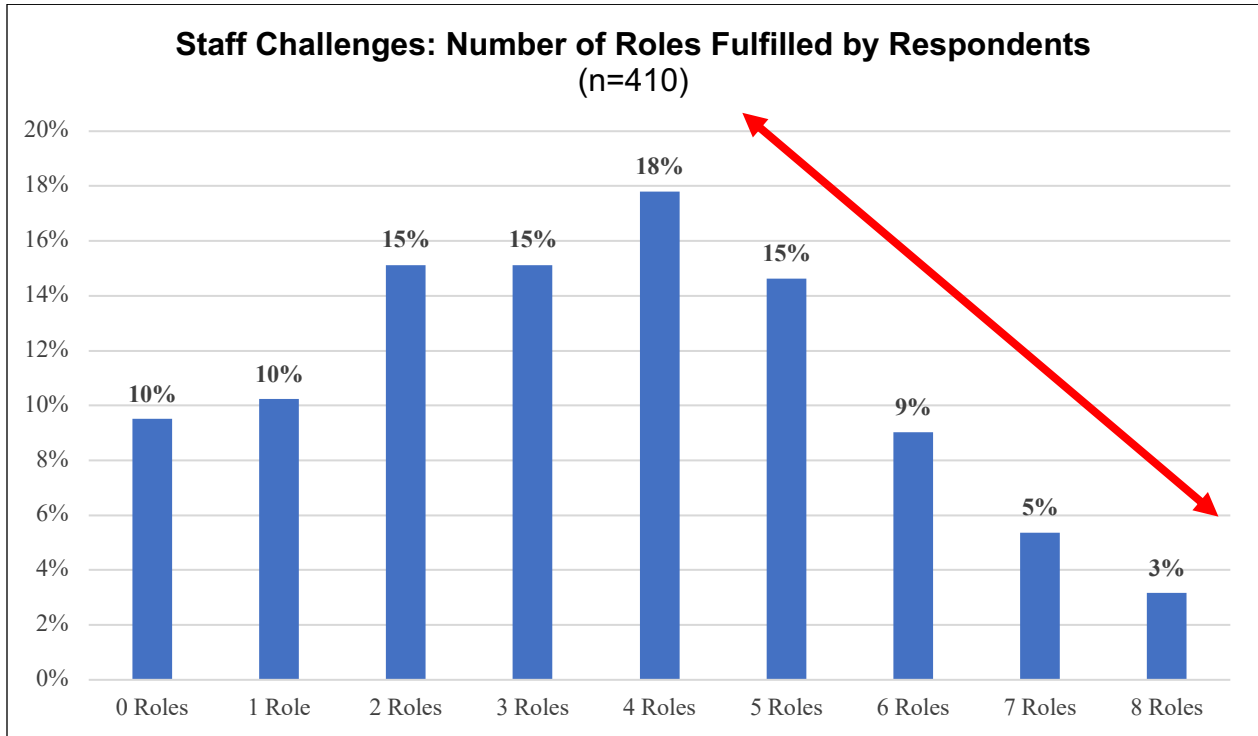
- Programming, including curating
- Fundraising
- Education/Community Engagement
- Marketing

- Finance
- Venue management and maintenance
- Front of house
- Back of house

Because each of these functions might be fulfilled by more than one staff person (e.g., the respondent plus additional staff) respondents could check all options that applied to their circumstances. (Offering that option resulted in bars below, which add up to more than 100%.) The blue portions of each bar illustrate functions played by the respondents.

Staff Structure: How Jobs Are Fulfilled (n=397)

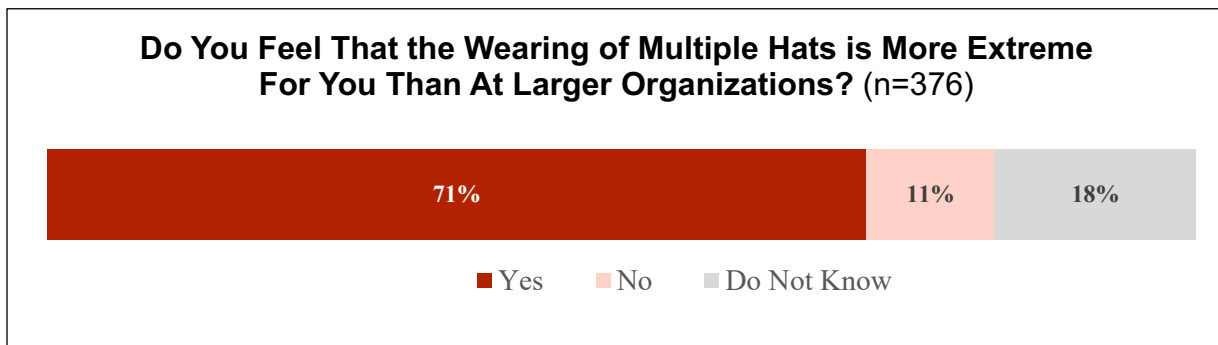|	Myself	Other Paid Staff	Indirect or Inkind Staff
Programming	84%	19%	6%
Fundraising	58%	24%	28%
Education	53%	42%	11%
Marketing	42%	55%	16%
Finance	42%	42%	29%
Venue	27%	50%	32%
Front of house	25%	62%	21%
Back of house	16%	70%	18%

The vast majority of respondents—84%—work in programming. More than half of them work in fundraising and education, and nearly half work in marketing and finance. A lower proportion—around a quarter—work in front and back of house and other venue operations. They are most likely to have other paid staff in venue operations, front and back of house and marketing.

The bar graph below examines more closely the multiple roles played by respondents. It shows the percentage of respondents who individually fulfilled the eight roles above. This analysis reveals an important finding: **as indicated by adding the percentages under the red arrow, exactly half, or 50% of respondents play four or more roles with their organizations.** Clearly the SAMP respondents wear many "hats" within their organizations.

Staff Challenges: Number of Roles Fulfilled by Respondents
(n=410)

Role	Percentage
0 Roles	10%
1 Role	10%
2 Roles	15%
3 Roles	15%
4 Roles	18%
5 Roles	15%
6 Roles	9%
7 Roles	5%
8 Roles	3%

Wearing Multiple Hats. In 2018 APAP conducted focus groups, or group interviews, with leaders of SAMPs. Interviewees stressed that they wear multiple hats within their organizations. Assuming that most arts administrators play multiple roles within their jobs, survey respondents were asked if they felt the wearing of multiple hats was more extreme for them than for large presenters. Those who responded yes were asked to describe what is different, or more extreme, about their circumstances.

Do You Feel That the Wearing of Multiple Hats is More Extreme For You Than At Larger Organizations? (n=376)

Yes	No	Do Not Know
71%	11%	18%

■ Yes ■ No ■ Do Not Know

All 268 (71%) who answered yes provided comments, which were much longer and more emotional than any other part of the survey. Comments and perceptions align within a few large yet overlapping themes.

From their writing, about one-quarter seem to carry the weight of the world on their shoulders from fulfilling so many roles within their organizations. They provided lists—or for some litanies—of all the job titles that they maintain, or tasks that they complete. A few comments illustrate the overwhelming responsibility that respondents inventoried and suggest the feelings they harbor about it all. Several expressed this phenomenon in a few words, as this rural independent presenter in Pennsylvania, who said, "I bring in the artists and take out the trash. 'Nuff said." Another independent presenter in a Maryland suburb exclaimed, "I don't wear many hats—I wear ALL the hats. There is no aspect of the operation that I can delegate completely." A suburban government presenter in Nevada reeled off the titles: "I am the Executive Director, Marketing Director, Development Director, Front of House, Back of House, Education Coordinator, Hospitality Coordinator, in addition to running public art programs and festivals." A rural independent presenter with no full-time staff tells a story of the relentless responsibility and exhaustion of all the tasks and responsibilities, as well as the reasons for staying in the job:

> I work 60-80 hours, day in and day out. I essentially do everything but focus lights and run sound for complicated shows. I pay the bills, find volunteers for tasks, send thank yous, negotiate and sign contracts, write and send press releases, market, figure out Google and Facebook advertising, iron the platform skirting for the stage, oversee the facility calendar, wash the coffee pot, go to the bank, update the computers …. I'm the first one at the theatre for a show and I turn off the lights and lock the door when it's over. I do what I do for a half-time salary knowing that what I do makes a difference. I'm passionate about our organization and will do almost anything to make it succeed. I'm not sure there will be anyone to step up when I need to retire.

This job overload can play out differently for institutions, where respondents described their relationships to—and sometimes tensions with—the larger entity. They describe the dual roles they play to both present and realize a mission that is unrelated to their presenting work. A local arts agency wrote of having "many other responsibilities besides presenting." A college presenter in rural Texas wrote: "I am a full professor [and teach] 5-6 courses a semester, program and negotiate contracts, supervise the box office and the facilities, and [serve as] technical director for the building and all events that take place in it.'" Another in Utah with a dual appointment as an ED and as assistant dean finds that "academic colleagues do not understand the workload of running an organization in addition to my work as part of university leadership." A suburban college presenter describes the relentless pace that comes from dual academic and presenting functions: "I manage the presenting side and the academic side in a building that is open from 7 a.m. until 11 p.m. 340 nights a year. The building never sleeps and even if you are away, it is generating work for you."

About 25 explained, in a more granular way, the patchwork of roles and dual functions that they, and others affiliated with their organization, play. About a dozen wrote of maintaining **the same trio of roles:** artistic, managerial, and fundraising or promotion. One wrote: "I function as Executive Director, Artistic Director and Development Director at the moment." Some mentioned a scenario that seemed common to many: **single-person departments.** As one in rural Georgia said, "I do not have a team to delegate to or bounce ideas off of." For others, managing multiple roles meant **managing the organization on a volunteer basis or dividing responsibilities with volunteer members.** A handful are volunteer-run almost entirely and others divide responsibilities, such as a rural presenter with "two board members filling two positions each." Others feel the **overlapping responsibilities of venues that are used for multiple uses,** such as this one in rural New York: "We present many performances plus rent our hall for weddings and special events. Our small staff sometimes has to work multiple 12- to 14-hour days to accomplish our mission and get all the work done that is necessary to have successful events."

For organizations that have more than one staff member, wearing multiple hats informs the ways in which **staff, who lack designated responsibilities, interact with and depend on each other and are expected to exhibit camaraderie.** At a suburban independent in Illinois states, "Everyone has to pitch in and do it all." Another in urban Missouri wrote, "Everyone is covering everything. [There is] no true designation." For some, **the unstaffed yet constant need to fundraise looms over all positions.** An urban presenter in Massachusetts reflects that "while not necessarily a bad thing," staff's lack of consistent or deep capacity in fundraising or PR means that all positions share the load: "So we tend to avoid the institutionalized compartmentalizing of the bigger presenters, but we lack capacity to do as much as needed" in order to grow. Sometimes fundraising challenges loom more prevalently, as for a rural independent that is currently undergoing a $5 million capital campaign on top of normal operations.

Often the responsibilities detailed above come with no training or experience. For some, it meant that current staff, when promoted, had to fulfill the responsibility of both their new and previous jobs. One in the Midwest with only a year of on-the-job training in marketing was appointed as interim marketing director and declared, "The inability for a nonprofit arts organization to have sufficient support for interims and quality onboarding of a position is truly problematic. It creates a massive pressure on current staff to fill a role that was never intended for them." As an urban college in California observes, "We manage generalists who, if they have staff below them, also manage generalists. We have to be well-versed in many areas and cannot just be leaders but must also be knowledgeable managers if we are going to be successful." Small staffs, and multiple hats, mean that staff are probably not being trained for their jobs; as one said, "There is no senior staff to shadow or mentor or learn from." As an independent urban Florida presenter declared: "We are expected to be experts in every field. Marketing people expect us to have the resources and time to spend on marketing when in truth, we can only spend a fraction of the time on marketing. Same goes with fundraising, accounting, grant writing, extra events, and educational outreach."

Having to fulfill so many roles inhibits staff from taking time off and discourages people from applying for arts presenting jobs. In urban settings, where job candidates can choose from numerous arts-related positions, hiring is hard for SAMPs, which in turn burdens their leaders with even more responsibilities. Just a few mentioned their struggles to secure job candidates skilled in technology or social media or manage a constantly changing pool of seasonal workers for festivals. The effects, predictably, are staff burnout and turnover, leaving SAMPs, at any given moment, understaffed. Around 10 shared a broader view of constantly having to divide their attention between setting larger vision and strategies, versus implementing those strategies, questioning where they should focus their energy. As one from rural Michigan explained, "We not only have to set the strategic direction of the organization and each 'department' (lucky if each function has its own staff member, let alone department), we also are frequently the boots-on-the-ground people helping the details move forward."

More than 40 respondents compared their own circumstances to larger organizations, saying that they could not imagine those jobs there were as hard. A college in an urban setting in Georgia surmised that larger presenters "aren't faced with having to do the laundry after receptions" or "take dishes home to wash," in addition to "being one-person HR, fundraising, safety officer, leader, marketer, purchasing agent, etc." Another in rural Wisconsin simply declared, "In a small organization I literally scrub the toilets. I was never stretched that far as a larger presenter." A presenter at a suburban college in Iowa, who was previously employed by a large presenter, recalled "separate teams for marketing, programming, and event management. Understanding that there is a difference in volume, all of those areas are handled by one person in my organization." A college presenter in suburban North Carolina compares their perceptions of responsibilities at a large organization to their own experience now:

> When the lead job opened at a flagship institution, I researched to prepare an application. They have nine people in positions that do the work that I do. What the hell does the executive director do if not ... everything? Do they just get to have "high thoughts" all week? Work a 40-hour week? Sign me up ... maybe?

Some of the colleges seem to present a special set of circumstances. **For around 20 colleges, particular tensions seemed to loom over maintaining their dual roles in academia and presenting, as they lack the ability to control their external, or hierarchical circumstances.** One college presenter in urban New York, who has two full-time staff and runs a year-round arts center with three venues, describes the futility of trying to secure resources: "Even if we raise the money, the college covers staff salaries," and prohibits them from hiring staff during its six-year hiring freeze: "comparably sized venues have at least five more staff members." Another speaks more directly about the resentment. Though they are "an arts organization with a community focus," the college does not prioritize staffing: "They allocate resources to student-centric areas, so we have been denied new staff positions every time we ask." Another seems particularly exasperated: "No technical or production personnel on campus nor venue managers AT ALL! I have been trying to tell the college it is needed, not just for us but for all performances on

campus, but they will not hire a production manager!" Yet another rural college in an Eastern state bluntly shares the repercussions of trying to solve the problem:

> We answer to the greater university but receive little help or cooperation, especially in terms of budgets and fundraising. We are expected to succeed but are not helped or even encouraged to do so—and severely scrutinized or punished if we fail to meet (often invisible) goals or budget quotas.

For others, the reliance on a constantly rotating student staff means constant transition and onboarding time. One in rural Pennsylvania exclaimed: "I am the one-stop shop who runs the entire program and venue myself, [with] a graduate student, and a handful of student work studies and volunteers." Another feels the lack thusly: "Curating and fundraising are in my scope of responsibilities but having no help/support for education/outreach and marketing is very challenging at times." Yet another, who directs a performing arts center, not only does all marketing, booking and front-of-house, but is "required to serve as faculty and teach college courses, serve as a volunteer in the community as a representative of my organization, am responsible for development and donor relationships, and am expected to assist with other events throughout the campus."

Additional Comments.[5] Around 40 respondents made general comments about wearing many hats, with a few venting about how hard they worked, with three stating the number of hours they worked (interestingly all reported 70 per week). Around five accepted the circumstances of maintaining so many roles, either feeling it was to be expected or not a problem or even a positive thing. One who had worked for a "college presenting organization blessed with many specialists" found that "my current organization is a group of motivated 'jacks-of-all-trades' although job duties are fairly well defined. We just all wear multiple hats."

Staff Size. Respondents were asked about their staff capacity, specifically if they felt chronically understaffed, understaffed right now or staffed about the right level.

Regarding your staff size, do you feel you are: (n=375)

34%	41%	24%
■ Chronically understaffed	■ Understaffed right now	■ Staffed at about the right level
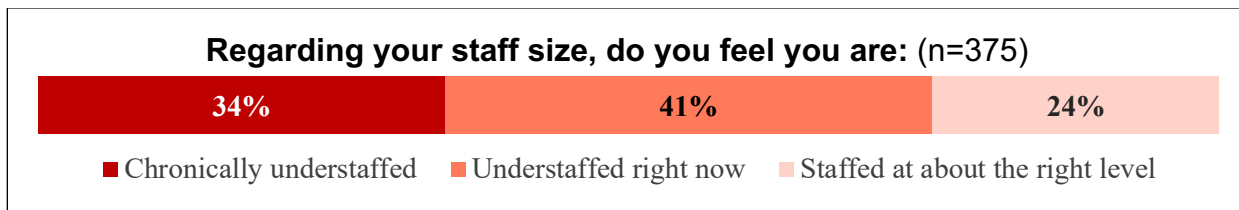
Three quarters of respondents are understaffed either now or perpetually. One-third felt chronically understaffed and 41% are understaffed now.

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[5] Based on an analysis of all comments and the prevalence and intensity of the responses to this question, the author offers two observations. 1) Subjectively, the level of pressure or exhaustion felt most overwhelming for rural presenters with small staffs. 2) Some respondents may think the wearing of so many hats it is rarer than it is; they may think they are the exception rather than realizing that they are the norm.

Staffing Changes. Respondents were asked about staffing changes over the past three years—specifically whether their salaried and/or contracted staff had increased, decreased or stayed the same. A total of 401 answered one or both portions of the question (e.g., only nine left it entirely blank, and 36 answered the salaried staff portion but not the contractor portion and 34 answered the contractor portion but not the staff portion). As shown in the two graphs below, **the majority—three quarters—of respondents maintained (52%) or grew (36%) their salaried staff,** including part- and full-time employees. Few (13%) saw decreases.

- **To an even greater degree, nearly all—94%—of respondents maintained (63%) or grew (31) their contractors.**
- **Staff grew slightly more than contractors.** The dark gold bar shows that 31% of respondents experienced increases in contractors, whereas 36% (as shown in the dark blue bar) saw increases in salaried staff.

Salaried Staff Changes in the Past Three Years (n=367)

Decreased	13%
Same	52%
Grew	36%

0% 10% 20% 30% 40% 50% 60% 70%

Contractor Changes in the Past Three Years (n=365)

Decreased	6%
Same	63%
Grew	31%

0% 10% 20% 30% 40% 50% 60% 70%
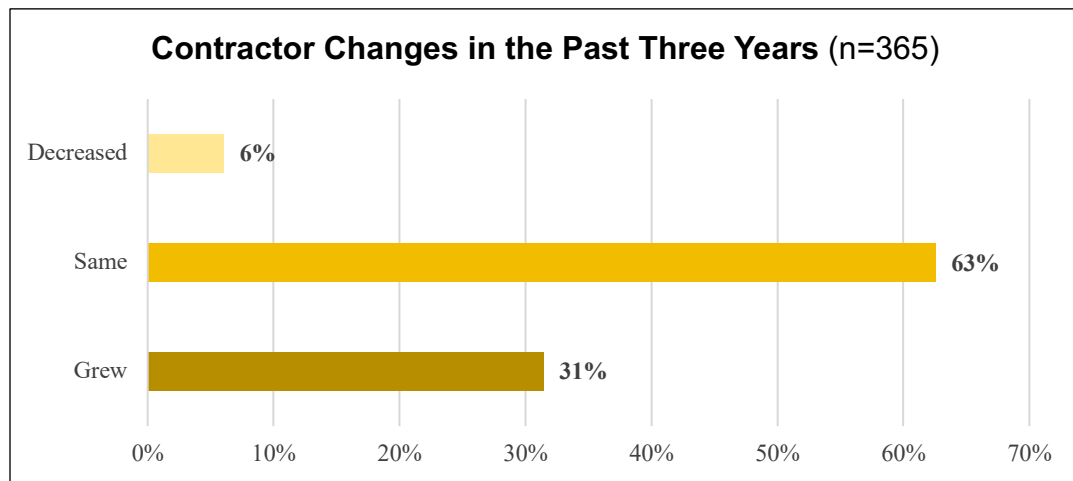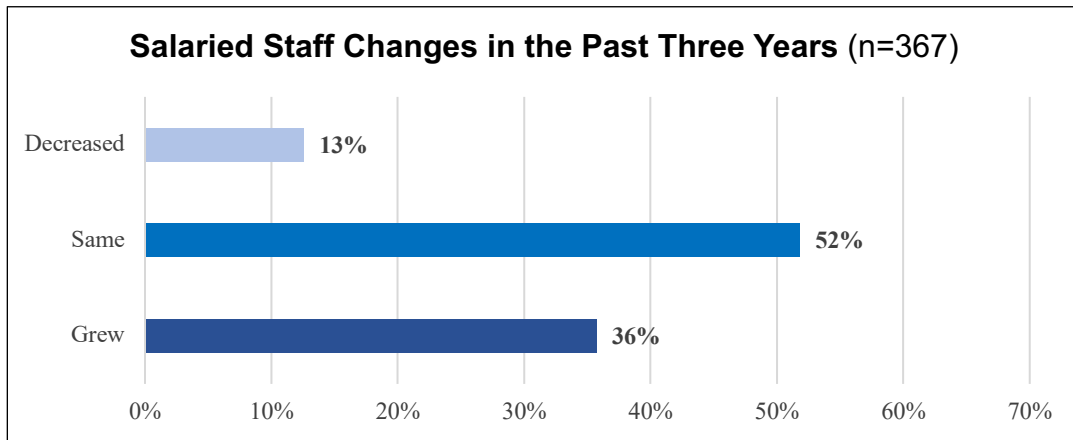
Given the finding in the prior section that three quarters of SAMPs are understaffed now or chronically, it was expected that data from this question would have shown a higher number of decreases in salaried or contracted staff. The *degree* of change of contractors or staff remains unknown. It is surmised that SAMPS may be so understaffed that a slight increase may still leave them woefully understaffed.

Further analysis was conducted to better understand if there were true increases or decreases in staffing. Below, each gold bar illustrates a comparison of contracted staff to salaried staff. The color saturation of gold indicates whether contractors decreased, stayed the same or grew.

- **38% saw no change in either contractors or salaried workers,** as indicated by the large gold bar in the center. Very few (3%) saw decreases in both categories of staff.
- **17% saw growth in both salaried and contracted staff,** as indicated by the dark gold bar on the bottom.
- **Only 3% saw decreases in both salaried and contracted staff.**

Staffing Changes in the Past Three Years:
A Comparison of Contracted to Salaried (n=331)

Contracted Decreased	Contracted Stayed Same	Contracted Grew

Salaried Decreased (n=42): 3% 7% 2%

Salaried Stayed Same (n=171): 1% 38% 12%

Salaried Grew (n=118): 2% 17% 17%

0%   10%   20%   30%   40%   50%   60%   70%
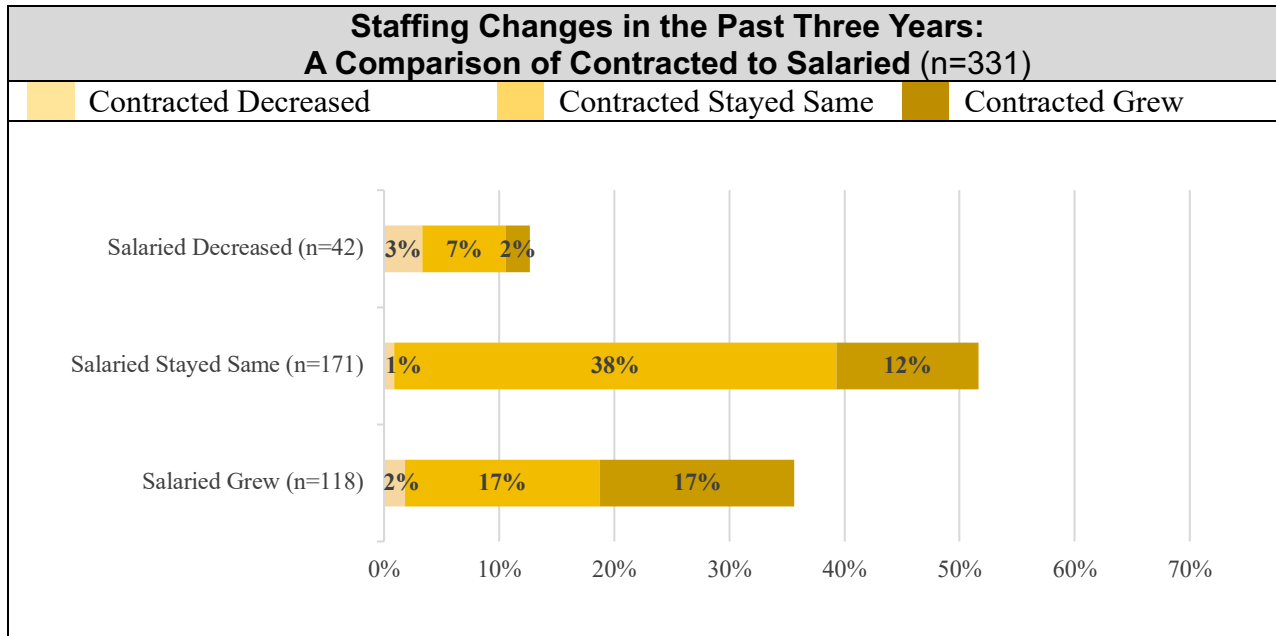
Organization Change. Respondents were asked to indicate over three years, the degree to which they have experienced change in the following areas of their organization:

- Staff leadership
- Board or other leadership
- Meeting financial goals
- Funding environment
- Ability to reach decisions and move forward with plans

The red bars below show the degree of change, with dark red indicating high change.

Organizational Change in Past Three Years (n=380)

Legend: ■ Changed Dramatically ■ Changed ■ Same ■ N/A ■ Blank

Categories (top to bottom): Staff leadership, Funding environment, Meeting financial goals, Board leadership, Reaching decisions, realizing plans
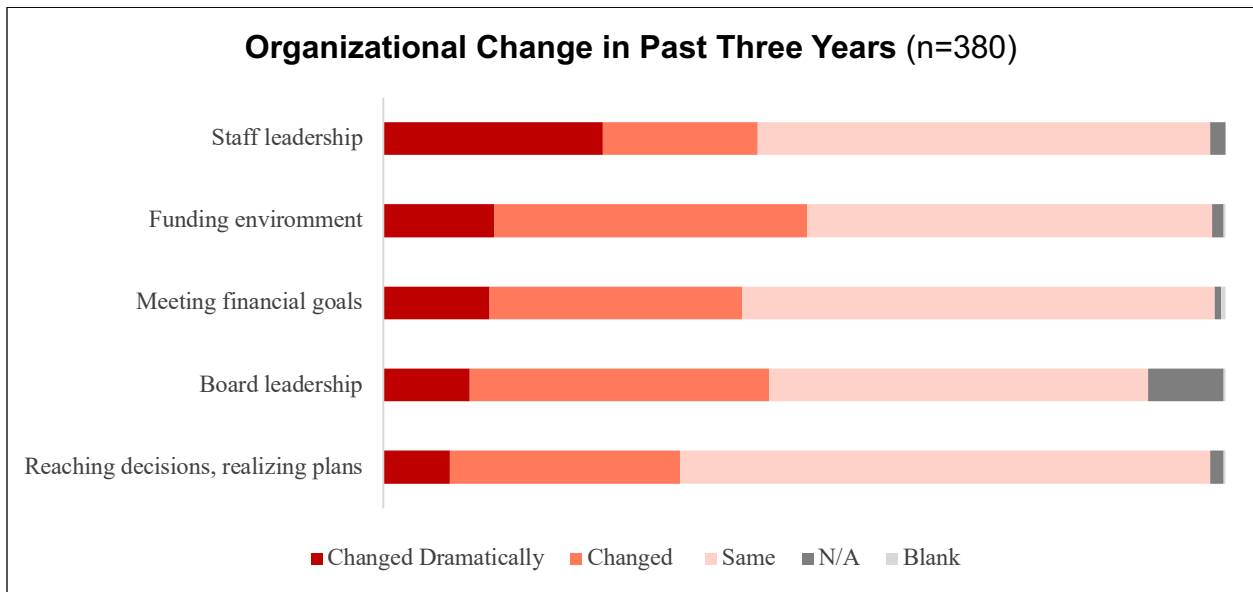
For each areas one-third to half of respondents had experienced some degree of change, whether dramatic or moderate. The highest overall area of change was the funding environment, experienced by half of respondents. However, a **relatively low percentage had experienced dramatic change in any of these areas.** The highest area of dramatic change was staff leadership, experienced by one-quarter of respondents. However, nearly all of those who responded to this question (317 or 380, or 83%) had experienced some change in at least one of the areas above. Respondents' experiences of change were consistent across organization types.

Board of Directors. Two-thirds of respondents (272) have their own board of directors.
Those who have boards were asked to provide the number of members and type of board. (The majority of those without boards are colleges and units of government.)

Number of Board Members (n=267)

3-5	6%	
6-10	28%	
11-15	38%	
16-20	17%	
21-25	7%	
26-40	3%	
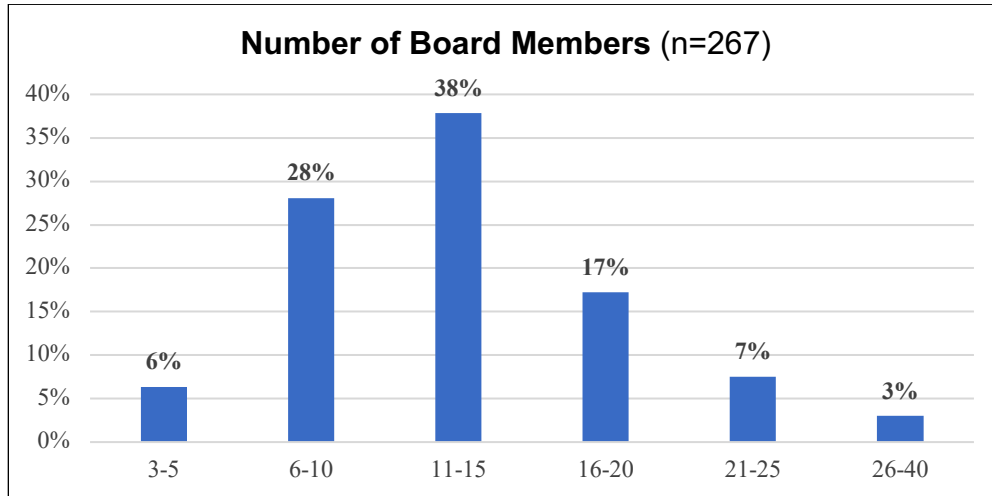
Of the 272 who have boards: **About one-third have 10 or fewer board members and over half have boards with 11-20 members**. Ten percent have higher-sized boards, above 20 members.

Respondents were then asked to describe their boards' functions by selecting of four types:
- Working board, meaning that it voluntarily provides help with day-to-day administration and/or programming
- Governance board, meaning it advises on policies gut does not do day-to-day work
- Both working and governance board
- Board in name only, that provides little or no governance work

Type of Board (n=272)

- Governance — 54%
- Both Working and Governance Board — 34%
- Working — 4%
- Board in Name Only — 9%
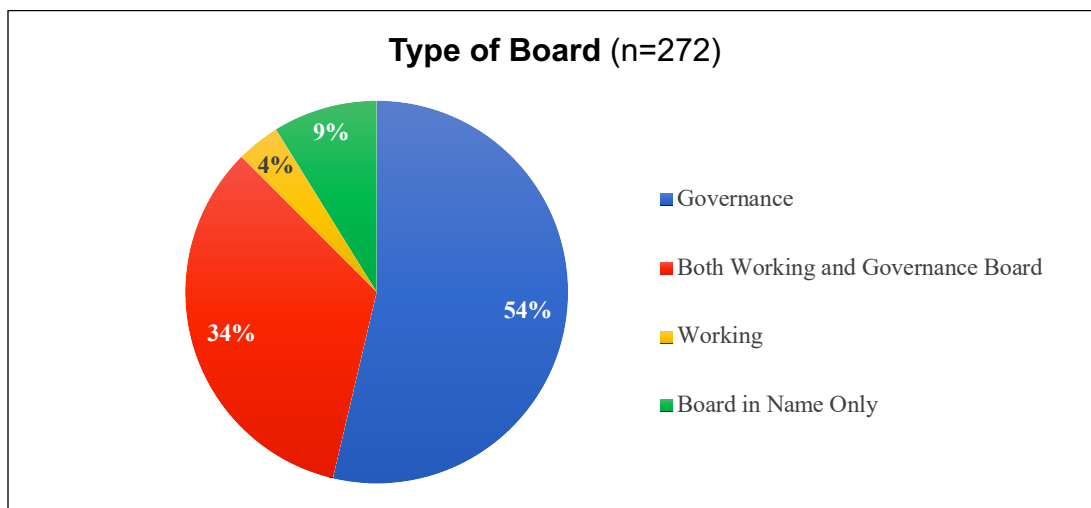
Over half of their boards provide governance only, another one-third are working and governance.

Funding and Budgets. Respondents were asked to share their perspectives about their funding and budgets by choosing from the statements below. They could check all that apply.

- I worry about meeting the budget.
- If we experience budget shortfalls, my budget is covered by a larger entity, such as the city or my college.
- I do not worry extensively about the budget, based on our past success at securing funds.
- Other. Respondents could describe their budget management if the above statements did not fit their circumstances.

Attitudes About Budget (n=376)

Category	Percentage
I worry about meeting the budget	55%
My budget is covered by a larger entity	28%
I do not worry about the budget	28%
Other	15%
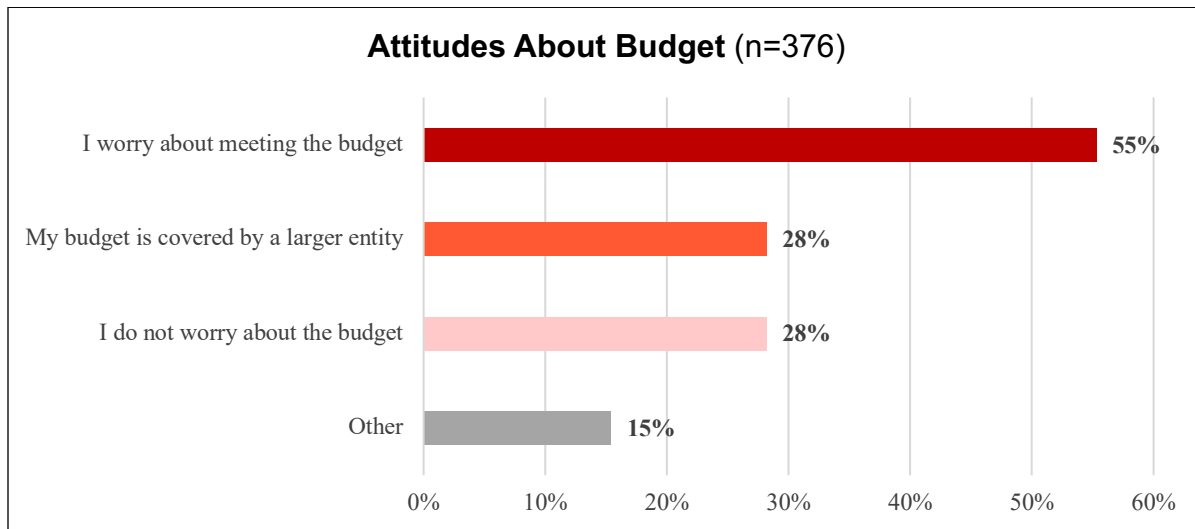
Three quarters (76%) selected a single answer and the remainder selected more than one answer. **More than half worry about meeting their budgets.** Even some of those whose budgets are covered by a larger entity also indicated that they were worried about meeting it.

Regardless of which statement(s) they chose, 58 respondents described other budget management circumstances. (Of the 58, 22 chose only this "other" statement; the remaining 36 comments were split between those who were, and were not, worried about meeting their budgets.) Ten explained why they generally did not worry about budgets or felt that worry was productive. One urban independent presenter said, "Worry is healthy. I don't agonize" or another who felt that "worry leads to care and consistency, as well as diverse strategies to secure… resources." Another stated, "Funds seem to appear." Sixteen described strategies that helped them meet their budgets, including endowments or cash reserves (7), building conservative budgets (3), subsidies from government (2), earned income, generous donors, planning ahead, having board help, having a track record of meeting the budget, or staying vigilant about managing the budget.

In contrast, others described a range of problems they face in meeting their budgets, including building renovations or, for one, a capital campaign that is "cannibalizing our budget." Other

budget concerns included: overreliance on grants (2-3); problems in cash flow from government payment software; meeting funders' expectations for grants; or founder and staff transition. Seven described being in a state of constant concern, regardless of whether they meet the budget, due to the unpredictability of support. Ten colleges wrote of feeling pressured in meeting budgets, stemming from demands that are placed on them by administrations that change their budgets every year; increase fundraising goals; or transfer surpluses to the college's coffers. Circumstances like fluctuations in earned income or having to face unannounced budget cuts are also beyond their control. One faced "a significant unannounced budget cut this year after all my programming was complete—the first time in 20 years … very difficult." Another explained, "Budgets are very tight. I worry we could be eliminated if we do not meet financial goals."

D. Programs, Events, and Venues

SAMP respondents shared the number of venues and events they offer, artistic disciplines presented, and how their seasons were structured. They then shared their opinions about offering free programming.

It should be noted that around 150 respondents, or 37%, left many of the questions in this section blank. It appears that questions that required specific numbers were less likely to be completed than those asking for commonly known information or opinions.

Venue Access and Types. Respondents were asked to indicate how they access venue(s), including whether they:

- Own venue(s)
- Rent venue(s)
- Operate venue(s) provided by college, city/county, or other government entity
- Utilize outdoor venues for festivals
- Operate without a venue
- Access venues in other ways, which they could describe

Each respondent could have up to six answers if they had five venues and also entered a comment under "Other." The graph below illustrates the total of 81
 ways that 268 respondents access venues. (Because respondents could list multiple ways in which they access their venues, the graph below shows number of ways, rather than the number of respondents or venues.)

Access to Venues (n=268)

Category	Percentage
Rent	46%
Own	40%
Venue Provided	34%
Outdoor Venue	25%
Other Venues	10%
No Venue	5%
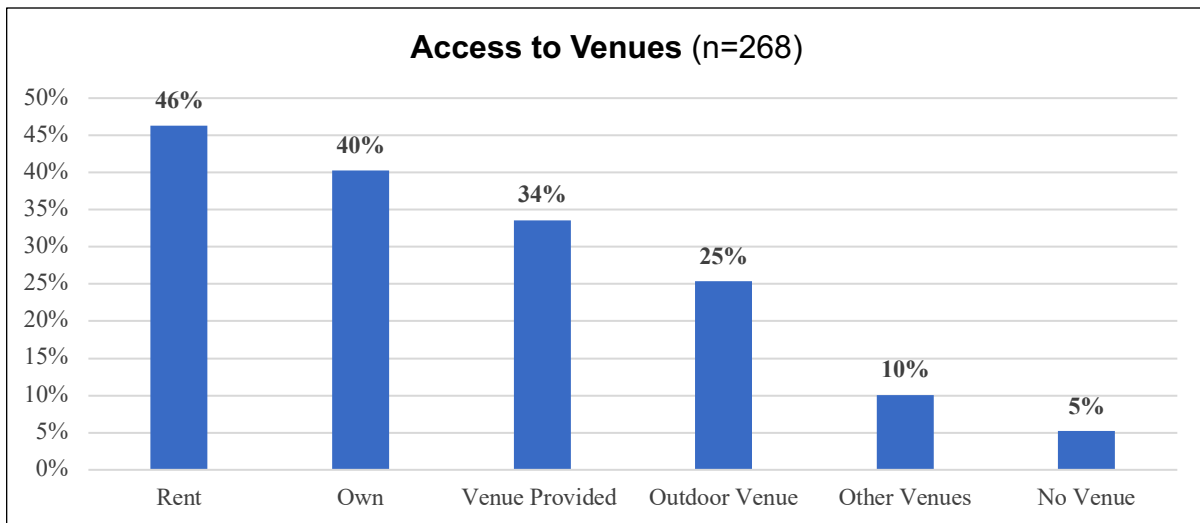
Nearly half rent their venues and 40% own venues. Interestingly, for the one-third (81) that have venues provided for them, most (58%) were independent, and nearly one-third (29%) were colleges (with or without their own 501(c)3). For the 16 respondents who chose "Other" and provided descriptions, several used K-12 facilities and high schools; several operated in public spaces such as libraries and churches; two will open facilities in the next year; one manages venues for a variety of purposes; and others simply described working in a wide range of venues. One described a daunting challenge of losing its venue to a hurricane and using four community spaces while the venue is repaired.

Venue Sizes. Respondents were asked to list the total capacity of their venue(s). Those with multiple venues could list the capacities for up to five of them.

The 265 respondents reported on a total of 583 venues. (Because respondents could list multiple venues, the graph below shows number of venues, rather than the number of respondents.) The smallest venue accommodates 25 people, reported by two respondents, and the largest venue has a capacity of more than 20,000, also reported by two respondents, both for outdoor festivals. The median venue size is 420 seats. The average venue size is skewed due to 12 large venues; when those 12 are removed, the average venue size is 688.

Venue Capacity: (n=265 Respondents, 583 Venues)

Under 100	100-250	251-400	401-800	801-1200	1201-3000	3,001-10,000	10,001-20,000	Over 20,000
36	141	101	141	77	61	20	4	2
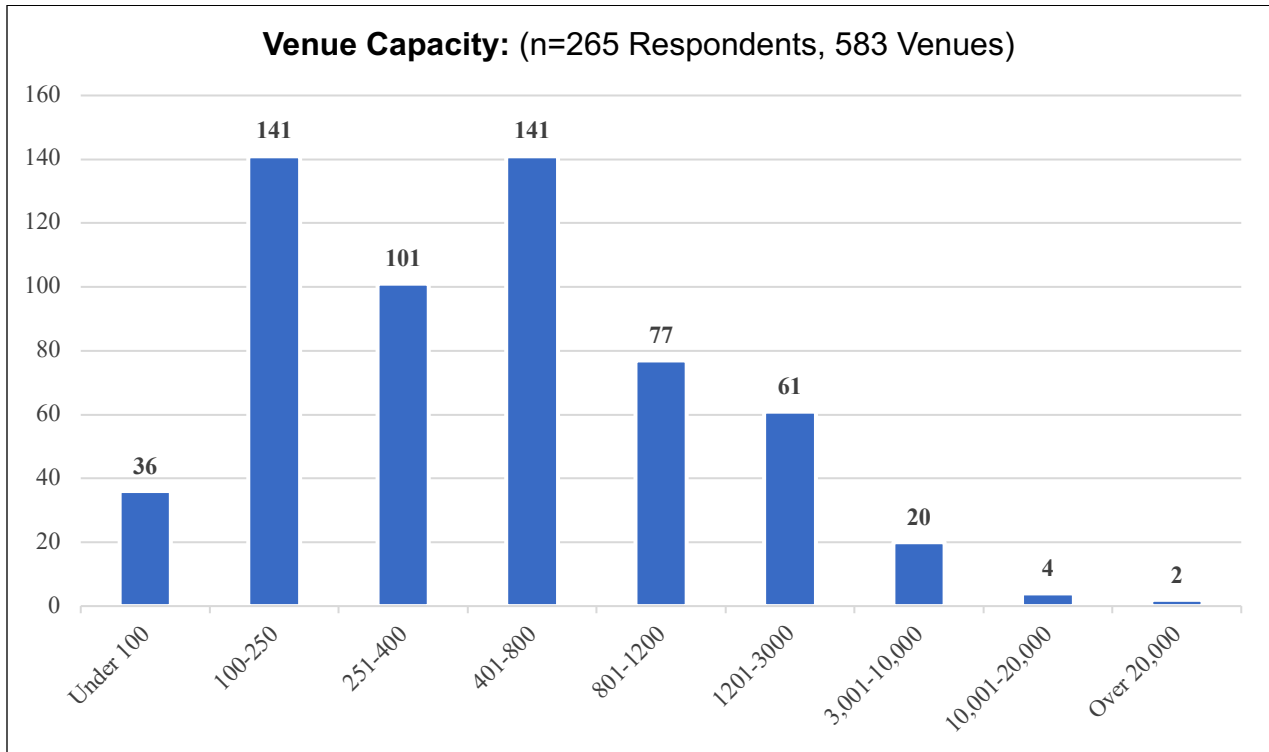
Of the 265 who answered, **three-quarters have venues with more than 400 seats and nearly half (121 or 46%) have venues with 800 or more seats**. *However due to the low response to the question, which one-third of all respondents did not answer, these results may not accurately represent the survey pool.*

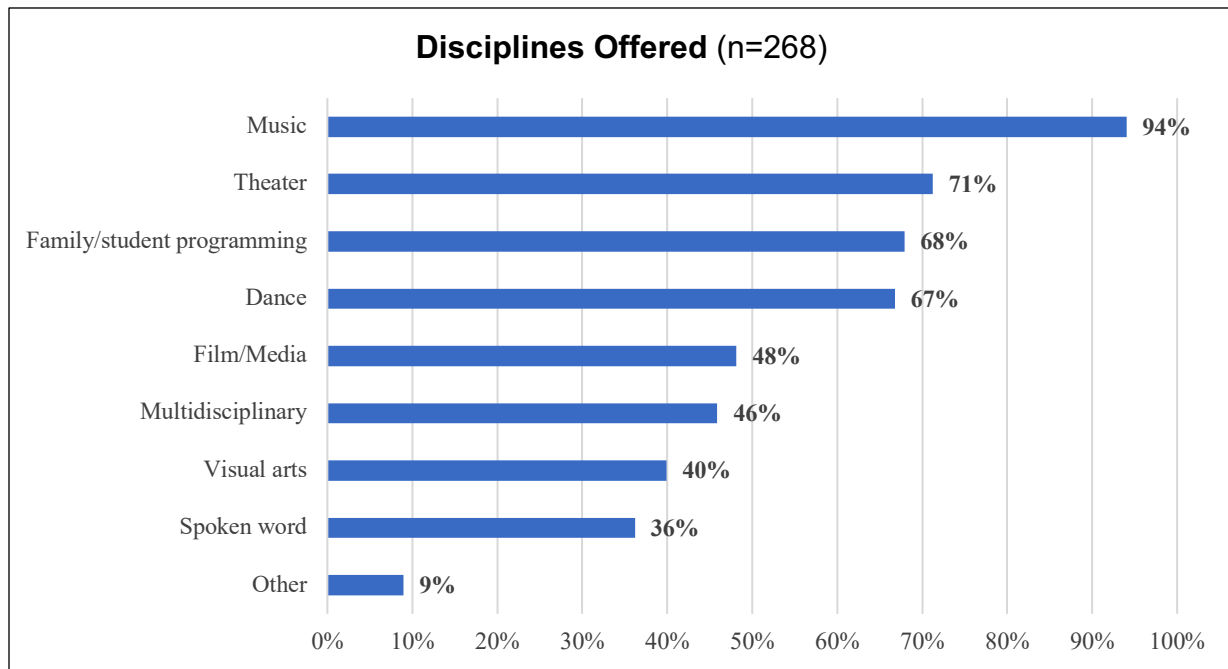**Typical Presenting Season.** Respondents shared their typical presenting seasons. Half program from fall to spring, with an additional 39% programming in the fall to spring and summer. A small number program in summer or in other ways.

Typical Presenting Season (n=266)

- Fall to Spring — 50%
- Both (Fall-Spring and Summer) — 39%
- Summer Series — 7%
- Neither — 4%
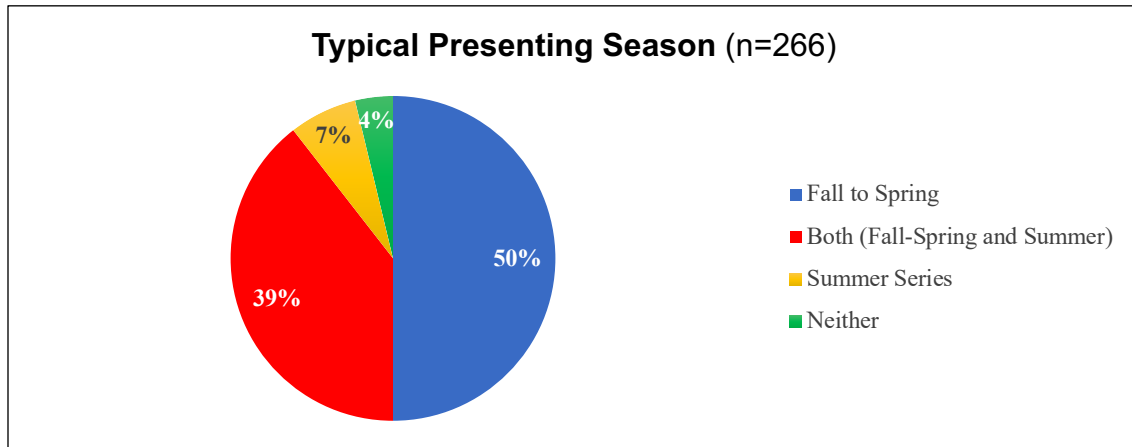
Disciplines Offered. Respondents were asked to indicate all disciplines they offered. Curiously, 39% (159) left this question blank.

Disciplines Offered (n=268)

Discipline	Percentage
Music	94%
Theater	71%
Family/student programming	68%
Dance	67%
Film/Media	48%
Multidisciplinary	46%
Visual arts	40%
Spoken word	36%
Other	9%

By far, music was the most common art form, presented by 94% of respondents. Following that, three disciplines are nearly tied: theater, family/student programming, and dance, each of which were presented by more than two-thirds of respondents. The remaining disciplines are presented by one-third to one-half of presenters. Among the other disciplines that respondents listed were comedy (5), circus (4), and puppetry (2) as well as public conversations and, as one said, "large-scale fountains set to music."
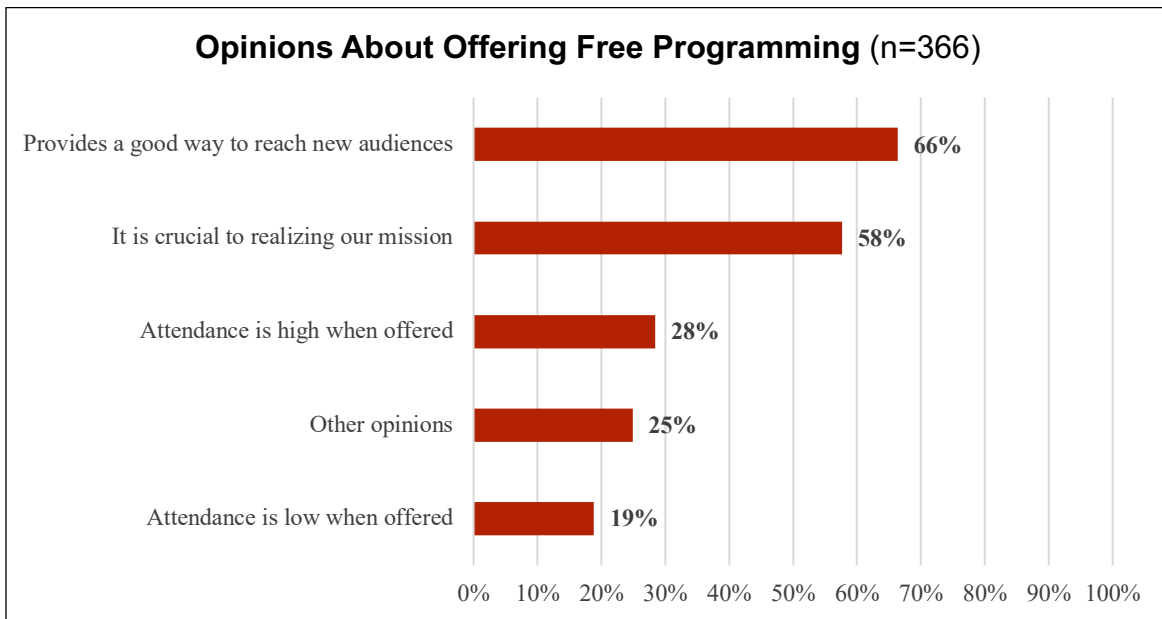
Events Offered Per Year. Respondents were asked for the approximate number of events they offered per year, counting each artist presented as a single event. The number of respondents was low, at 267.

- Two presenters offered all events for free (a festival and a concert series in the park). All others offered a mix of paid and free events.
- The presenter with the largest number of paid events offered 250.
- 96% offer some free events, with more than half offering 1 to 10 of them.

Events Per Year

Total Events (n=267)

0	1-10	11-20	21-30	31-50	51-100	101-200	Over 200
0%	19%	20%	15%	18%	16%	9%	3%

Average: 40 Median: 30

Paid Events (n=260)

0	1-10	11-20	21-30	31-50	51-100	101-200	Over 200
1%	33%	22%	14%	13%	10%	6%	1%

Average: 16 Median: 34

Free Events (n=238)

0	1-10	11-20	21-30	31-50	51-100	101-200	Over 200
6%	56%	17%	8%	7%	4%	1%	1%

Average: 18 Median: 6

Free Programming Opinions. Respondents were asked to share their attitudes about offering free programming by registering their opinions on the following statements. They could check all that applied.

- Free programming provides a good way to reach new audiences.
- Offering free programming is crucial to realizing our mission.
- Attendance is high when we offer free programs.
- Attendance is low when we offer free programs.
- Other. Respondents could write in any opinions that were not covered above.

Opinions About Offering Free Programming (n=366)

Category	Percentage
Provides a good way to reach new audiences	66%
It is crucial to realizing our mission	58%
Attendance is high when offered	28%
Other opinions	25%
Attendance is low when offered	19%

Respondents' opinions about offering free programming were fairly—but not overwhelmingly—positive. Two-thirds of respondents reported that offering free programming provides a good way to reach new audiences and just more than half of respondents see free programming as crucial to realizing their mission. However, these proportions imply that just under half of respondents may *not* value free programming. Therefore, the comments written by 91 respondents were particularly important in discerning their more nuanced opinions and **show a particularly wide range of views toward free programming.**

One-third of the commenters stressed that **offering free events was an important part of their mission to serve their broad communities.** This group included presenters of all types, in all kinds of communities. One independent offers a free youth program that is "core to our mission as is the NOTAFLOF policy ('No One Turned Away For Lack Of Funds')," which has spread to other producers and is "becoming part of our Island culture." For a rural college, free programming helps make connections and demonstrate relevancy between their organization, community, and artists, resulting in "some increased attendance at paid events."

Another rural, independent presenter works in a "very low-income county so cost to entry is a barrier." An urban independent presenter feels similarly, writing, "Our community has a high poverty level, so we have a need to reach all our constituents." Others described examples of programs for low income people or families.

Another one-third registered **strong opinions about the tradeoff in perceived value by audiences for events that are offered for free.** Most simply felt that free programs devalue the artist and "product," or as another said, "people see free as being cheap." One was more direct, feeling that audiences have "no 'skin in the game' they have not paid for the tickets. It is easier to sit at home and stream." Another looks to the longer-term value, or lack thereof, feeling it "negatively impacts our ability to sell tickets to ticketed programs." Yet another agrees, feeling that "'free' undermines the value of art and doesn't necessarily generate new paying patrons." Some believe in occasional free programming, but still experience disregard by audiences for paid events, who believe that they "should be free like the others despite the production value." In response to such concerns, five stressed offering reduced ticket prices rather than free events.

For another one-third, **attendance is a factor,** and has been either low, or mixed, depending on the event. A rural college finds that U.S. Army field bands are particularly well-received, whereas an independent urban presenter finds high attendance for events offered to an adjacent college, or for its free festival programming, but not for other free events it has offered. Some of these respondents also commented on the trade-off in value described above.
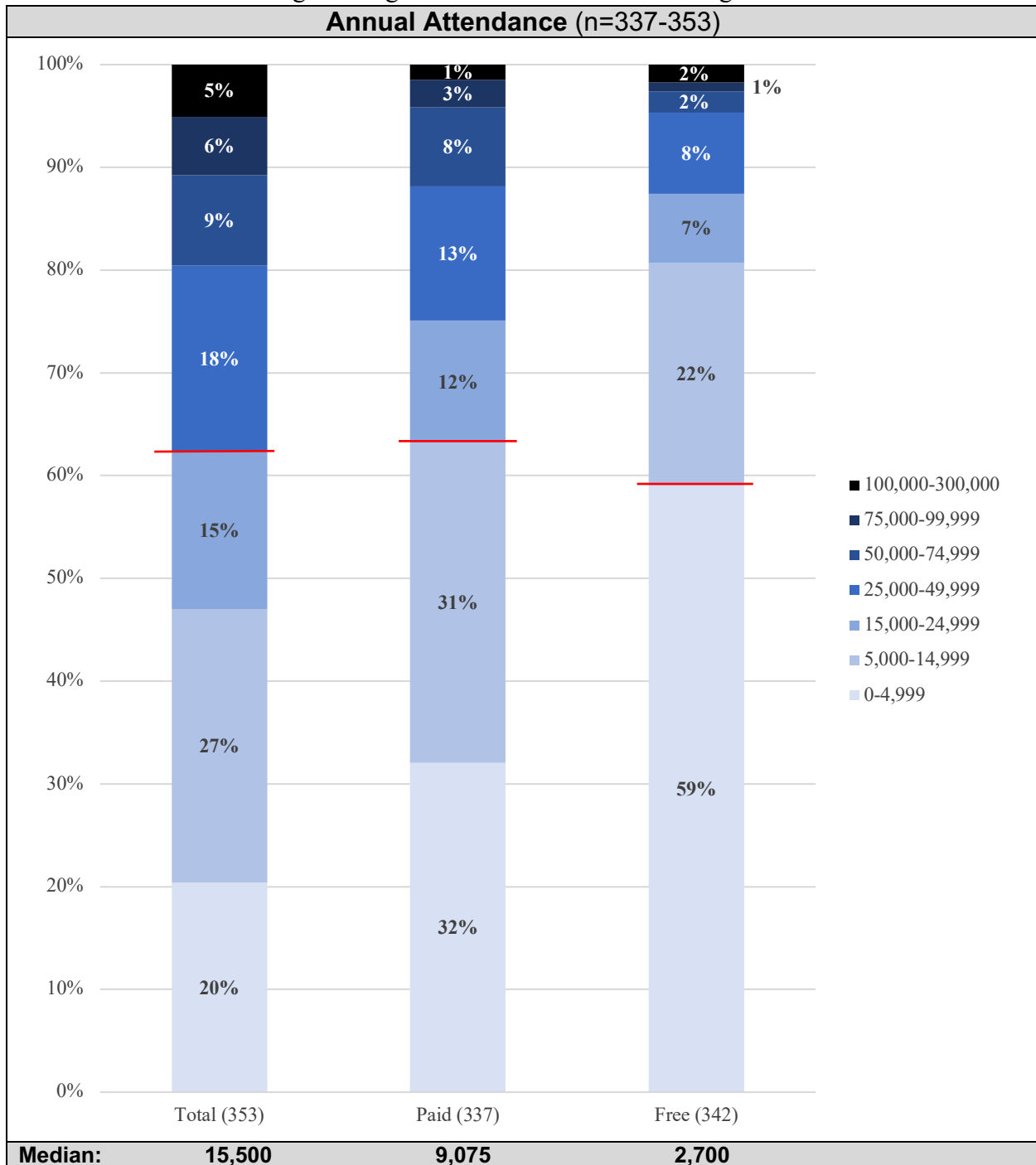
For eight respondents, the **cost of offering** free events is a major factor due to their limited funding, small houses, or capacity to market them. A few (6) either did not offer free programming or felt that their current experiences with free programs were too early to evaluate.

Finally, four more shared positive feelings about and impressions with offering free events.

E. Audiences and Attendance

This section looks at overall attendance as well as audience types and demographics, and respondents' mission statements, as they relate to audiences. SAMPs weigh in regarding the challenges they face in reaching younger audiences.

Annual Audience Size. Respondents were asked to estimate their annual audience size including total, paid and free attendance. If they rented a facility and were unsure of attendance, they were directed to exclude those figures. Figures were converted to the ranges below.
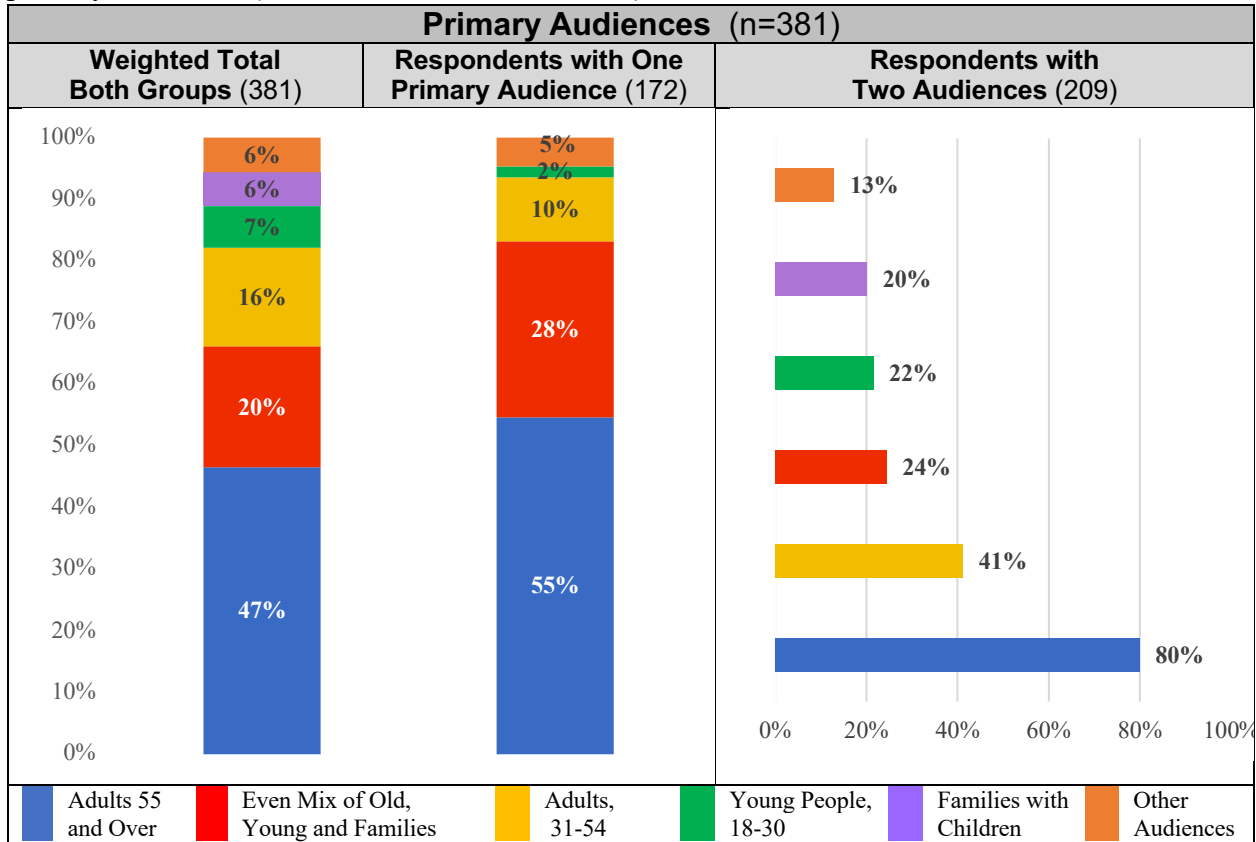
Annual Attendance (n=337-353)

Range	Total (353)	Paid (337)	Free (342)
100,000-300,000	5%	1%	2%
75,000-99,999	6%	3%	1%
50,000-74,999	9%	8%	2%
25,000-49,999	18%	13%	8%
15,000-24,999	15%	12%	7%
5,000-14,999	27%	31%	22%
0-4,999	20%	32%	59%

Median:	15,500	9,075	2,700

- **More than 60% of respondents draw fewer than 25,000 audience members per year**.
- **More than 60% have fewer than 15,000 paid audience members**.
- **Nearly 60% have fewer than 5,000 audience members who attend for free.** Ten present all events for free.

Primary Audiences. Respondents were asked to identify their primary audiences, selecting up to two of the following options:

- Primarily young, aged 18-30
- Primarily 31-54
- Primarily older, 55 or older
- Primarily families with young children
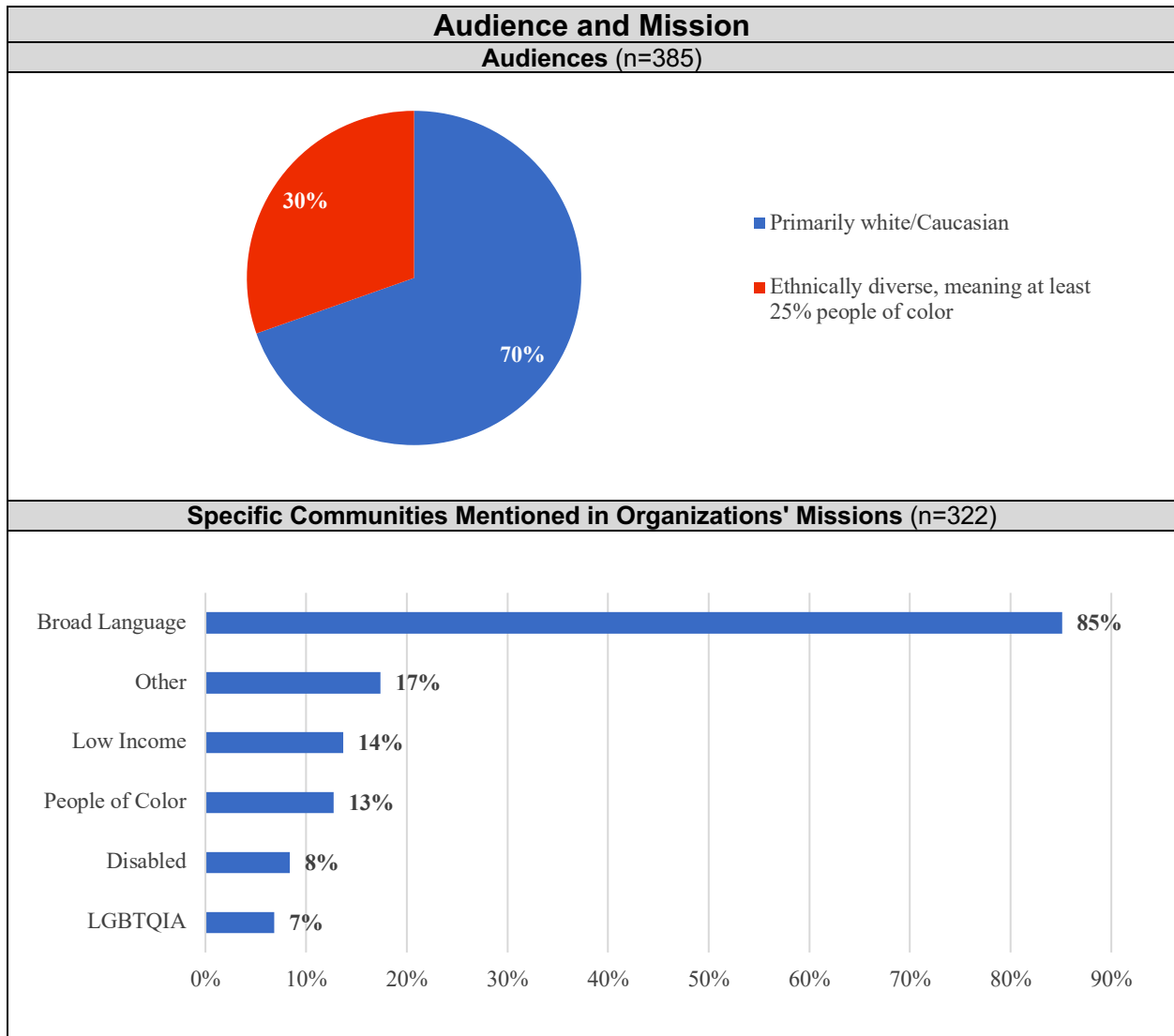- An even mix of old, young, and families
- Other

Of the 381 who answered the question, responses are presented in two groups: a) those who selected only one primary audience (172, shown in the first bar) and b) those who selected two primary audiences (209, shown in the second bar).

Primary Audiences (n=381)		
Weighted Total Both Groups (381)	Respondents with One Primary Audience (172)	Respondents with Two Audiences (209)

| Adults 55 and Over | Even Mix of Old, Young and Families | Adults, 31-54 | Young People, 18-30 | Families with Children | Other Audiences |

Nearly half (47%) of all respondents have primary audiences that are 55 and older. Those who chose one audience type were likely to select that group (94 out of 172, or 55%), as were those who selected two audience types (167 of 209, or 80%). **The second most prevalent group (20%) is an Even Mix of Old, Young and Families.** Respondents with two primary audiences tended to add that group, as well as Adults 31-54. Interestingly, though 125 of respondents are colleges, only 27% of them selected primary audiences that were of college age. Most of the 35 who offered other comments wrote that they served K-12 audiences; a few mentioned serving college students or all audiences.

Audiences and Mission Language. The table below examines two questions. Respondents were asked to indicate whether their audiences were primarily white/Caucasian or ethnically diverse, defined as at least 25% people of color. (Respondents were not asked to state how they know or track ethnicity.) Earlier in the survey respondents had been asked if their mission specifically mentions any of the following communities. They could check all that apply from the following:
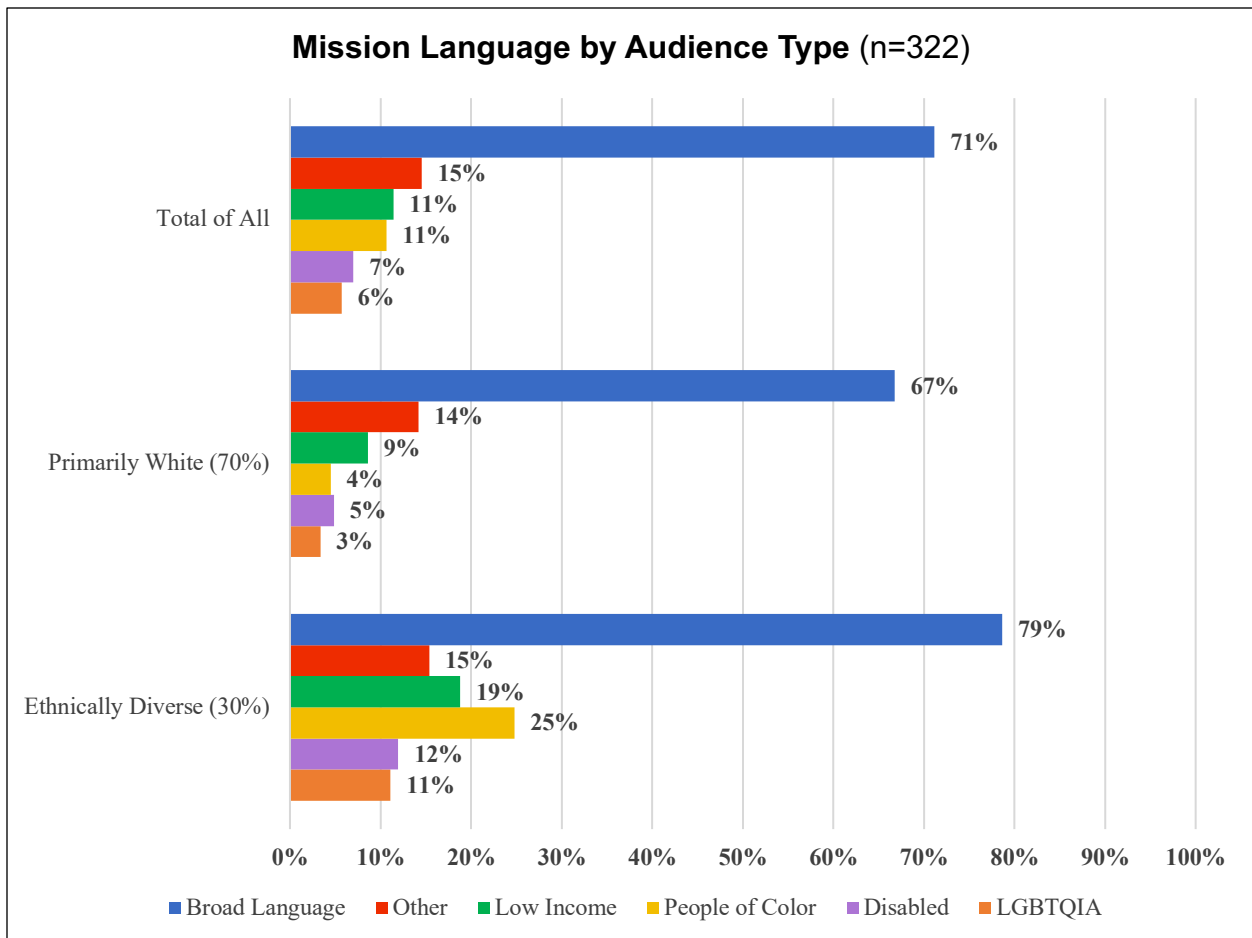
- Broad language about diversity and/or welcoming everybody to their programs and/or venues
- Low-income communities
- Communities of color (based on race and ethnicity including Black/African American, Latinx, Asian, Pacific Islander, Middle Eastern, Native American, and multi-ethnic)
- People who identify as living with physical, intellectual, and developmental disabilities
- People who identify as LGBTQIA+
- Other communities, with an option of describing them

Audience and Mission

Audiences (n=385)

Pie chart:
- Primarily white/Caucasian: 70%
- Ethnically diverse, meaning at least 25% people of color: 30%

Specific Communities Mentioned in Organizations' Missions (n=322)

Bar chart:
- Broad Language: 85%
- Other: 17%
- Low Income: 14%
- People of Color: 13%
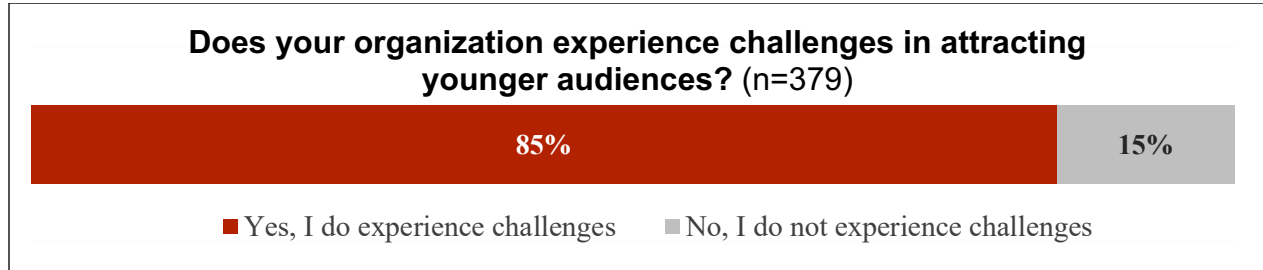- Disabled: 8%
- LGBTQIA: 7%

More than two-thirds (70% or 268) have audiences who are primarily white/Caucasian.
Within that 70%: 179, or two-thirds, checked, in the prior question, that their missions include broad language about diversity and/or welcoming everybody to their programs and/or venues.

The majority of organizations (85%) have missions that include broad language about welcoming "everybody" or diverse populations into their venues. A few respondents wrote of other communities included in their mission statements including youth (5), artists (4), women (3), older adults (2) as well as immigrants, nonprofits, college students, members of the Jewish faith and rural communities.

Further analysis appears below. A look at audience type, by mission language, reveals that **respondents who reach ethnically diverse audiences were more likely to name, in their mission statements, people of color as well as other groups**, including disabled, LGBTQIA and low income. Only 4% of respondents with primarily white audiences do so, whereas 25% with ethnically diverse audiences do.

Mission Language by Audience Type (n=322)

	Broad Language	Other	Low Income	People of Color	Disabled	LGBTQIA
Total of All	71%	15%	11%	11%	7%	6%
Primarily White (70%)	67%	14%	9%	4%	5%	3%
Ethnically Diverse (30%)	79%	15%	19%	25%	12%	11%

Younger Audiences. Respondents were asked if their organizations experienced challenges in attracting younger audiences (e.g., under 30). Regardless of how they answered, respondents were then asked for any workable solutions they use, or have used, to cultivate younger audiences.

Does your organization experience challenges in attracting younger audiences? (n=379)

85%	15%

■ Yes, I do experience challenges   ■ No, I do not experience challenges

---

Most respondents (85%) reported experiencing challenges in attracting younger audiences. There were no clear patterns or differences between respondents who checked "no" rather than "yes" to the above question.

Programming (169). **The majority who offered comments described efforts they were making to program differently in ways that attract younger audiences, or in hopes that their programs would appeal to the younger demographic.** Comments fell into two broad categories: those who mentioned, in a general way, programming "variety," "diversity" or efforts to attract younger audiences, and those who offered specific strategies. Most of these comments were brief or written as lists of short items.

- A large group (74) **mentioned programming, intentionally, in ways that appeal to "younger" audiences, or a "younger demographic,"** in general. Most were not specific about how they did so or who they presented; a few gave age ranges such as 30-40 or mentioned young adults.
- Eighteen mentioned **programming for "all" or diversifying programming,** implying that this strategy would, de facto, reach or appeal to younger audiences; of them, three mentioned comedy and two mentioned music. One college presenter strives to "present shows that appeal to ages 9 to 90 like Catapult, Cirque Mei, Straight No Chaser …."
- A few (6) mentioned **presenting artists who they described as younger, emerging or "edgier."** For example, one offers "music concerts that hit upon that generation." A small number (4) mentioned **programming younger artists on stage,** so that young people would see themselves represented.
- A few others (6) mentioned **programming artists who were popular and/or commercial,** particularly musical acts. Only a few mentioned names, including John Williams, Seattle Rock Orchestra, and Second City.
- **Programming music** was mentioned by 19, with a few mentioning forms such as "Americana/roots/bluegrass," "soul and blues bash," "progressive," or "independent musicians" in general.

- A total of 23 mentioned **programming specifically for families** including, usually, one or more family series and/or outdoor events. A few examples were circus, magic, animal acts, or films. As one urban independent organization mentioned, "our festival has always been family friendly so that over its 27-year history, there are lots of young people who have grown up attending." An important aspect of this programming, wrote about half of them, was keeping events affordable for the entire family.
- A total of 11 respondents wrote of developing **programming specifically for K-12 students,** including, for example, a matinee series, concerts during the day, or events in schools.

A college in rural Florida described combining some of these strategies. Three years ago, they launched a new series of contemporary, family friendly performances with $10 tickets for children/students. This season they selected 11 nonprofits that will benefit from 100% of the ticket proceeds from their performance of Dino-Light by Lightwire Theater: "Our goal is to get new customers into the venue at the start of our season."

Engagement. **Around 30 stated or described programming either unique events and/or events in uncommon venues that appeal to younger audiences.** One offered general guidance that seems to be practiced by these presenters, of "lessening structures and rules and creating engagement that is more open." They program at bars, breweries, clubs, private homes, or small or "hip, downtown" venues, and, for one, a skateboard park. A presenter in urban Nebraska provides a festival-like atmosphere through "partnering with a mobile art gallery, food trucks and local live musicians." Others program social events such as parties that "connect people with each other," or as another offered, "allow people to move about." An urban independent presenter in New Mexico experimented with a "site-specific dance event at a brewery." Another urban, independent presenter in Ohio offers "live performances as secondary attractions" to other events, such as a wine tasting with a live band or casino night with live entertainment and several others sponsor a date night. Just a few mentioned happy hours or offering food and a few mentioned offering spaces for socials after performances. An independent presenter in Minnesota recently added a host of new efforts, including an "acoustic gallery season (turned our lobby into a small venue space) ... New/emerging showcases (comedy and music) … [and] movie nights/Halloween party." A college presenter with its own (c)3 in Pennsylvania is exploring incorporating podcasts into its presenting series and collaborating with another college to present a student-driven TED Talk. A rural, independent presenter in the Virgin Islands is experimenting with a combination of new solutions:

> We will try this upcoming year to have two of our music ensembles presenting in our series to perform a special event at a local bar/restaurant. This has to work for the musicians as well for the restaurant. This particular restaurant draws a crowd from 25- to 40-year-olds. … a short performance with a set menu … would serve as an advertisement of sorts for the main concert.

A suburban college in Illinois shared its strategy and rationale for programming outside of concert halls and in neighborhoods:

> We use community outreach activities and residency activities to serve [audiences] where they gather instead of making them come to us. It's easier to move 5-10 members of a performance group than it is to get 500 people to come to us. Plus, putting art where they live, work and reside is more like public art and is more welcoming to them. It also gets us out of our Eastern-European-based habit of making people trek to a concert hall, which presents many obstacles to audiences.

Younger Input. **These 14 respondents described strategies of either hiring younger staff and/or including younger people in planning their seasons or events**. A suburban presenter feels it is "noteworthy that 4 of the 5 staff members are under 35 [and] programming committees are selected to cross socio-economic barriers." Another rural presenter has an executive director who is "under 30, as are many of our new board members and committee members" and has found that "including young people in the planning process has proven to be very beneficial" in influencing programming decisions as well as ticket prices. A music presenter worked with focus groups of younger audiences to find out what they would appreciate. Four more mentioned involving young people as ambassadors or advisers in making programming decisions and promoting performances among their peers.

Price. **These 68 respondents wrote of attracting younger audiences through pricing.** Colleges as well as independent presenters offer free, half price and/or discounted tickets for students and other groups. Some colleges offer tickets for as low as $5. A few mentioned what seemed like ongoing experimentation with price points for demographic groups. An urban presenter in Florida offers free tickets for children under 13 and $5 tickets for students above that age. A few mentioned ticket giveaways, rush tickets or pay what you can.

Partnerships and Groups. More than 50 respondents mentioned **collaborations with organizations and/or groups** aimed at increasing participation of younger audiences. Of them, about one-third were colleges or independent presenters, who collaborated with college academic departments or faculty to connect curriculum to performances, and either requiring or encouraging students to attend. Others mentioned "outreach" for programs for school systems and groups, including in-school programs and matinees. Still others partnered with a range of groups to encourage participation; those that were mentioned by name were PTA, Irish dance club, TeenTix, Young Professionals, and Yelp. One stressed that "partnerships and collaborations are key in … cultivating younger patrons" and went on to describe giving free tickets to Big Brothers/Sisters and their little brother/sisters.

No Solutions or Challenges (20). This small group **has not found solutions to reaching younger audiences.** One is "still searching for workable solutions"; another has "yet to find any" solutions; and a third has had "very limited success." As a suburban unit of a government presenter states in Florida, "We stopped programming for them after multiple attempts," feeling

they were too close to major family attractions. A rural presenter reports facing barriers of distance and demographics and has seen: "No major successes here. The community doesn't have many young people, and we are in a rural setting, so getting young people to drive a long way to get here just hasn't happened."

Marketing and Social Media. A total of 52 mentioned marketing, with nearly all of them stressing social media. Beyond that, most did not share specifics, aside from occasional mentions of Facebook or Instagram.

Success Stories. A small number of respondents wrote more detailed responses, typically to share success stories on the ways in which they had analyzed, responded to and seen results from their efforts to market to younger audiences. An urban independent presenter found success in combining strategies of pricing, event format and marketing. Finding lower student engagement for its general programming than for its two festivals, they launched a new student pricing program, resulting in a "great increase in student engagement due to a lower financial hurdle and marketing specific to students." A suburban music presenter that is a unit of government finds consistent success attracting younger audiences due to the ways in which it programs and markets:

> I program emerging artists whose life and work present undeniable intrigue and then market our shows using a vast and diverse combination of print, electronic and digital media. Additionally, I play up the cache of a unique and adventurous experience— traveling to another part of the world for an evening—complete with concession offerings—that reflect the locale from which the artists have come.

A rural presenter described, in earnest, the range of efforts it makes to reach younger audiences:

> Programming includes local junior musicals and plays that engage 20-to 40-year-olds as their kids take the stage. We added an improv series and open mics to engage college-aged students. [We] continue to program a school series and vary the films we show to attract diverse audience interest.

F. Community Engagement:
Forms, Strategies, and Challenges

In this section, SAMPs reflect on their community engagement, by first reporting on the forms of engagement they offer and partners with which they work. They then share some of the ways in which their programs respond to their communities' needs and preferences, as described earlier in this report. Finally, they reflect on challenges in offering audience engagement events.
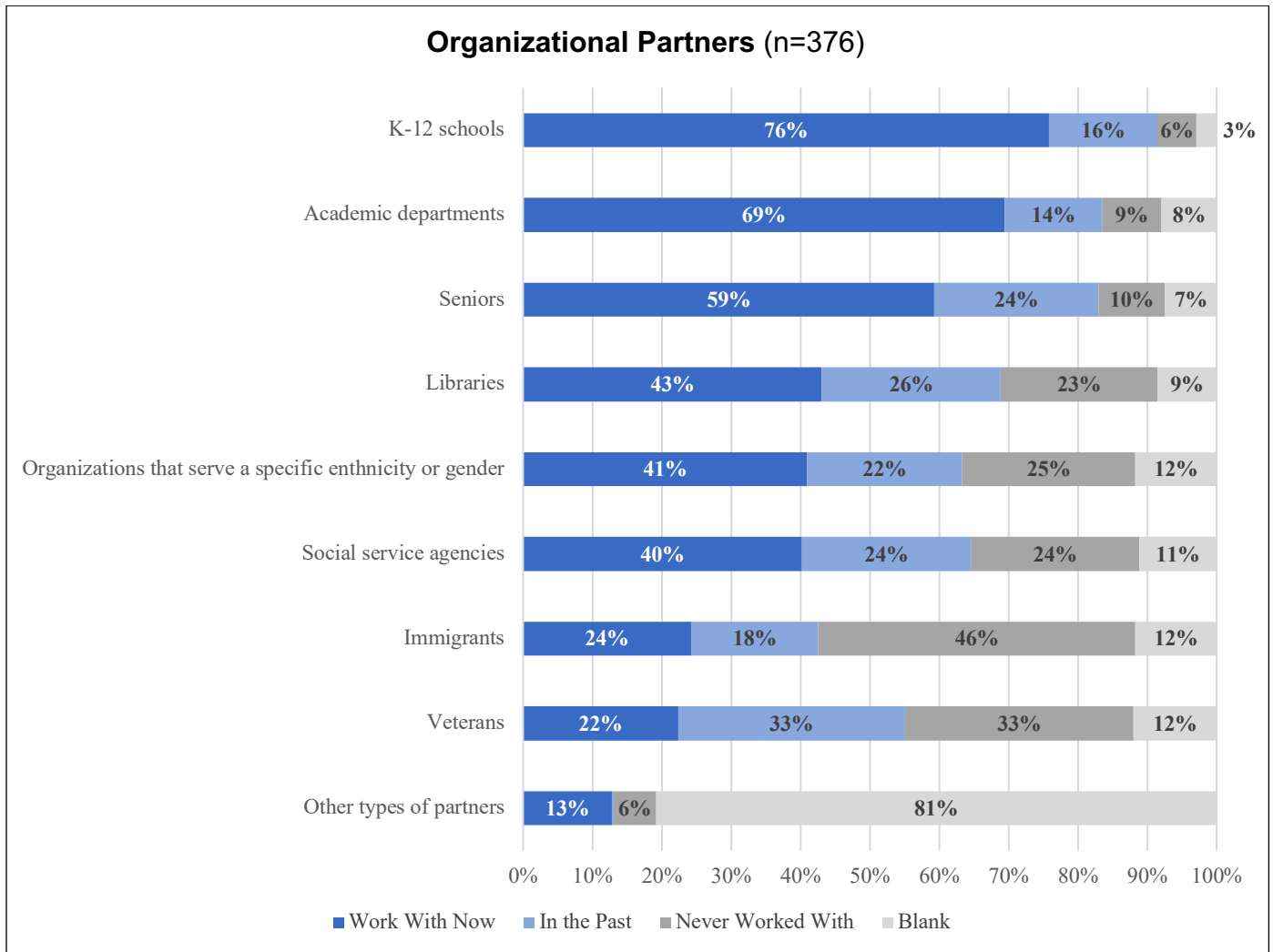
Forms of Engagement Offered. Respondents were asked which forms of engagement they offered to the following audiences or community members. They could check multiple options.

- Partnerships with other organizations to generate and diversify audiences
- K-12 programs for schools
- Free programming
- Conversations, such as pre- or post-show talks with artists or lectures by artists, scholars or others
- Residencies
- Programming at other locations
- Events for audiences to observe the creative process, such as open rehearsals
- None of the above

Forms of Engagement Offered (n=379)

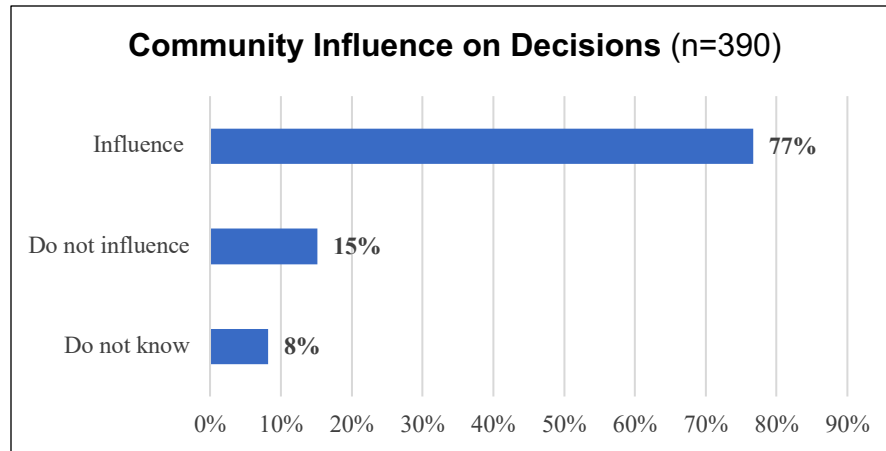|	
Partnerships with other organizations	80%
K-12 programs for schools	76%
Free programming	77%
Conversations	72%
Residencies	51%
Programming at other locations	50%
Events to observe the creative process	31%
None of the above	3%
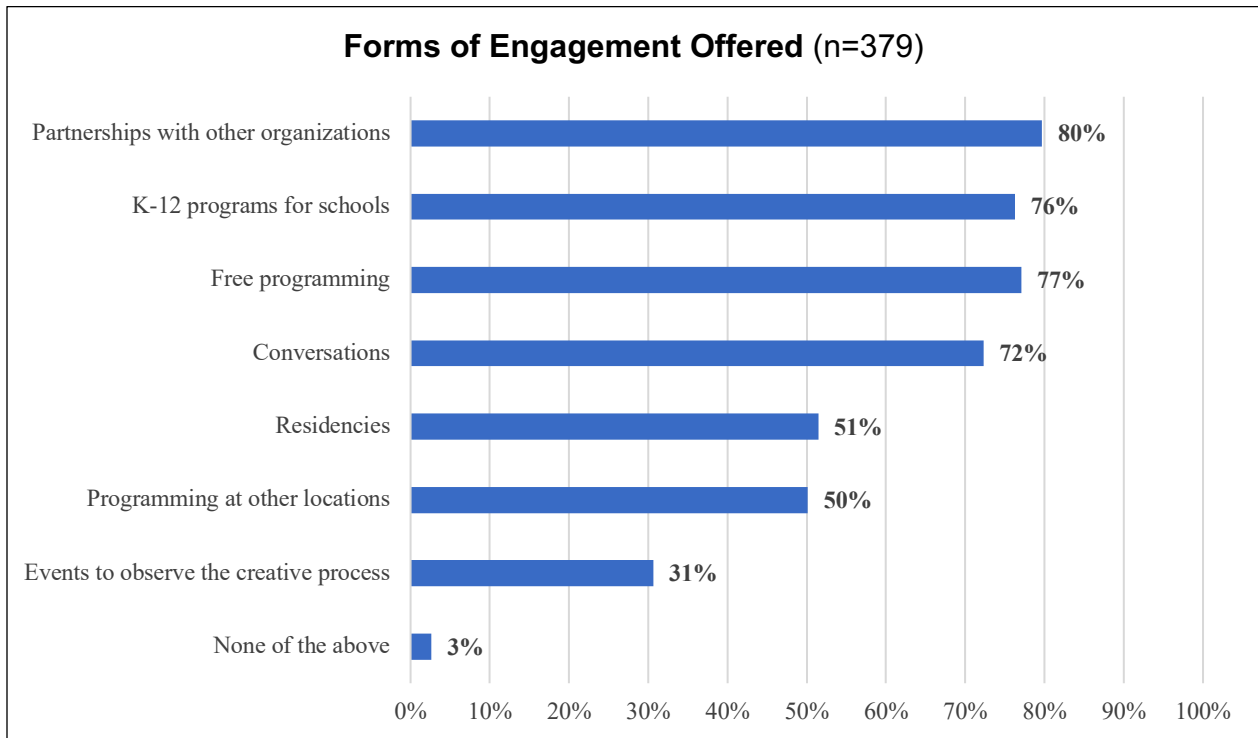
As the top blue bars show, **about three-quarters of respondents offer four forms of engagement for their audiences or communities:** partnerships with other organizations to generate and diversify, K-12 programming, free programming and/or conversations with artists or experts.

Organizational Partners. Respondents were asked to indicate the types of organizations with which they had partnered, either now or in the past. Partnering, for this question, was defined as working together to offer engagement programs or cultivate audiences, but did not mean basic marketing such as sending e-blasts for events alone. The graph below illustrates the proportions of respondents who work, now or in the past, with each type of partner.

Organizational Partners (n=376)

	Work With Now	In the Past	Never Worked With	Blank
K-12 schools	76%	16%	6%	3%
Academic departments	69%	14%	9%	8%
Seniors	59%	24%	10%	7%
Libraries	43%	26%	23%	9%
Organizations that serve a specific enthnicity or gender	41%	22%	25%	12%
Social service agencies	40%	24%	24%	11%
Immigrants	24%	18%	46%	12%
Veterans	22%	33%	33%	12%
Other types of partners	13%		6%	81%

By far, as indicated in the dark blue above, respondents' largest current partners are educational, primarily K-12 and secondarily colleges. More than three-quarters partner with K-12 schools and more than two-thirds partner with academic departments in higher education. Notably, nearly 60% partner with seniors groups. A consistent amount—40%—work with other types of organizations, including libraries, social service agencies and immigrants. Other partners include other organizations serving the arts (23), among them museums, presenters and organizations serving dance, music and film; disability (11), youth and teens (7); colleges (2); churches (4); commercial (3); juvenile systems (2); military (2); and government and civic (2); as well as a Greek organization. Eight simply stated that they worked with a range of partners.

Community Influence. Respondents were asked if any of the aspects of their community, as covered in Section A of this report (e.g., gentrification, changing demographics, immigration, or politics), influenced their decisions about programs or strategies to generate audiences.

Community Influence on Decisions (n=390)

Influence	77%
Do not influence	15%
Do not know	8%

0% 10% 20% 30% 40% 50% 60% 70% 80% 90%

The 77% of respondents who were influenced by those aspects were asked to describe how, and all but one provided a comment. Their comments are summarized below.

Programming. The vast majority of respondents focused their comments on how their broader environment informs their programming decisions.

The largest number (55) offered similar, brief comments about programming in a manner that presents diverse artists and/or attracts diverse audiences, with some mentioning equity and inclusion. A few examples illustrate:

- From a rural independent organization: "I book according to our demographic's age and income level."
- From a rural college: "We are diversifying our programming to better reflect our community and campus curriculum."
- From a suburban college: "I am responsive to community needs, desires and program around social impact, diversity and inclusion."
- From an urban independent: "We seek to diversify our programming options and to find grants to support them, in order to get audience diversity in terms of race, age, and income."

A group of about 43 offered more **intentional strategies** to obtain diversity in their programming or audiences. Some of their intentions, as written, are:

- A New England college tries to "bring more **relevant programming** with the times. While our audience age and make up stays the same, we want to keep them engaged with new and exciting programming that opens their eyes to current issues."

- A Southern presenter using a government facility programs "specifically to include **marginalized populations** in our community and to address inequities in diversity and inclusion."
- A midwestern museum has a "strong desire to expand audience access, as articulated in the institution's recent Strategic Plan and Diversity, Equity and Inclusion Plan."
- A presenter in New York City feels "ever more need to present stories that are platforms for **creating empathy and awareness** for immigrant issues, and homelessness."
- Several considered or used **nontraditional venues,** such as brew pubs and spaces outside the downtown area.
- Several mentioned programming for **specific cultures and demographics,** including Caribbean, Latinx, Somali, and border communities and women.
- The only discipline that was mentioned, by around 10, was **music,** including Celtic classical, jazz, rock and roll, world, chamber, and pops, all of which presenters had learned would ensure a crowd.
- A general thread mentioned, but not emphasized, within some of the programming comments above was the financial bottom line—whether or not they could **sell tickets.**

A small number expressed more **nuanced programming goals that tie intention to strategy.** One of them, a Southern rural college wrote:

> We really try to bring programming that is representative of all communities; our hope is that each member of the community will see themselves represented on stage at least once a season …. We are now programming for multiple audiences; each show is targeted towards certain groups, rather than targeting the whole season towards one group. It has reduced the number of season packages [but] increased the number of single ticket purchasers.

A group of 26 wrote of other ways in which they **program for their communities' demographics and needs.** "As the primary ticket buyers," wrote one college, "they factor heavily into our … choices." A different college that has "always been sensitive to local [and] national issues that impact our community" attempts to "curate issues that help create civic awareness and discourse." A few wrote of asking the audience for feedback on programming decisions; four conduct audience surveys and others are in regular dialogue. For example, one in an urban area wrote of "actively engaging in conversation with community stakeholders, the board, and staff about mission and vision for the organization in a changing neighborhood." Yet others cater to the ages of residents, particularly older adults. One presenter is located in a retirement community, others have core audiences of retirees or "empty nesters," and another described a "mostly an older audience and musical tastes tend to classics and popular 1940 - 1980." Some wrote of programming for a range of ages, such as one who "has moved from tributes that appeal to older residents to include programming for youngsters, young couples on date nights, and families." Another is "adjusting our season to meet the expectations of the Boomers as well as the newer generations."

The programming for around 24 respondents reflects their interest in reaching younger audiences, including families. Most of their comments were general, realizing that as older adults age out of attending due to health or other issues they must, as one said, "find ways to bring in a younger audience, 30-55." College presenters were more specific, such as one who tried to "curate presentations that will either attract the younger audience or will fulfill a syllabus requirement for a general education course."

Others described making programming decisions that reflect social justice issues, including immigration. One is nurturing a program aimed at helping immigrant teenagers "acclimate and improve their English skills through songwriting specifically and music in general." Another, in the South, strives to program artists who appeal to "American and international" audiences, because their town is "home to thousands of refugees and immigrants and we work to showcase performers that represent traditions from across the world. We want people to see themselves on stage." A presenter in a border town seeks to "uplift the stories of Latinx artists and the broader Latino community as examples of positive, counter narratives to anti-immigrant sentiment." Yet another, in western Pennsylvania, considered programming decisions in light of their K-12 needs: "Since the public school population is 90% minority (80% Latinx), we look for outreach programs that may include bilingual elements. Unfortunately, it is generally difficult to sell difficult to sell Latinx artists in our presenting series, even through partnership with our Latino Chamber of Commerce and Centro Hispano."

A few wrote of programming in response to the current national political climate, such as one who must "be conscious of the effect of the 2020 election on ticket buying … [and is] constantly considering the political nature of what we do." Another worried about the fallout of politics on ticket sales: "Fall 2018 attendance for us was HORRIBLE across all genres. After talking with other venues and artists, the only common denominator was the election. We are very concerned about fall 2020 and how that election will impact attendance." An urban presenter works to "offer programming that addresses the national climate, as well as would be attractive to emerging communities." Some embrace controversy, such as a rural presenter in the West who is "leaning into the discomfort by programming shows we hope will help us connect across subgroups."

Another smaller theme emerged from some: the need to program for conservative audiences or to avoid political controversy altogether. These presenters value creating conversations in their venues: "I have to be careful about how identity politics are portrayed so that I can build conversations with my audience and not alienate them." But others acknowledge the energy expended in communities that are "extremely conservative, which is reflected in our programming. We are trying to branch out and diversify, but with a largely homogeneous population this requires special effort." Another adds, "We make sure we have programs that appeal to an older audience. While we do keep diversity in our programming offerings, we are careful that content is not too politically charged."

Price. These 22 respondents either mentioned pricing in general, or the importance of keeping pricing low. About half were rural presenters. They mentioned offering a mix of free

and paid events, keeping ticket prices affordable, or the mandate to identify funders to subsidize ticket prices. Most comments were general, such as "We are attempting to reach all constituents in our community by providing more low cost/free programming and more diversity/conclusiveness in our programming." A few saw the connection between price and exposing audiences to new things. One is committed to offering its free festival in order to "bring diverse music to a rural community … [and] overcome financial barriers so that more people are able to experience different cultures represented through music and workshops." Another sets a more specific intention between price and access: "Our mission is to bring performances to underserved audiences in our remote, and I do mean remote, area of New Mexico. We try to bring events to serve all our constituents, not just the affluent. We give over 300 comps to our communities."

General Comments (30). Twenty made general comments about the degree to which the five areas influence them, such as "in every way, really" or "serving the entire community." Three more offered more philosophical approaches, such as one who wrote: "We try to fill niches, we try to uplift spirits, we try to inspire" and another who wrote "purchase programming that will bring people together and that reveals common goals and values." Six mentioned audiences, overall, and being "welcoming."

Note: In the consultant's view, among the respondents to this question are some of the leading presenters in the country, who take risks in their programming, and who are connected to their communities. Perhaps because of the nature and length of the survey, their comments, and this analysis, do not reflect the nuance and depth of their commitment to presenting.

Challenges in Offering Audience Engagement. Respondents were asked whether they have encountered any of the following challenges in offering audience engagement events. They could check all that applied.

- Attendance is low.
- It requires too much labor and other cost.
- Artists do not want to participate.
- Other challenges, which respondents could describe.

Challenges in Offering Audience Engagement Events (n=306)

Challenge	Percentage
Attendance is low	73%
Too much labor and other cost	46%
Other challenges	24%
Artists do not want to participate	13%
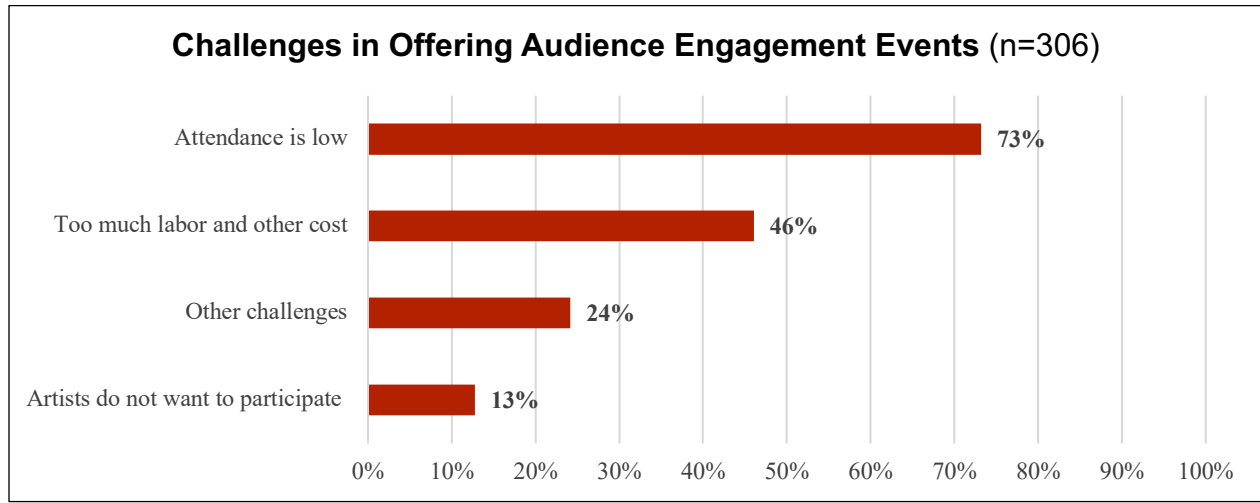
The biggest challenge, reported by about three-quarters of respondents, is **low attendance** when offering audience engagement events. Nearly half found that audience engagement requires **too much labor and other costs.**

A quarter (74) of respondents offered other comments that shed additional light on their attitudes about audience engagement and that echo these two top challenges. The biggest single challenge, expressed by 12, was the lack of available staff to plan time-intensive engagement activities, coupled with the tensions that sometimes exist among different departments, when staff is expected to collaborate on engagement activities. One wrote of "indifference from faculty" and another observed that "it has not always been clear whose job it is to make these events successful." Another 12 comments related to artists, who either had time constraints (4); charged higher fees if they provided engagement activities (4); or didn't bring creative ideas for engagement activities (4).

A few wrote of attendance challenges for audience members who "think they're too busy"; who will attend engagement activities but not performances; or who do not value engagement activities if they are free. A few noted that engagement events, even if free to audiences, incur costs to the presenter. Most of the remaining challenges related to schedule, including finding a time that will work for the venue, audience, and artist; transportation two engagement events, particularly if they are offered offsite; and marketing, particularly when engagement activities

are offered with partners, resulting in, as one wrote, "lack of awareness, confusion among the attendees about who is offering the event."

Notably, the largest response, offered by 21, most of whom were independent presenters, was their *lack* of challenges, and positive experiences with offering engagement activities. One wrote that engagement activities are "critical to meeting our mission" and another advised that "if you don't encounter challenges you aren't taking chances."

G. Needs and Final Thoughts

SAMPs share their opinions about their capacity and needs. They consider, preliminarily, responses that might be addressed by APAP or the RAOs. Then, they share their final reflections on participating in this research, including gratitude to APAP, and some reiteration of their strengths and services needed.

SAMP Statements. Within the 2018 focus groups described in Section C, attendees discussed false assumptions that are made about small and midsized presenting organizations, such as that they operate identically to large organizations. Attendees were asked what they wished for other presenters and funders to know about them. This question was asked so that SAMPs could correct the record about how they are perceived. In the focus groups, SAMP leaders made the statements below. Within the survey, respondents were asked to register their agreement or disagreement with the same statements. Small and midsized presenters …

- Are committed to presenting artists and programs of quality
- Navigate many challenges
- Manage limited budgets
- Can be thought of as "small and mighty," given their abilities to stretch budgets and solve challenges
- Know their communities
- Present successful events
- Are pitched artists who are either too expensive or otherwise inappropriate for their budget and market
- Commonly experience agents who do not understand their booking needs and cost structures

Respondents Agreement and Disagreement With the Following Statements (n=380)
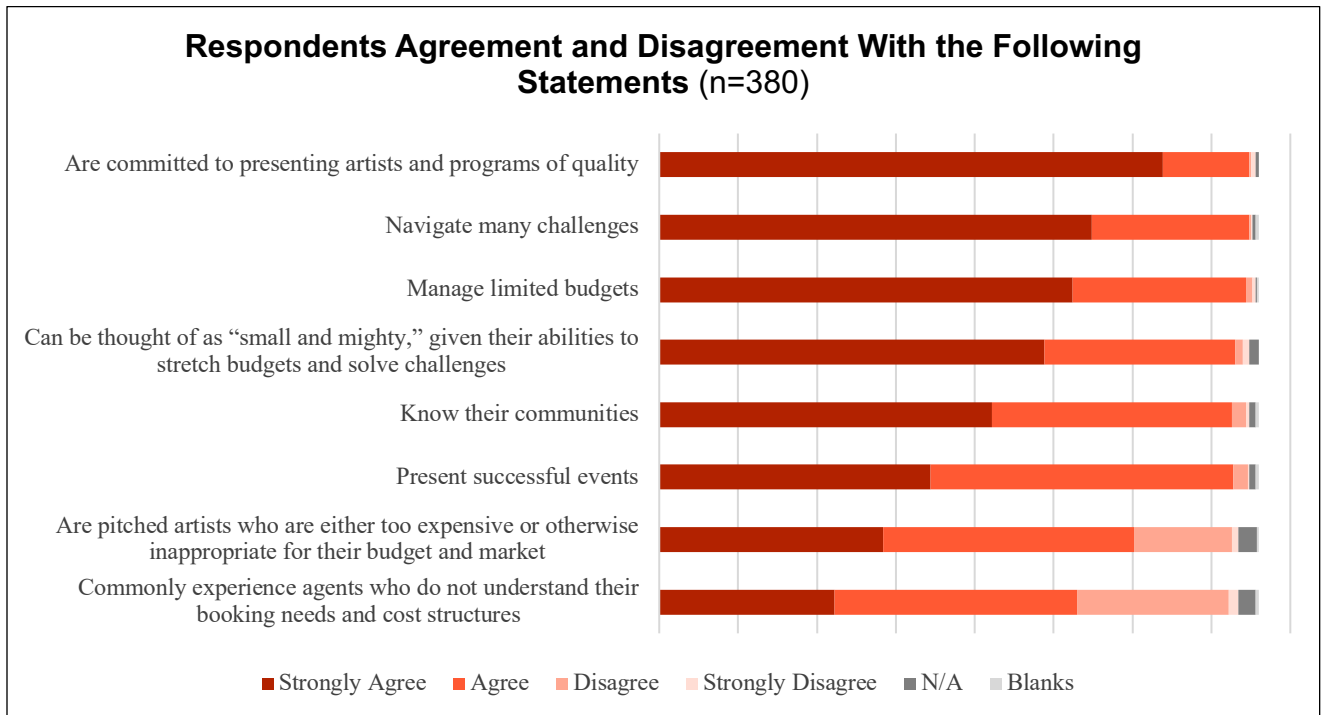
Most of the statements received nearly unanimous agreement. There was a **preponderance of strong agreement within the four statements about commitment to quality and navigating challenges.** The only two statements that showed any degree of disagreement were the two statements related to working with agents.

Use of an Additional $100,000 Per Year. Within surveys of nonprofits, respondents commonly ask for more funding. This question sought to understand how such funds would be used, which can reveal respondents' urgent, or concrete, needs. Respondents were asked if given another $100,000 per year, to be used in any way that they wished, how they would use it. They could only pick one of the following choices:

- Additional staff
- Programming
- Venue improvements
- Other uses, with comments on what those uses would be.

How an additional $100,000 per year would be used (n=376)

Category	Percentage
Additional staff	51%
Other uses	23%
Programming	17%
Venue improvements	9%
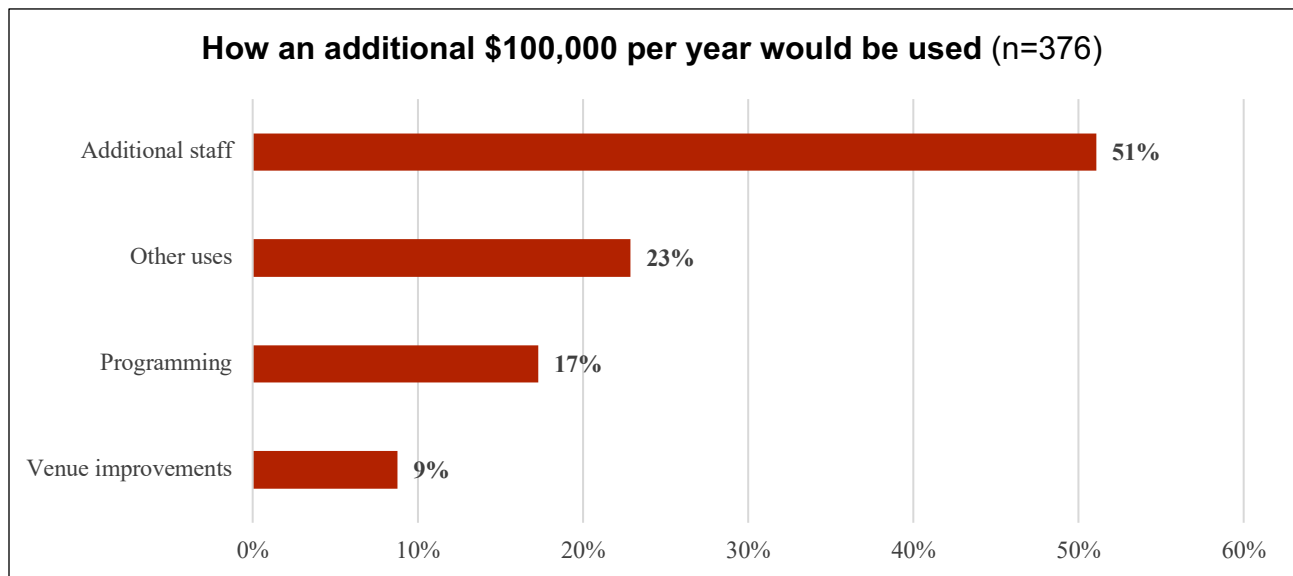
When given only one choice, more than half of SAMPs selected staffing. However, with the 82 respondents who offered other comments, most reiterated the choices listed above. **The majority of those 82 would spend funding on staffing in combination with programming (31) or staffing alone (14)**. The few who offered more specifics mentioned adding staff in fundraising or marketing; increasing positions from part time to full time; or increasing salaries or benefits. Another seven would spend funds on marketing alone, or in combination with other areas. More than 40 mentioned programming, but few were specific about how programming would be addressed (only two of these wrote about programming alone). Seven wanted to balance their budgets, either making up for deficits or ongoing annual shortfalls or, as one said, "straight-up operations." Five mentioned upgrading their venues (only one of whom wrote about venue alone). Seven simply stated a general range of uses. One of the few comments that was specific declared: "Everything please! I'd split between the venue and staff, plus one big, expensive show." (Those who wrote about singular uses of funds for staffing, programming, or venue were added to the counts and graph above.)

Organizational Capacity. Respondents were asked to what degree their organization's capacity, both staffing and expertise, limit their ability to do the following:
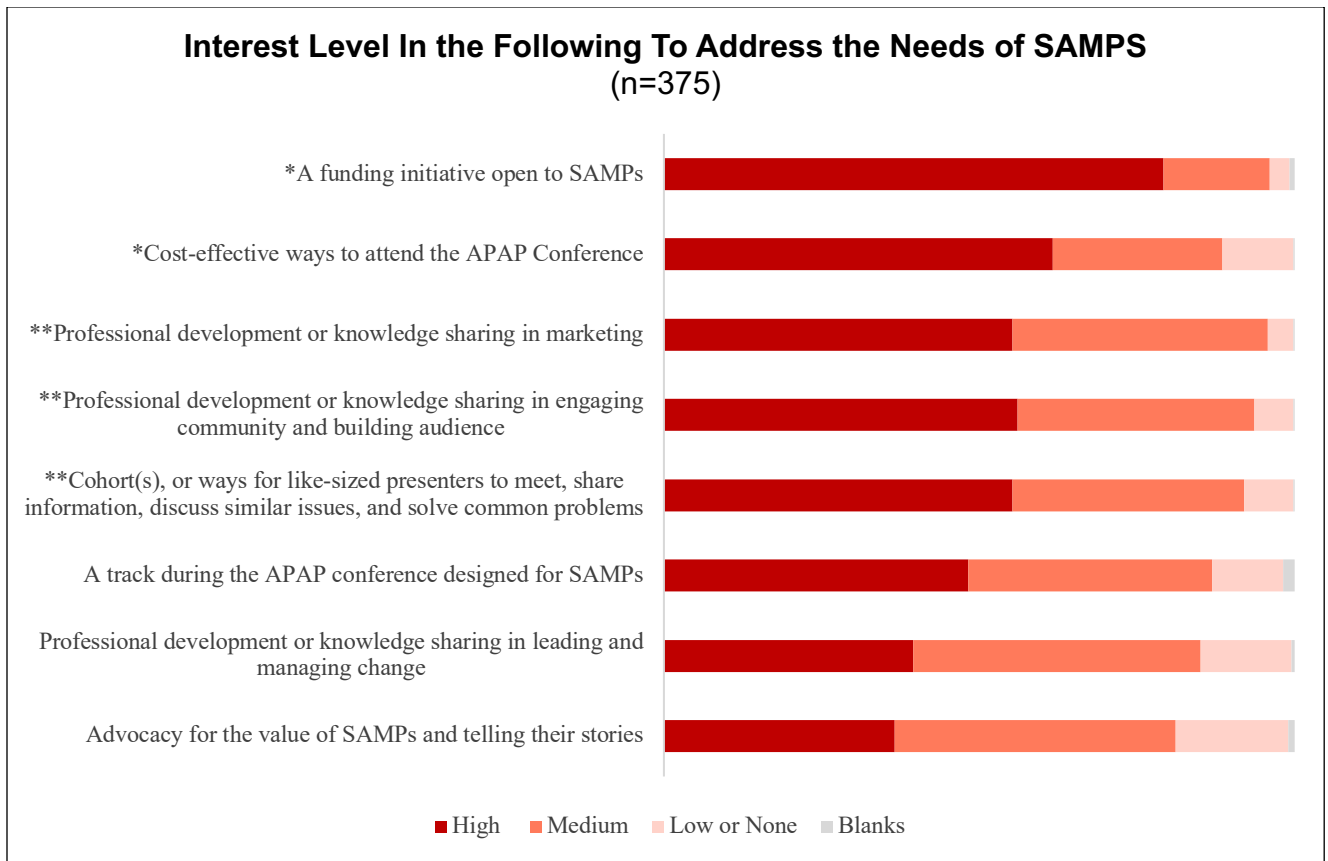
- Raise money
- Reach culturally diverse audiences
- Pursue partnerships to generate and diversify audiences.
- Grow their loyalty base
- Reach/engage younger audiences
- Produce standard audience engagement activities, such as pre- and post-show talks.
- Move board and staff forward on diversity, inclusion, and equity issues
- Retain staff

How Organization Capacity Limits Abilities (n=376)

Raise money
Reach culturally diverse audiences
Pursue partnerships to generate and diversify audiences
Grow their loyalty base
Reach/engage younger audiences
Produce standard audience engagement activities, such as pre- and post-show talks
Move board and staff forward on diversity, inclusion, and equity issues
Retain staff

■ Extremely ■ Somewhat ■ Minimally or Not at All ■ N/A ■ Blanks
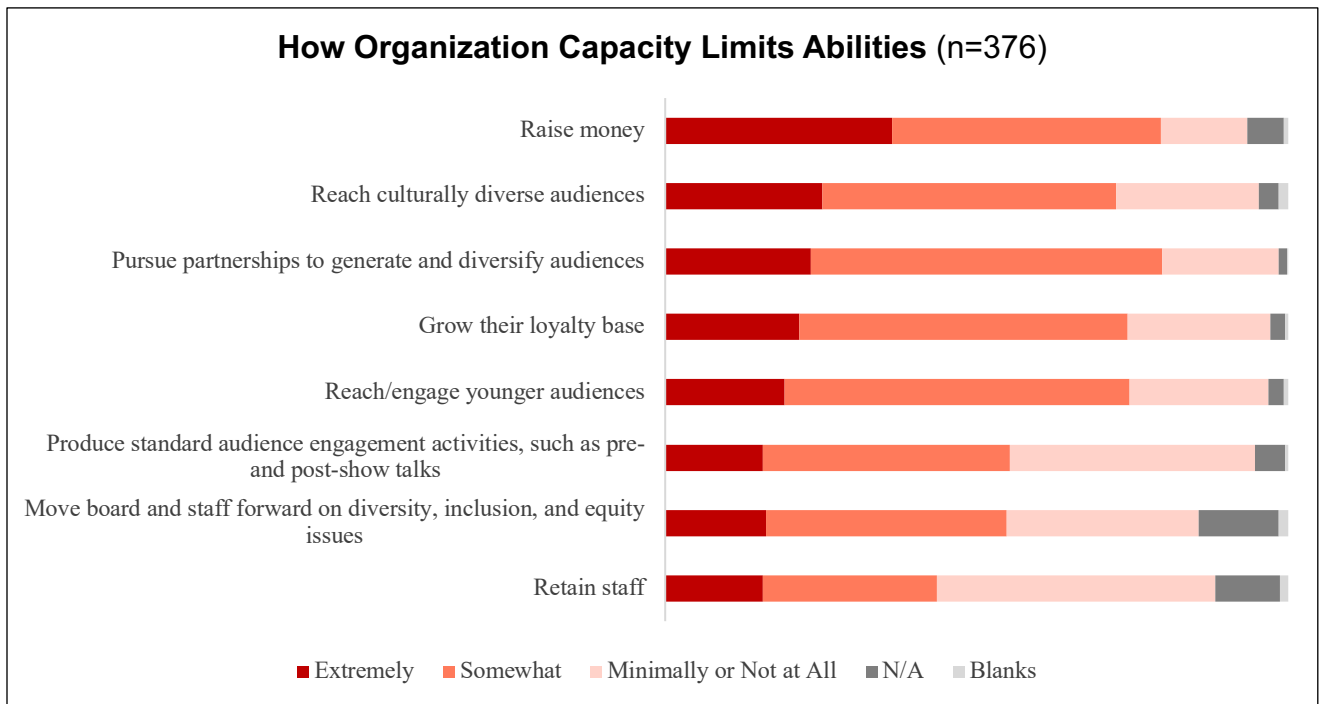
The top limitations in SAMPs' capacity, appear to be in areas focused on their external relations, including garnering money, partnerships and audiences. These areas involve developing or nurturing external relationships with funders, organizations, patrons and audiences. Respondents appear less limited in controlling their internal management, including staff retention, progress in addressing diversity, or producing standard engagement activities. It is surmised that they can influence and control these internal areas, whereas addressing external circumstances falls largely beyond their control and requires an investment of resources.

Needs of SAMPs. Respondents were informed that APAP is considering ways to address the needs of SAMPs and they were asked to indicate their interest level in the following:

- A funding initiative open to SAMPs
- Cost-effective ways to attend the APAP Conference
- Professional development or knowledge sharing in engaging community and building audience
- Professional development or knowledge sharing in marketing
- Cohort(s), or ways for like-sized presenters to meet, share information, discuss similar issues, and solve common problems. Meetings might occur in person or virtually.
- A track during the APAP conference designed for SAMPs
- Professional development or knowledge sharing in leading and managing change
- Advocacy for the value of SAMPs and telling their stories

Interest Level In the Following To Address the Needs of SAMPS
(n=375)

- *A funding initiative open to SAMPs
- *Cost-effective ways to attend the APAP Conference
- **Professional development or knowledge sharing in marketing
- **Professional development or knowledge sharing in engaging community and building audience
- **Cohort(s), or ways for like-sized presenters to meet, share information, discuss similar issues, and solve common problems
- A track during the APAP conference designed for SAMPs
- Professional development or knowledge sharing in leading and managing change
- Advocacy for the value of SAMPs and telling their stories

■ High ■ Medium ■ Low or None ■ Blanks

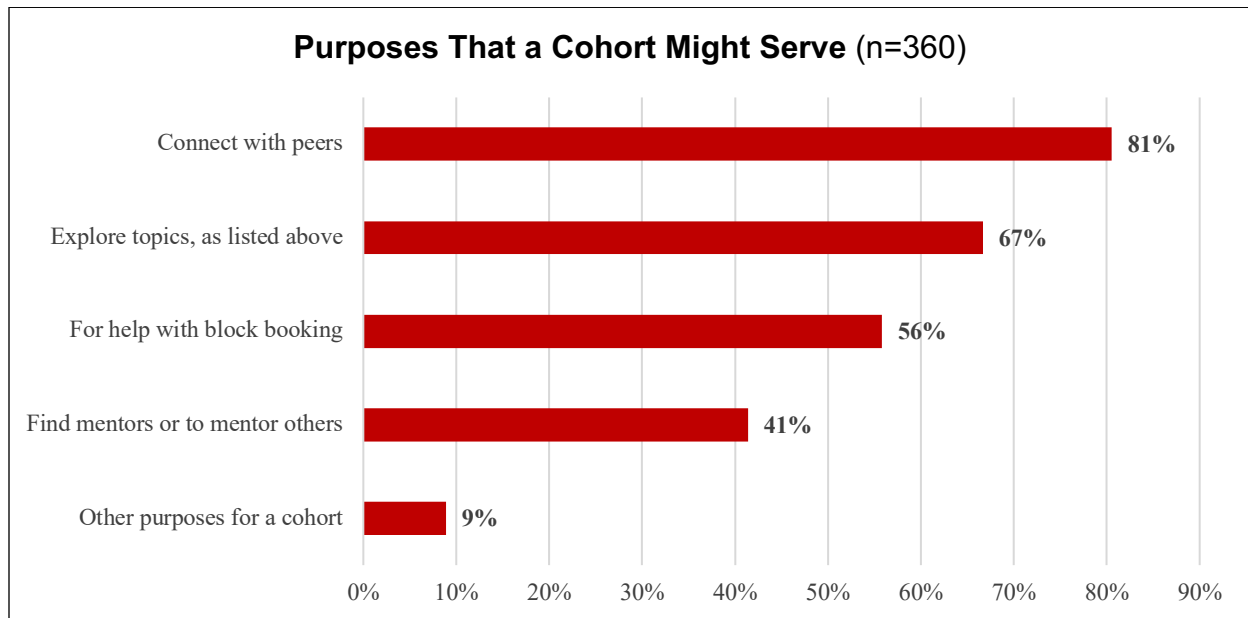* Items that provide money or save costs. ** Peer sharing.

Nearly all respondents to this question registered interest in nearly all needs. Not surprisingly, the **interest levels were highest for the two areas that generated money or cost savings (*).** The most interest—both in numbers and intensity—was for a funding initiative that would serve SAMPs. The second highest interest is another need that provides financial support, through cost-effective access to the APAP conference. **The next three—with nearly identical**

interest levels—were about peer sharing (**) in marketing, audience engagement, and/or through a peer group. These three areas were rated of high interest by more than half of respondents. Managing change and advocacy were of lower interest, but (per the question on community change above) these presenters were not navigating dramatic levels of change, in any area except gentrification.

The interest level in addressing these needs echoes the question on page 68 about organizational capacity, where respondents' organizational capacity limits their abilities to garner money and build external relationships.

Cohort Purposes. If respondents were interested in being part of a cohort, they were asked to indicate what purposes it might serve from the following. They could check multiple options.

- Connect with peers
- Explore topics such as: the challenges of owning and operating buildings, issues that arise in presenting in areas that are similar (e.g., rural, suburban or urban), self-care and work-life balance for staff, dealing with interoffice dynamics and challenges among small staff
- Help with block booking
- Find mentors or mentor others
- Other purposes, which respondents could describe

Purposes That a Cohort Might Serve (n=360)

| Purpose	Percentage
Connect with peers	81%
Explore topics, as listed above	67%
For help with block booking	56%
Find mentors or to mentor others	41%
Other purposes for a cohort	9%

Most respondents (79%) chose multiple purposes. More than half of all respondents chose three or more purposes. **For the majority—81%—a cohort would allow them to connect with peers. Two-thirds want to address some of the topics listed above in the question.**

A total of 32 opted to enter other comments, which spanned a range of purposes. Ten listed areas of management, including staffing, both retaining and transitions; working with boards, and project and time management; half were college presenters who wanted to address the unique needs of university presenters, with one adding "in rural-suburban settings." Three wrote of marketing, including creative strategies, such as "dealing with the culture of 'cancel' that is not willing to experience the world outside of their personal silo." Three wrote of audience engagement around equity and inclusion. Three mentioned their current participation in presenting networks that are serving some of the purposes listed above. The remaining responses were general in nature. Note that these comments represent fewer than 10% of all respondents.

Preferred Way to Find Artists to Present. Knowing that most presenters use a combination of methods to select artists, respondents were asked for their single, most preferred way from the following options:

- Live showcases
- Attending a public performance by the artist(s)
- Representation by a manager/agent I trust
- Online work samples and websites
- Recommendations/word of mouth from peers
- Other, which respondents could describe

Preferred Way of Finding Artists (n=369)

* Live showcases	24%
*Attending a public performance by artist(s)	19%
Other ways	15%
**Represented by a manager/agent I trust	15%
Online work samples and websites	14%
** Recommendations/word of mouth from peers	13%
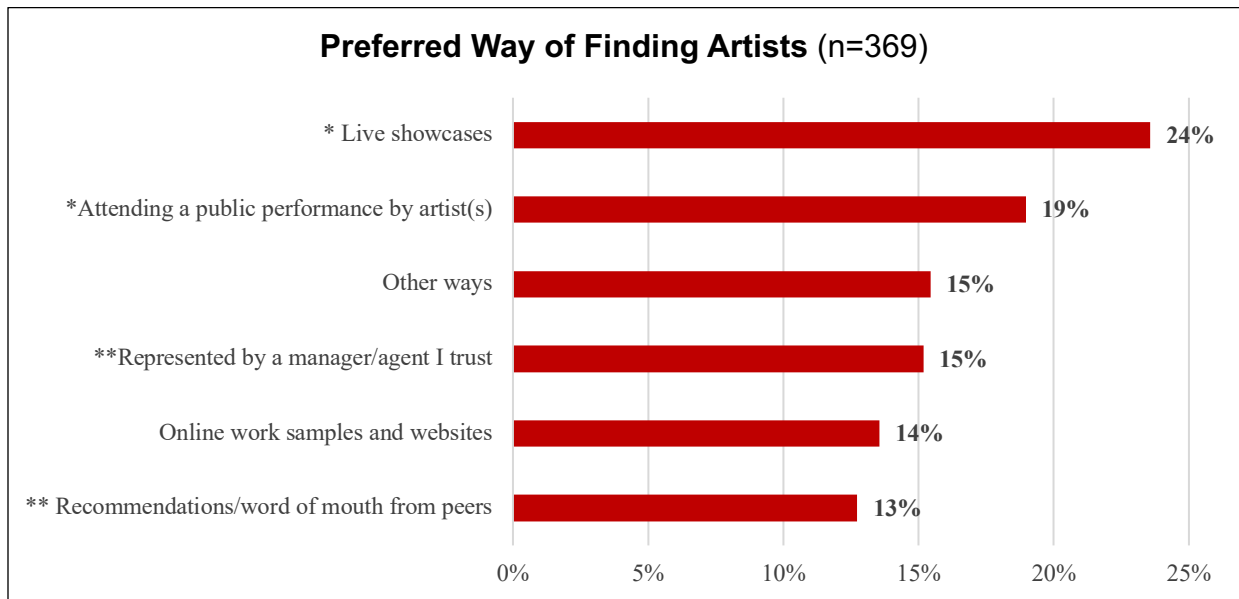
*Live viewing   **Referrals from others

With one exception, respondents chose a nearly even mix of ways, with no clear majority. However, as the top two bars show, **nearly half (45%) rely on some form of live viewing** (*), either through showcases or live performances, and **28% rely on some form of personal vetting** (**), whether representation by a trusted manager or agent, or recommendation of peers. A total of 59 respondents checked Other and wrote descriptions. Most wrote of using all or a combination of the above methods, with a few stating it was difficult or impossible to choose just one. A through-line among comments was the **value of recommendations,** which might come from staff, faculty, patrons, peers or peer networks, agents, audience members or, in rare instances, artists themselves. As one wrote, "The recommendations of trusted agents, managers and peers followed by vetting online and live performance if the opportunity presents itself." A few wrote of their need to rely on a particular method that fit their unique circumstances. For example, several in rural settings explained their reliance on online research: "It's always best to see it live, but I mostly have to search through peers and Internet as I live in a rural community." A presenter of "primarily folk and traditional arts from minority and international populations" relies on artists who have been previously presented to introduce the presenter to other artists.

Final Thoughts from Respondents.

> Thank you for taking the time to do this research. I appreciate the questions about agents and booking in particular …. It's important that they understand our needs are just as critical to success as the needs of larger presenters …. I also think it's important—and this is a big challenge—that "one size fits all" types of presentations at conferences often leave small presenters feeling discouraged because they don't have the bandwidth/resources to take on those types of initiatives or projects. I appreciate that APAP is thinking about how to integrate sessions for SAMPs into the conference.
>
> > -A rural college presenter

> Urban presenters, consultants, technical service organizations usually see small presenters as "less than" or that they know what these presenters need. So great care must be taken to not impose urban-centered, large presenters' methods on small presenters. You need people who have actually "done" the work in those areas to pair with larger organizations to help create best practices.   -An urban college presenter

At the end of the survey, respondents were asked if they had any final thoughts to share that the survey had not asked about and 95, or about one-quarter, chose to do so. Most of respondents' comments were brief and made singular points. But, as illustrated by the comments above, about one-third wrote long comments outlining multilayered problems and ideas for solutions.

One-quarter (24) thanked APAP for conducting this survey, with some offering general comments, such as "*Adelante*!,"[6] while others **appreciated APAP's interest in SAMPs.**[7] A few representative comments are as follows: "I appreciate the effort to learn more," "Thank you for seeking evidence of our experience," "I really appreciate you asking," and "Thank you for beginning to address our needs and issues." Another offered, "I have been a successful and small mid-size presenter for over thirty years. I commend APAP for doing this." **Still others, within their messages of thanks, look forward to using and sharing the information generated by this survey.** As one said, "This seems like a really valuable survey and I really look forward to seeing the results. Thanks for your work in putting it together." **Several offered thanks to APAP and regional organizations for this effort.** Arts Midwest was mentioned by name: "I greatly appreciate the work of APAP and AMW in helping small organizations like mine. Were it not for this assistance, I am not sure our organization could continue in a meaningful way."

A group of 15 commented on the high cost of the APAP conference, and ways in which attending it was financially infeasible. Respondents described their circumstances in some

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6 "Onward" in Spanish.

7 Around 10 commented on the survey design; most offered supportive comments about the questions, such as: "This was a good survey and allowed me to reflect and understand and pinpoint a few of our shortfalls." Five offered constructive feedback on particular questions or its overall length. One found questions about Diversity, Equity and Inclusion to be "urban-centric," or irrelevant for rural communities that are "99% white."

detail, implying that they were not simply complaining, but want APAP to better understand the reasons why they could not attend. They shared their locations (one was from Alaska), budgets, and staff sizes; described cuts in travel funds or staffing; and/or itemized how much it costs the to get to NYC and attend. **A few valued the showcases, festivals and other programs surrounding the APAP conference and made suggestions for how APAP might meet their needs.** One described annually attending festivals such as Under the Radar and regional meetings, which aid in booking and promoting artists, but "I just CANNOT dream of affording [APAP] registration." Another wonders "if there was a way to pay a partial fee to maybe access showcases electronically or some creative means using technology .… I would challenge you to research that." Another strongly encourages APAP to offer reduced membership fees for SAMPs: "We desperately want to join, but we don't have the resources to pay membership fees AND attend the conference." Another offered a programming idea for APAP to "seriously consider [offering] a $10,000-and-under showcase. We need to get over this unwillingness to be straightforward regarding fees."

Given the high cost of the APAP conference, about a dozen compared or implied the role that regional conferences play for them. One needed general guidance on learning about other conferences that can help SAMPs "navigate being a better presenter. It's hard for us to afford the experience as is, let alone having to go to multiple [conferences] a year." Another pointed to the NPN Annual Meeting as a way to identify great artists in a manner that is not cost prohibitive. Six spoke of the **value of the AMW conference,** viewing it as a good alternative to APAP. One appreciated its format, including providing breaks and holding events at local cultural spaces and another felt it was more effective at building good relationships with agents due to its manageable schedule of both sessions and showcases. (Three mentioned either attending, or the closing of, PAE, but there were no patterns in their comments.)

Others reiterated, stressed, or explained their unique challenges, based on their region, type of organization, and/or other circumstances.

- **The most common theme was the desire to network, either by region, type of organization, or location.** One clear subset of comments came from colleges. An urban Midwestern college described how "university presenters have unique needs. We are both protected and hampered because we are nested in large bureaucracies." A rural college presenter stressed the distinction of raising funds within colleges in small towns as they are so prominent in town and local media. Another urban college presenter wants to interact with counterparts about "how to sustain relevance when there are so many other [presenters'] offerings close by." Another described scheduling challenges at colleges, which are not available midweek and can only consider residencies if they serve students. A civic organization would welcome the opportunity to talk to similar organizations with similar charters.
- Around six stated or reiterated (most with passion) that **efforts be made to engage agents and company managers around the unique needs of SAMPs, and how to make those relationships succeed.** One exclaimed a theme that was common among

comments: "I find myself repeatedly explaining to agents that there's no way I'm paying $20,000 for a solo recital in a hall with 250 seats; why waste both of our time?" (Others spoke of ancillary costs, such as travel and hospitality, or desire basic information about how to book and negotiate with "high tier" agents.) Another would find it helpful, and save time for agents as well as presenters, if the estimated booking fees were listed for artists, because "with having a limited budget, it's often difficult to know if an artist will be out of budget." Another, from a small community, was concerned about booking programming that is relevant to the audience: "I am more inclined to book with agents who take the time to get to know us and accept that when we say 'no' to an artist, it is rooted in strategy, thoughtfulness, and knowing what's best for our audience."

- Six spoke of **funding** in general, either describing the limitations of state arts agencies, or endorsing the idea of a SAMP fund. One wished that APAP would instigate dialogs with national funders and SAMPs. Another offered a strategy that matches the limited capacity of SAMPs: the NEA might earmark funding for rural or small presenters, with a simple application process: "What small organization has time to do the foundation fundraising cultivation or fill out an NEA Grant? Could there be easy, simple grants available for small organizations that are easily accessed? …This is a huge obstacle .... A little grant goes a long way in small places."

Feedback offered by one or a few included the following: Two wrote of being artistic ensembles that have begun to present artists. As one said, "We … backed into presenting. It is a really interesting sector that is growing rapidly." They value regional networks and/or conferences as a way to connect with artists they may want to present; one is working to connect artists from the Network of Ensemble Theaters with NEP. Other topics mentioned by one or two are: presenting international artists, mentorship among presenters, managing an all-volunteer staff, and coping with staff burnout and transition. *Note that these thoughts were only shared by one or two, so no conclusions can be drawn about their relevance to other respondents.*

In closing, one respondent offered a reflection on the theme of SAMPs being "small and mighty" that was woven throughout this study, in a manner that speaks to the importance of conducting and using the data collected:

> Our world is changing, and it seems that small and midsized presenters continue to reach more diverse and often larger segments of communities than large presenters with far less resources. We also have more flexibility to alter programming or take advantage of last-minute additions to programming when artists travel through their communities and reach out for opportunities. Small and mid-sized arts organizations are the mainstay in minority communities, and we are necessary for equity and inclusion.

Recommendations

The following recommendations were developed with APAP staff and Study Partners, with the consultant.

Any set of recommendations, even if preliminary, would be remiss without acknowledging the effects of COVID-19 on the presenting field. Like other presenters, it is assumed that SAMP leaders are living under a time of stress and uncertainty, including when or if their facilities will open in 2020, what life will be like when they do open, and how they will pay for artists, staff and maintenance. SAMPs are likely preparing scenarios that involve budget and staff cuts, while sheltering in place, and those on college campuses are likely waiting for budgets, directives and schedules to be handed down from administration. Yet study partners note that SAMPs, given their smaller size and their past history of weathering crises such as the 2008 economic downturn, may exhibit resilience and innovation in recovering from COVID-19.

Nonetheless, as a national service organization, APAP is emphasizing steps that might be taken over the next year or so.

1. Advocate for SAMPs' presence within the presenting field and their value to artists and audiences. This study has shown that SAMPs are located across the country, that 38% of respondents are in rural communities and that SAMPS may offer the only or first arts experiences that local residents have.

- Feature SAMPS in publications and in conference sessions.
- Feature SAMPS on social media.
  - Launch a SAMP Instagram campaign. A template of "SAMPs: Small and Mighty" could unify messaging around, and raise visibility for, this large portion of the presenting field.
  - Ask SAMPs to create informal, short videos of their surroundings, facilities, and programs, to be used in social media or edited and combined and shared with funders and in other ways.
- Monitor innovation and solutions that SAMPS are developing to present artists as their communities begin to reopen. At a time when the field cannot actively tour, and communities begin to open up, might SAMPs offer some of the solutions that connects artists to audiences? Might social distancing be easier in some rural and other locations that have more space? Might artists be able to avoid air travel and drive to SAMPs from surrounding states?

2. Convene cohort(s) of SAMPs, on a regional basis and/or during the APAP conference.
- Building peer connections among SAMPs could have far-reaching benefits for the field. Brainstorm possibilities for supporting SAMPS online given COVID-19, and because many SAMPs cannot attend conferences and showcases. Online formats could include regular meetings or focused conversations.

3. Offer ways for SAMPs to exchange ideas about artists they might book, either separately to collectively. Survey findings confirm that many SAMPs obtain information through personal referral and online sources, and that SAMPs are less able to travel and attend conferences.

- Virtual showcases might give SAMPs access to a range of artists that match their resources and capacity.
- Through a survey, compile referrals for SAMPs by asking questions such as:
    - Who are the topmost successful artists you have presented in the past 3 years?
    - What artists have worked well with your budget size?
    - What were ticket sales like?
- Eventually, consider holding a showcase for SAMPs featuring artists with fees of up to $10,000 or some other amount that is deemed affordable.
- Study partners wonder about the feasibility and interest in offering block booking that is structured regionally, sub-regionally, or in other ways that serve SAMPs.

4. Launch and facilitate a dialogue between agents and SAMPS about they can work together successfully. This report alluded to a longstanding question about developing relationships that both meet SAMPs' needs and support agents.[8] APAP could provide great service to the field by proactively addressing this question.

- Ask several agents to review this report and help design responses.
- Consult people who tested the survey and have played an active role in convening SAMPs, such as Gwethalyn Bonner, Joe Clifford, Lynn Creamer, and Wendy Hassan, for example.
- Create and share infographics that illustrate what the field needs to know about SAMPs possibly including:
    - Their average annual budget, and number of staff, as well as number of events and artists presented each year.
    - Basic questions to ask a SAMP before pitching an artist.
- Bring agents and presenters together through online discussions, presentations, and/or professional development sessions to consider solutions.

5. Design a funding initiative that includes SAMPs. Since the SAMP research began in 2018, APAP has considered the possibility of designing a funding program. Implementing the labor-intensive ideas that Wallace espouses in its publications is probably not feasible for most SAMPs due to their limited capacity. Particularly given COVID-19, consider answers to the following questions: How can we support innovation in the presenting field for presenters of all sizes? Is funding available to develop a SAMP cohort? Might funds go to capacity building or toward solving a problem that SAMPS identify? And, to what degree might SAMPs be nimble in their ability to innovate, because of their size, location or other factors? Is this the time to focus on a SAMP funding initiative or on a broader initiative that has a SAMP component?

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[8] This issue has come up in other presenter programs that the consultant has evaluated.

Appendices

Appendix A. Company Profile and Consultant Bios

Callahan Consulting for the Arts helps artists, arts organizations, and funders realize their vision through a range of services that includes strategic planning, resource development, evaluation, research, and philanthropic counsel. Founded by Suzanne Callahan in 1996, the firm has expanded to include strategic partnerships with senior consultants as well as freelance writer/administrators.

Based in Washington, D.C., and with a national presence, the firm has worked with a wide and growing client base of small to mid-sized arts ensembles, large institutions, presenting organizations, foundations, and national associations. With a long history of running funding programs, the firm manages the Dance/USA Fellowships to Artists (DFA) regrant initiative, and formerly managed Engaging Dance Audiences, as well as a component of the NEA's American Masterpieces program (also known as the National College Choreography Initiative), also for Dance/USA. Among its philanthropic clients have been the Doris Duke Charitable Foundation, Chicago Community Trust, Creative Capital and the Andrew W. Mellon Foundation.

In the past two decades, the firm has enjoyed growing recognition. Founder Suzanne Callahan is a regular trainer, college educator, panelist, and speaker. Her book *Singing Our Praises,* commissioned by the Association of Performing Arts Presenters, received a major national award. She has also been published in the areas of fundraising, planning, and philanthropy. The firm was approved to join the consultant rosters for the National Network of Consultants to Grantmakers (NNCG) and the Upper Manhattan Empowerment Zone (2005-present). The firm has conducted major studies of arts-related issues and dance communities in cities across the United States to inform funders' policy decisions. Studies for The Andrew W. Mellon Foundation and The Pew Charitable Trusts, as well as other funders, have involved extensive research on choreographic training, the arts field's use of technology, and dance communities across the country.

Callahan Consulting for the Arts offers its clients a wealth of experience in national policy and philanthropy; professional certification and documented success in fundraising; graduate-level training and trend-setting expertise in evaluation; and a thorough approach to assessment and strategic planning. Most importantly, the firm prides itself on its impressive track record of accomplishment and concrete results in its key service areas, and the strong and trusting relationships that it has developed with clients.

Suzanne Callahan, CFRE (Founder)

Callahan brings over 30 years' experience as a national funder, having served as Senior Specialist for the Dance Program at the National Endowment for the Arts and run national funding initiatives for Dance/USA. At the NEA she received a Distinguished Service Award for her leadership as Chair to the agency's AIDS Working Group and for her efforts to address the issues of AIDS and health insurance for artists. Callahan is an author and frequent lecturer in arts evaluation at national and regional conferences. Her book *Singing Our Praises: Case Studies in the Art of Evaluation*, published by the Association of Performing Arts Professionals, was awarded Outstanding Publication of the Year from the American Evaluation Association (AEA). She was appointed as Affiliate Researcher for the Center for Culturally Responsive Evaluation and Assessment (CREA). Her evaluation writings have been published in the *Chronicle of Philanthropy* as well as the journals of national arts service organizations. Most recently, two of her articles appeared in the Grantmakers in the Arts Reader. Evaluations conducted by her firm have focused on the creative process and audience engagement, as well as projects involving the

intersection of arts with social justice, service delivery, education, philanthropy, and healthcare. Callahan has served as panelist or site visitor for numerous foundations and associations and on advisory committees for the Arts and Humanities Council of Montgomery County, the Society for Arts in Healthcare and Dance Metro DC. A former dance teacher, Callahan holds an M.A. in Dance Education and a Certificate in Fundraising from George Washington University (GWU), where she also studied evaluation and anthropology, and a B.A. from Northwestern University. She has studied evaluation at The Evaluators Institute (TEI), the American Evaluation Association (AEA), the Center for Culturally Responsive Evaluation and Assessment (CREA), and directly with some of the foremost experts in the field, including Michael Quinn Patton and Richard Krueger. She trained in facilitating communities of practice with Etienne Wenger. She has been a guest lecturer at numerous universities and an adjunct professor at GWU. She conceived of and produced the Dance/USA book *Dance from the Campus to the Real World (and Back Again): A Resource Guide for Artists, Faculty and Students*. Both of her books are used as college texts.

Mikaela Hill, Client and Research Assistant

Hill is a graduate student in Arts Leadership and Cultural Management at Colorado State University. She interned at Colorado Ballet and OhioDance and has taught English to students in China and dance to students in Taiwan. She holds a BFA in dance, with a minor in Chinese, from Brigham Young University.

Justine A. Wayne, MSW, MSPH (Database Support)

Wayne works with nonprofits and has specialized in early childhood topics. She provides evaluation and data expertise to ensure program accountability and maximize available technology. After working as a toddler teacher at a child care center and a case manager for families of children with cancer, Wayne obtained a dual MSW and MSPH degrees, with an emphasis in maternal and child health. Based in North Carolina, she has worked in the Family Support Department and as a Special Projects Coordinator for T.E.A.C.H.(R) at Child Care Services Association. She now provides program evaluation, support, and monitoring for early childhood agencies and Smart Start local partnerships for children and youth in Caswell, Chatham, Guilford, Dare, Orange, and Wake Counties in North Carolina.

Appendix B. Methodology

Sampling Process and Limitations

With the study partners, the consultants constructed a sample based on the following criteria:

- Nonprofit presenting organizations
- Budgets of $50,000 - $2 million
- Annual artist fees of $25,000

In constructing the sampling frame, CCA drew from budget and other information provided by study partners, including APAP, five of the six regional arts organizations,[9] and three networks of presenters. They were:

Regional Arts Organizations

- Arts Midwest (IA, IL, IN, MI, MN, ND, OH, SD, WI)
- Mid Atlantic Arts Foundation (DC, DE, MD, NJ, NY, PA, VA, VI, WV)
- Mid-America Arts Alliance (AR, KS, MO, NE, OK, TX)
- South Arts (AL, FL, GA, KY, LA, MS, NC, SC, TN)
- Western States Arts Federation (AK, AZ, CA, CO, HI, ID, MT, NM, NV, OR, UT, WA, WY)

Networks

- Arts Presenters of Northern New England (APNNE)
- New England Presenters (NEP) (CT, MA, ME, NH, RI, VT)
- North Carolina Presenters Consortium (NCPC)

Study partners, to the best of their ability, provided custom lists of presenters within their regions that met the above criteria, based on their existing data and knowledge. APAP provided the largest set of organizations and contacts. Contact information was provided to CCA as an outside researcher, for one-time use, for the purposes of this study only, with the understanding that identities would be kept confidential.

A challenge in creating the frame was not being able to confidently prequalify respondents for inclusion, due to the lack of consistent, reliable budget figures. Because service organizations' financial data are reported in different ways and serves different purposes, there was no single, consistent source of this information. Contact lists included members, conference attendees, colleagues, or a combination of them. In addition, several study partners wondered if some of the

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[9] Due to its privacy policies, New England Foundation for the Arts opted not to participate in the study by sharing presenters' contact information, and referred APAP to the two presenter networks in its region. Without having a larger, comparable sample from this RAO, representativeness cannot be assessed and the region may be underrepresented within the study.

budget information might be underreported, since those figures were used to calculate membership and registration fees.

Given this challenge, CCA matched the organizations in the sampling frame to two other data sources to obtain a proxy for annual budget size: 1) the National Center for Charitable Statistics Core File, which provides annual budget figures for many nonprofits, and 2) a data set from National Assembly of State Arts Agencies (NASAA) of organizations that received general operating grants from any state arts agency in 2018, as those grant records provided operating budgets from that year. Records were matched by EIN, DUNS number, and/or organization name. The matching process provided budgetary information for 778 records that otherwise would have been missing altogether. Organizations were only included in the frame if the consultants had information to assess the above criteria, including budget size.

Nonetheless, missing budget information continues to be a weakness of the data set and, we believe, the field's knowledge base overall. Therefore, it was not possible, at this time, to get a full impression of the number of SAMPs in the country, based on budget size. (However, refer to the Representativeness section below, which provides some indication of the final data's generalizability.) In addition, several of the RAOs and advisors shared another methodological dilemma: that depending on the presenter's location, including region as well as whether they were in an urban or rural setting, the budget cap of $2 million might indicate a large organization, rather than a small or midsized one.

The initial lists contained a total of 3,560 entries. As expected, these lists contained numerous duplicates of individuals who were associated with APAP as well as other study partners. In addition, lists contained multiple staff people for the same organization (315 people for 150 organizations). Eventually a total of 2,102 names were selected, representing 1,988 organizations.

Incentives

APAP and two RAOs generously offered incentives that are believed to have been key in motivating people to respond. APAP provided raffles for six free 2021 conference registrations, one for each region. Arts Midwest and Western Arts Alliance also offered raffles for one free 2021 conference registration each. It was clear from the high number of people (88% or 361) who chose to enter one or more of the raffles that it was a strong motivator. In addition, a SAMP hat was created and offered as a gift to all respondents and 186 accepted it. Importantly, several days before it was deployed, and during recruitment, the RAOS reached out to their contacts to introduce the survey and encourage people to complete it.

Deployment

The survey was deployed on October 8, 2019, through the survey platform. Reminder invitations were sent within the platform on October 24, 2019, and November 1, 2019. Because only one response per organization was allowed, multiple contacts within the same organization were sent a courtesy email to tell them who, within their organizations, were being contacted and encourage them to decide who should complete the survey. Because a larger number of invitations remained unopened, CCA took a number of steps to ensure that the survey reached

respondents. The survey invitation was redeployed through an email merge outside of the survey platform, to bypass respondents' firewalls. These email invitations were sent three times, on November 6, November 25, and December 2, 2019. Toward the end of the time period a postcard was mailed to 1,569 non-respondents (including those who had opted out of the survey platform and whose emails had bounced) to reach those who could not be contacted via email.

Final Qualification

At the beginning of the survey, to ensure that respondents were fully qualified for the study, they were asked to provide their organization type, budget range, and artist fees paid. That process disqualified 188, with results as follows:

Disqualified Respondents	Number
Organization Type	
Nonprofits that do not present artists	24
Commercial Organizations	16
Budget Size	
Under $50,000	39
Over $2 million	68
Annual Artist Fees	
Under $25,000	38
Total	**185**

The high number of disqualified respondents, particularly on budget size, supports the notion that the budget information available to study partners was sometimes limited. This early finding underscores the need for the SAMP study to provide a data set of budget information about the SAMPs that is up to date and reliable.

In addition, CCA made a methodological choice to better serve the study partners and their constituents. The qualification criteria were revealed within the survey invitation, so that presenters would know if they did, or did not, match these criteria. Though this choice may have lowered the response rate, it helped prospective respondents—who are also the study partners' respected members and valued constituents—avoid the survey fatigue and disappointment of beginning a survey that promised appealing incentives, only to find out that they were eliminated from participating in it. It is surmised that some prospective respondents disqualified themselves, on the basis of the invitation language.

Ethics, Privacy and Sharing

As mentioned above, respondents were informed that their contact information and survey responses were provided to CCA as an outside researcher and that their identities would be kept confidential. At the end of the survey, respondents were asked if they wished to be kept informed of APAP's SAMP programs and services as they develop, and 347 opted to do so (21 declined and 42 left this question blank). From these 347 presenters, 131 came from the regional lists rather than APAP's own contact information.
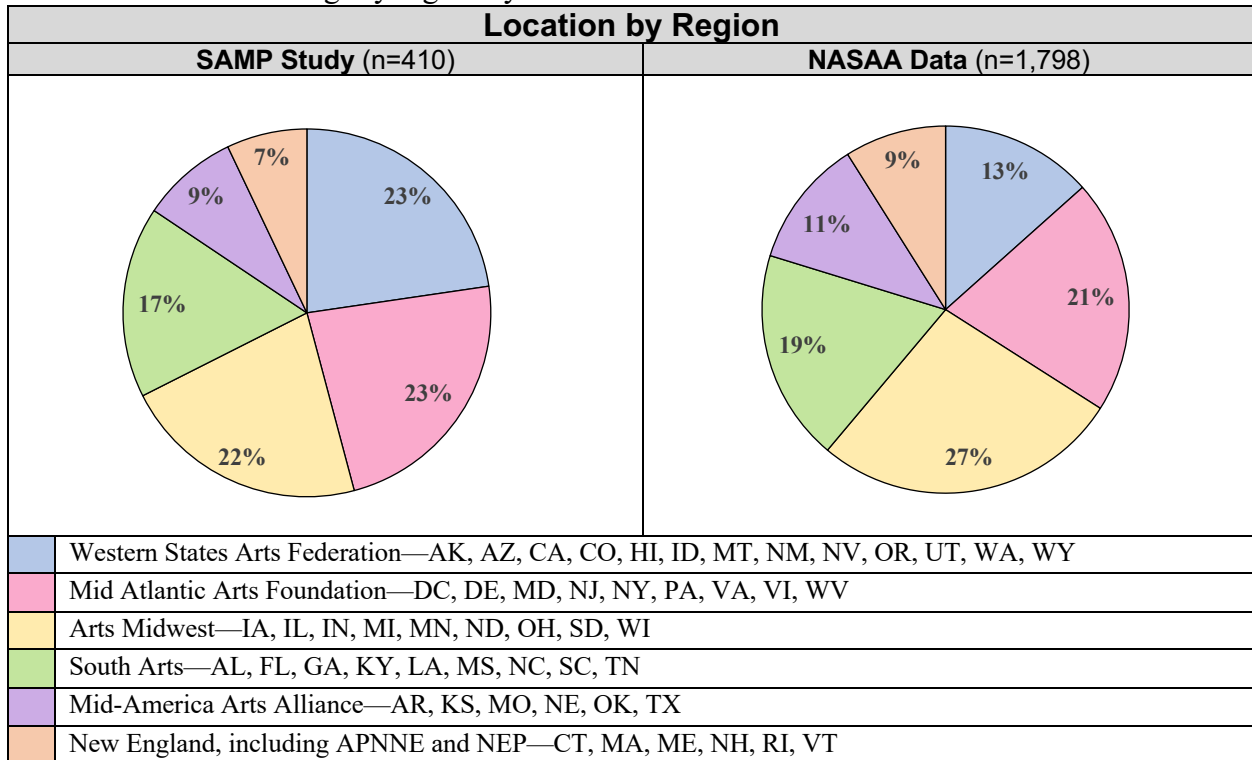
Representativeness

Assessing representativeness was a challenge, due to the lack of comparable data sets. To aid in assessing it, the National Assembly of State Arts Agencies (NASAA) kindly provided an annual list of its FY 2018 grants made by state arts agencies that were determined to be a reasonable proxy for both budget and regions of presenting organizations in the United States (n=5,408). Data were extracted for NASAA's Activity Type of 11, which corresponds to general operating grants and which contained annual budget figures, and for the following Organization Types:

|	
Cultural Series Organization	Arts Service Organization
Arts Council/Agency	Art Museum
Arts Center	College/University
Performance Facility	Community Svc Org
Fair/Festival	Humanities Council
Other Museum	Social Svc Org

The result was a list of 1,798 organizations.

Region. The comparison of regions is below. The regional breakdown of the SAMP data is similar to the NASAA data, with two exceptions: The Western states are lower by 10% and the Midwestern states are slightly higher by 5%.

Location by Region

SAMP Study (n=410) — Western 23%, Mid Atlantic 23%, Arts Midwest 22%, South Arts 17%, Mid-America 9%, New England 7%

NASAA Data (n=1,798) — Western 13%, Mid Atlantic 21%, Arts Midwest 27%, South Arts 19%, Mid-America 11%, New England 9%

	Western States Arts Federation—AK, AZ, CA, CO, HI, ID, MT, NM, NV, OR, UT, WA, WY
	Mid Atlantic Arts Foundation—DC, DE, MD, NJ, NY, PA, VA, VI, WV
	Arts Midwest—IA, IL, IN, MI, MN, ND, OH, SD, WI
	South Arts—AL, FL, GA, KY, LA, MS, NC, SC, TN
	Mid-America Arts Alliance—AR, KS, MO, NE, OK, TX
	New England, including APNNE and NEP—CT, MA, ME, NH, RI, VT

Number of presenting organizations in budget range	SAMP Study	SAMP Study %	NASAA	NASAA %
Number by Region				
Midwest	91	22%	487	27%
Mid America	33	9%	203	11%
Mid Atlantic	95	23%	371	21%
New England	29	7%	161	9%
South	69	17%	335	19%
West	93	23%	241	13%
	410		**1,798**	

Budget. The NASAA data was filtered by annual budget size to the range that was allowed into this study, of $50,000-$2 million. This resulted in a list of 1,136 organizations. The median budget was $346,510, which matches the the median range for the SAMP data of $200,000-$499,000. Overall, the NASAA data displays a slightly lower budget distribution than the SAMP data, with 35% below $200,000, as compared to 24% in the SAMP data, and 16% above $1 million, as compared to 25% in the SAMP data.
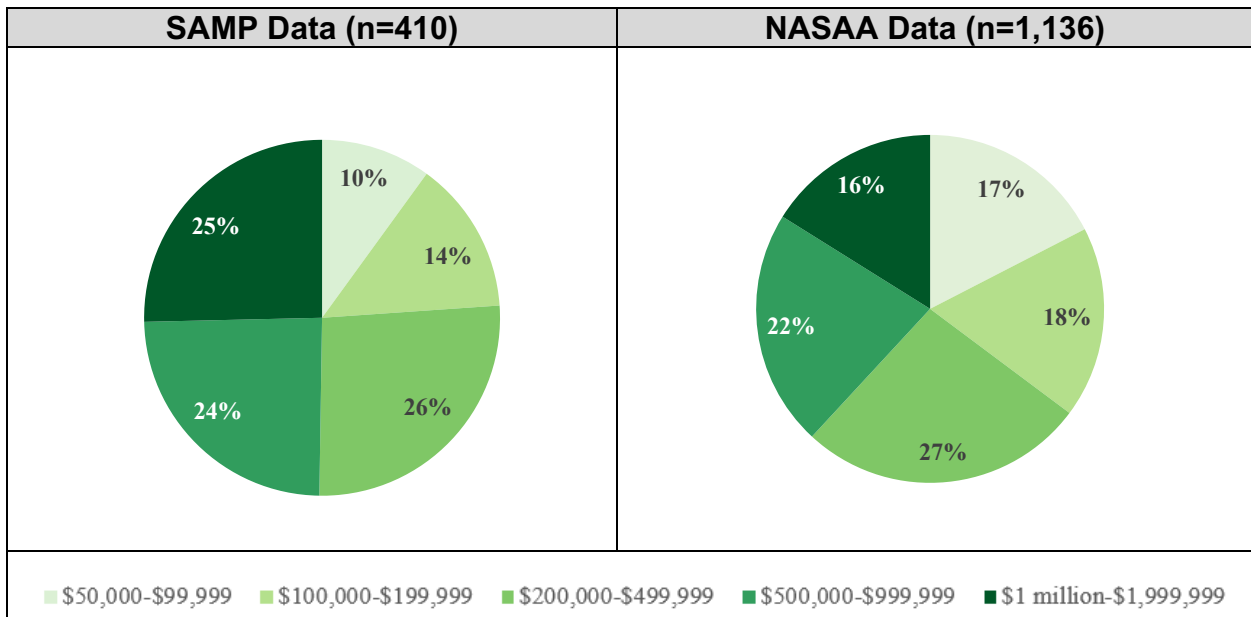
These two measures suggest that the data in the SAMP study is generally representative of the larger pool of small and midsized presenters in the U.S by region and budget. Regarding generalizability, the findings drawn from the data are distinct, meaning that there are few instances in which the findings are borderline, or where percentages are close.

The data from the National Center for Charitable Statistics (NCCS) was also considered; however, its codes for presenting activity appeared inconsistently assigned and potentially misleading, as some producing organizations, such as dance companies and theaters, had been coded as presenters. Therefore, it was not possible to extract a comparable sample.