Saint Louis Arts Ecology
February 8, 2019

PRESENTATION AT THE REGIONAL ARTS COMMISSION
ARTS &: NEXT STEPS CONVENING
FEBRUARY 8, 2019
Summary

The DeVos Institute of Arts Management at the University of Maryland was commissioned by Centene Corporation to study the arts ecology of St. Louis. The goal of the study was to provide guidance to Centene about the needs of the artists and arts organizations in St. Louis.

The study examined two cohorts of arts organizations, those larger organizations that receive RAC funding and smaller organizations that receive project support. In-depth interviews and data surveys were performed with 60 organizations from both cohorts.

Data for arts organizations in St. Louis were also compared to data from arts organizations in six comparator cities.

The interviews focused on key strategic aspects of arts management: artistic planning, marketing (both to increase ticket sales and to engage new donors), fund-raising, board engagement and staffing.
Major Conclusions

Major conclusions of the study included:

- St. Louis has a remarkably large, diverse and productive arts sector that includes a large number of organizations
- The largest arts organizations are larger than their counterparts in similar size cities
- St. Louis is missing a cadre of mid-sized organizations; most organizations are very large or of modest size
- There is a great reliance on fundraising by the larger arts institutions
Major Conclusions (cont)

- A small group of very generous funders is providing a large portion of philanthropy in St. Louis

- Almost half the citizens of St. Louis are African American and often there are no organizations of color with budgets exceeding $1 million

- Newer organizations have a challenge breaking into the major funders

- Artistic planning is relatively short term; this hampers ability to create larger scale projects, to raise large gifts and to attract major press interest

- Marketing expenditures are low; this makes building earned and contributed income far more difficult
Major Conclusions (cont)

- There is a very limited pool of trained arts managers and it isn’t easy getting new staff to move to St. Louis
- Ticket prices are relatively modest and much is available for free
- Boards are not as engaged in fundraising as necessary
- Most organizations have limited national visibility
- Traditionally every organization received RAC funding; this has changed
- Arts education is needed yet coordination with the school system is limited
Major Conclusions (cont)

Many of these factors should guide major funders as they plan their arts philanthropy.

Ideally, a group of funders could work together to address the major issues.
This Study Addresses the Arts Ecology of Saint Louis

- Saint Louis has a vibrant and distinguished arts ecology
- Several organizations have achieved national and international renown
- Important artists collaborate with the major institutions in St. Louis
- But challenges remain. A few very large organizations dominate the landscape, there are no large organizations of color, there are a large number of organizations competing for limited resources, and arts education and arts management education are limited
- This plan evaluates the current arts ecology and suggests approaches for addressing major concerns
Saint Louis City’s Population Has Declined Since the 1950’s

Saint Louis City Population
Source: U.S. Census
Saint Louis City’s Ethnic Diversity Differs Significantly From its Metro Area and Missouri

Source: U.S. Census 2012-2016 American Community Survey 5-year estimates
Shifting Corporate Landscape

- Hardee’s moves to Nashville
- Express Scripts purchased by Cigna
- Monsanto purchased by Bayer
- Panera Breads purchased by JAB Holidng Co. (Caribou Coffee/Krispy Kreme)

![Graph showing Public companies based in metro St. Louis](source: Post Dispatch archives)
The Over-Arching Arts Ecology is Changing

- Reduction in arts education in the public schools
- Decrease in subscriptions
- Role of electronic substitutes
- Shrinking of the recording industry
- Aging of donor base
- Role of electronic distribution of the arts (71% of adults get arts on the internet, 51% attend a live event each year)
# Saint Louis NFP Arts Organizations

## Art Museums/Visual Arts
- Saint Louis Art Museum
- Contemporary Art Museum
- St Louis Art Fair
- The Luminary
- St. Louis Artists' Guild
- International Photography Hall of Fame and Museum
- Art Saint Louis
- Critical Mass for the Visual Arts
- Florissant Fine Arts Council

## Arts Education/Multi-disciplinary
- COCA
- Springboard to Learning
- St Louis ArtWorks - Youth Outreach
- Atrek Education Corp.
- Freedom Arts and Education Center
- Urban Artist Alliance for Child Development
- Suzuki Harmony STL
- YourWords STL

## Dance
- Dance STL
- St Louis Ballet
- Dances of India
- MADCO Modern American
- Dance Company
- Karlovsky & Company Dance
- OhmKaram
- Sangeetha
- Soorya Performing Arts

## Film/Media/Public Broadcast
- Cinema St Louis
- Radio Arts Foundation
- KDHX Community Media
- HEC TV
- Italian Film Festival of St. Louis
- Continuity
- Sonic Stories

## Arts District
- Grand Arts Center District

## Circus
- Circus Flora
- Circus Harmony

## Craft and Decorative Arts/Folk Arts
- Craft Alliance Center of Art + Design
- PlowSharing
- St. Louis Story Stitchers

## Literary
- December Publishing
## Saint Louis NFP Arts Organizations

### Museum
- Missouri Historical Society & Museum
- The Magic House St. Louis Children's Museum
- Saint Louis Science Center
- World Chess Hall of Fame
- The National Museum of Transportation
- National Blues Museum
- Museum of the Dog
- Campbell House Museum
- The Frank Lloyd Wright House in Ebsworth Park
- The Griot Museum of Black History

### Music
- Saint Louis Symphony
- Cathedral Concerts
- Compton Heights Concert Band
- Jazz Saint Louis
- The St Louis Children's Choirs
- The Bach Society of St Louis
- Chamber Music Society St. Louis
- Chamber Project St. Louis
- American Chamber Chorale
- CHARIS Women’s Choir
- Women’s Hope Chorale of St. Louis
- St. Louis Civic Orchestra
- St. Louis Low Brass Collective
- Saint Louis Classical Guitar Society
- Saint Louis Chamber Chorus
- Gateway Men’s Chorus
- Gateway Festival Orchestra of St. Louis
- New Music Circle
- Old Webster Jazz & Blues Festival
- The Jazz Edge
- Town and Country Symphony Orchestra
- Twangfest
- University City Symphony Orchestra

### Opera
- Opera Theater of St. Louis
- Winter Opera Saint Louis
- Union Avenue Opera

### Park / Gardens / Zoo
- Missouri Botanical Gardens
- Laumeier Sculpture Park
- Saint Louis Zoo

### Performing Arts Centers / Arts Centers
- The Sheldon Concert Hall & Arts Galleries
- Kranzberg Arts Foundation
- Intersect Arts Center
- Lemp Neighborhood Arts Center
# Saint Louis NFP Arts Organizations

<table>
<thead>
<tr>
<th><strong>Theater</strong></th>
<th><strong>Arts Social Services</strong></th>
<th><strong>Other</strong></th>
</tr>
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<tr>
<td>The Black Rep</td>
<td>Pianos for People</td>
<td>Saint Louis Fashion Fund</td>
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<tr>
<td>The MUNY</td>
<td>Prison Performing Arts</td>
<td>St. Louis African Arts Festival</td>
</tr>
<tr>
<td>The Rep/ Repertory Theater St. Louis</td>
<td>Artscope</td>
<td></td>
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<tr>
<td>Stages Saint Louis</td>
<td>Urban Artist Alliance for Child Development</td>
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<tr>
<td>Shakespeare Festival St. Louis</td>
<td>South Broadway Art Project</td>
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<tr>
<td>St. Louis Shakespeare</td>
<td>Gitana Productions</td>
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<tr>
<td>Metro Theater Company</td>
<td>Arts and Faith St. Louis</td>
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<tr>
<td>Stray Dog Theatre</td>
<td>Civic Arts Company</td>
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<tr>
<td>St. Louis Fringe Festival</td>
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<tr>
<td>Upstream Theater</td>
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<td>Tennessee Williams Festival St. Louis</td>
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<tr>
<td>Insight Theatre Company</td>
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<td>New Jewish Theatre</td>
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<tr>
<td>Kinetic Tapestry Physical Theatre</td>
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<tr>
<td>Max &amp; Louie Productions</td>
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<tr>
<td>Slightly Askew Theatre Ensemble</td>
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<tr>
<td>St. Louis Actors Studio</td>
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<tr>
<td>The Tesseract Theatre Company</td>
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Saint Louis - Largest NFP Arts and Heritage Organizations

Saint Louis Largest NFP Arts and Heritage Orgs
*Source: IRS 990's expense FY16, FY15; **FY17 Financial Statements
## Major Local Foundations

<table>
<thead>
<tr>
<th>Grantmaker Name</th>
<th>City</th>
<th>Total Assets</th>
<th>Total Giving</th>
</tr>
</thead>
<tbody>
<tr>
<td>Greater Saint Louis Community Foundation</td>
<td>St. Louis</td>
<td>$303,411,900</td>
<td>$62,696,759</td>
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<tr>
<td>St. Louis Community Foundation, Inc.</td>
<td>St. Louis</td>
<td>$226,242,476</td>
<td>$52,900,170</td>
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<tr>
<td>Emerson Charitable Trust</td>
<td>St. Louis</td>
<td>$17,206,701</td>
<td>$28,893,482</td>
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<tr>
<td>Monsanto Fund</td>
<td>St. Louis</td>
<td>$25,037,995</td>
<td>$21,911,738</td>
</tr>
<tr>
<td>The Centene Charitable Foundation</td>
<td>St. Louis</td>
<td>$222,431</td>
<td>$17,227,444</td>
</tr>
<tr>
<td>The Crawford Taylor Foundation</td>
<td>Clayton</td>
<td>$588,260,657</td>
<td>$13,987,910</td>
</tr>
<tr>
<td>Peabody Energy Corporation Contributions Program</td>
<td>St. Louis</td>
<td>-</td>
<td>$9,548,000</td>
</tr>
<tr>
<td>Steward Family Foundation</td>
<td>St. Louis</td>
<td>$8,085,606</td>
<td>$8,303,315</td>
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<tr>
<td>The JSM Charitable Trust</td>
<td>St. Louis</td>
<td>$1,018</td>
<td>$7,947,322</td>
</tr>
<tr>
<td>The Edward D. Jones &amp; Co. Foundation</td>
<td>St. Louis</td>
<td>$23,554,668</td>
<td>$6,744,117</td>
</tr>
<tr>
<td>World Wide Technology Foundation</td>
<td>St. Louis</td>
<td>$9,425,388</td>
<td>$4,760,765</td>
</tr>
<tr>
<td>August A. Busch III Charitable Trust</td>
<td>Clayton</td>
<td>$2,749,364</td>
<td>$4,499,252</td>
</tr>
<tr>
<td>Regional Cultural &amp; Performing Arts Development Commission</td>
<td>St. Louis</td>
<td>$6,026,157</td>
<td>$4,226,509</td>
</tr>
<tr>
<td>Ameren Missouri</td>
<td>St. Louis</td>
<td>$3,985,390</td>
<td>$3,993,474</td>
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<tr>
<td>The Bellwether Foundation, Inc.</td>
<td>St. Louis</td>
<td>$74,969,430</td>
<td>$3,854,100</td>
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<tr>
<td>The Kranzberg Family Charitable Foundation</td>
<td>St. Louis</td>
<td>$15,517,792</td>
<td>$3,760,500</td>
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<tr>
<td>Fox Family Foundation</td>
<td>St. Louis</td>
<td>$18,747,584</td>
<td>$3,564,860</td>
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<tr>
<td>Julian I. &amp; Hope R. Edison Foundation, Inc.</td>
<td>St. Louis</td>
<td>$21,224,743</td>
<td>$2,905,035</td>
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<tr>
<td>The Stephen F. and Camilla T. Brauer Charitable Trust</td>
<td>Chesterfield</td>
<td>$557,090</td>
<td>$2,679,750</td>
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<tr>
<td>Hauck Charitable Foundation</td>
<td>St. Louis</td>
<td>$36,345,397</td>
<td>$2,163,290</td>
</tr>
</tbody>
</table>

*Source: Foundation Center - by Total giving - with Arts and Culture Giving*
We Looked at Cities Similar in Population Size to Saint Louis City

- Corpus Christi City, Texas
- Riverside City, California
- Lexington-Fayette Urban County, Kentucky
- Stockton City, California
- Pittsburgh city, Pennsylvania
- St. Paul City, Minnesota
St Louis’s Top 10 Arts Organizations are Large Compared to Similar Sized Cities

<table>
<thead>
<tr>
<th>City</th>
<th>Low End - Top 10 Arts Organizations</th>
<th>High End - Top Ten Arts Organizations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Corpus Christi city, Texas</td>
<td>$48,546</td>
<td>$4,056,680</td>
</tr>
<tr>
<td>Riverside city, California</td>
<td>$104,175</td>
<td>$1,187,207</td>
</tr>
<tr>
<td>Lexington-Fayette urban county, Kentucky</td>
<td>$270,738</td>
<td>$1,759,870</td>
</tr>
<tr>
<td>St. Louis city, Missouri</td>
<td>$6,244,269</td>
<td>$61,274,245</td>
</tr>
<tr>
<td>Stockton city, California</td>
<td>$21,187</td>
<td>$1,402,002</td>
</tr>
<tr>
<td>Pittsburgh city, Pennsylvania</td>
<td>$3,077,962</td>
<td>$58,209,392</td>
</tr>
<tr>
<td>St. Paul city, Minnesota</td>
<td>$1,157,789</td>
<td>$18,603,600</td>
</tr>
</tbody>
</table>

Source: IRS 990’s FY16 expenses
We Looked at Six MSA’s Similar in Size to Saint Louis

Minneapolis-St. Paul-Bloomington, MN-WI Metro Area
Tampa-St. Petersburg-Clearwater, FL Metro Area
Denver-Aurora-Lakewood, CO Metro Area
Baltimore-Columbia-Towson, MD Metro Area
Charlotte-Concord-Gastonia, NC-SC Metro Area
Orlando-Kissimmee-Sanford, FL Metro Area
St Louis’s Top 10 Arts Organizations are Large Compared to Similar Sized MSAs

<table>
<thead>
<tr>
<th>MSA</th>
<th>Low End</th>
<th>High End</th>
</tr>
</thead>
<tbody>
<tr>
<td>Minneapolis-St. Paul-Bloomington, MN-WI Metro Area</td>
<td>$6,760,707.00</td>
<td>$39,178,897.00</td>
</tr>
<tr>
<td>Tampa-St. Petersburg-Clearwater, FL Metro Area</td>
<td>$1,053,289.00</td>
<td>$36,575,612.00</td>
</tr>
<tr>
<td>Denver-Aurora-Lakewood, CO Metro Area</td>
<td>$3,076,794.00</td>
<td>$63,128,120.00</td>
</tr>
<tr>
<td>St. Louis, MO-IL Metro Area</td>
<td>$6,244,269.00</td>
<td>$61,274,245.00</td>
</tr>
<tr>
<td>Baltimore-Columbia-Towson, MD Metro Area</td>
<td>$1,674,333.00</td>
<td>$30,598,899.00</td>
</tr>
<tr>
<td>Charlotte-Concord-Gastonia, NC-SC Metro Area</td>
<td>$1,857,194.00</td>
<td>$33,939,705.00</td>
</tr>
<tr>
<td>Orlando-Kissimmee-Sanford, FL Metro Area</td>
<td>$940,531.00</td>
<td>$26,746,192.00</td>
</tr>
</tbody>
</table>

Source: IRS 990’s FY16 expenses
While Almost Half of the Citizens in Saint Louis City Are African American...
There Are Very Few African American Arts Organizations or Institutions

- “We have 47% African American population, and only ONE African American arts institution with a budget over $500,000”
- According to one study respondent, the African American culture exists in Saint Louis, but is vastly under-resourced and exists outside of institutionalized cultural organizations. Instead it exists through grassroots organizations, individual artist networks, and non-arts entities such as churches or community centers.

<table>
<thead>
<tr>
<th>Organization</th>
<th>Expenses</th>
</tr>
</thead>
<tbody>
<tr>
<td>The Black Rep</td>
<td>$533,971</td>
</tr>
<tr>
<td>Songs of Africa (African Musical Arts)</td>
<td>$242,000</td>
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<tr>
<td>The African Heritage Association of St Louis Inc.</td>
<td>$87,103</td>
</tr>
<tr>
<td>African American Experience Museum Inc.</td>
<td>No information available</td>
</tr>
<tr>
<td>The Griot</td>
<td>No information available</td>
</tr>
</tbody>
</table>

Source: IRS 990's FY16
Arts Leaders Interviews: Phase 1

Methodology:

- A request to participate was sent to list of RAC grantees provided by Felicia Shaw, Executive Director of the Regional Arts Commission, for the first round of interviews.
- Additional arts leaders outside of the grantee pool were also contacted.
- 28 interviews were conducted, 30-60 minutes in duration.
- Questions were both quantitative and qualitative regarding their own organizations, and opinions regarding the arts ecology of Saint Louis.
- Interviewees were informed that only aggregate information without identifiers would be brought forward for the study.
## Study Participants - Phase 1

<table>
<thead>
<tr>
<th>Bach Society of Saint Louis</th>
<th>MADCO (Modern American Dance Company)</th>
<th>Saint Louis Classical Guitar Society</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cinema St. Louis</td>
<td>Missouri Historical Society</td>
<td>Saint Louis Dance Theatre DBA The Big Muddy Dance Co</td>
</tr>
<tr>
<td>Circus Harmony</td>
<td>Opera Theatre of Saint Louis</td>
<td>Saint Louis Symphony Orchestra</td>
</tr>
<tr>
<td>COCA-Center of Creative Arts</td>
<td>Radio Arts Foundation</td>
<td>Sheldon Arts Foundation</td>
</tr>
<tr>
<td>Contemporary Art Museum St. Louis</td>
<td>Regional Arts Commission Saint Louis</td>
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<tr>
<td>Jazz Saint Louis</td>
<td>Saint Louis Ballet Company</td>
<td></td>
</tr>
<tr>
<td>Laumeier Sculpture Park &amp; Museum</td>
<td>Saint Louis Children's Choirs</td>
<td></td>
</tr>
</tbody>
</table>
Artistic Planning

- Relatively short span for Artistic Planning
- Many respondents noted it had gotten better, but would like it to be longer

ARTISTIC PLANNING - HOW MANY YEARS OUT? N=26
SOURCE: INTERVIEWS

- <1 year 8%
- 1 year 50%
- 2 years 29%
- 3 or more years 13%
Marketing

- Study respondents stated that very little spent is on marketing – both in terms of the % of budget spent on marketing, and in the respondents perception (they often say “very little” and “not enough”).
- Many organizations are using social media, not just because of using a digital strategy, but simply because they can’t afford paid advertising.
- There is a strong importance in Saint Louis on partnerships with Public Radio, and coverage in print media in articles and reviews.
- There is little adoption of technology or digital interventions (aside from Social Media/Digital Ads).
- Few organizations pursue organized institutional marketing campaigns.
Main Programmatic Marketing Tactics

- Respondents said the use of Social Media was often about low/no cost as much as a tactical choice.
- Many respondents the importance of involvement of Public Radio in town to help promote their organizations
Attendance Trends Over Last 3-5 Years

Has Attendance Been Up/Steady/Down over last 3-5 years? n=25

Source: Interviews. # of Organizations
Most Organizations Are Highly Dependent On Contributed Revenue

Contributed Revenue as % of Total Revenue n=24
Source: Interviews. Blank = no information provided

- 3 respondents – information not provided
With a Few Exceptions, the Size of Largest Individual Gifts Received is Modest

"We sat down and realized – we have lost the audience members who give us [a certain amount] – they have died or moved out of town. So why we’ve ended up with deficits – we were counting on the gifts coming in from key givers. New donors are not coming up with that kind of money. We have more donors, but not with larger gifts.”
Board Giving Requirements Are Modest

Mandatory Give /Get Board Giving
n=27

- yes: 78%
- no: 22%

Give / Get Minimums n=18

- $2,000
- $4,000
- $6,000
- $8,000
- $10,000
- $12,000
- $14,000
Most Board Gifts Are Small

Range of Board Gifts

$500K

$400K

$300,000

$250,000

$200,000

$150,000

$100,000

$50,000
Financial Performance is Mixed Amongst Respondents

Operating Budget Financial Position for Last 3-5 Years n=27

Source: Interviews - # of organizations
Audience Challenges in Saint Louis

- Too much going on in the city for the size of the population. The arts infrastructure in place is to support the higher population, which is now gone.
- There is a high quality of arts and culture offerings, but a perception that the local audience doesn’t understand just how good it is.
- On the other hand, SL citizens have civic pride and feel the ‘need’ to have arts and culture offerings (but they may not go)
- There is a lack of data on attendance and audience in general.
Audience Challenges in Saint Louis – Cont’d

- Lack of racial diversity in audiences, with exceptions in specific areas of programming (i.e. concerts geared to an African American audience, youth outreach)
- “Levels of educational achievement in SL are not high. Arts consumer is generally more educated than the average American. This won’t change. This becomes a challenge in SL”
- Impression that because there is so much for free in SL, it also means people may not value the offerings.
The “First Ones In” Handshake Deal

- Organizations formed in the past when Saint Louis was booming benefited from strong corporate support to become established, create endowments – these organizations are stable. But newer organizations do not have the benefit of that early start. There is a sense that if you were not ‘at the table’ at this point in history, there is no support for your organization.

- The Zoo Museum District’s specific tax levy mandated by the city: These organizations not only have guaranteed funding, but are also generally free of charge, thus giving further competition to organizations that need to charge admission.
Small Number of Funders, Large Number of Arts Organizations

- Too many arts organizations accessing the same pool of funding. Funders will just spread the pie thinner to all that ask.
- “There are a SMALL handful of arts funders that are subsidizing lots of organizations. Without those funders, the arts sector is FRAGILE. This distorts the reality of the needs to run an arts organization.”
- Would be helpful if funders were more consistent in their funding from year to year. Current dollars/support is fragmented and inconsistent.
- There is a perception that the majority of the resources are going to the largest institutions only.
- “There are virtually NO private foundations in SL that grant to the community. We benchmark against Cleveland, Minneapolis, Kansas City – THEY have really large private foundations with large gifting.”
Staff and Board Challenges

- Staff – finding and keeping good staff is a challenge. Salaries are not competitive, and when local talent is not available it is difficult to get people to move to SL for a job.
- “We need stronger board members – they are strong, but we are not renewing the talent for our boards.” It’s often the same people sitting on all the boards.
Lack of Arts Education

“When other cities were gaining awareness about arts education in schools, SL did NOT. It’s very immature in that sense. A lot of arts organizations do outreach intending to sell tickets for their existing programs. They are really just selling their existing programs, it’s not true arts education.”
Summary Observations

- St. Louis has a remarkably large, diverse and productive arts sector
- The largest arts organizations are larger than their counterparts in similar size cities
- St. Louis is missing a cadre of mid-sized organizations
- There is a great reliance on fundraising by the larger arts institutions
- A small group of very generous funders is providing a large portion of philanthropy
- Almost half the citizens are African American and there are no organizations of color with budgets exceeding $1 million
- Newer organizations have a challenge breaking into the major funders
- Marketing expenditures are low
Summary Observations

- There is a very limited pool of trained arts managers and it isn’t easy getting staff to move to St. Louis
- Ticket prices are relatively modest and much is available for free
- Boards are not as engaged in fundraising as necessary
- Limited national visibility
- Everyone was funded – even very small organizations
- Arts education is needed and coordination with the school system is limited
Summary Observations

- Disorganized efforts with public school system
- Strong need for arts management training for staff and board
- Not as much collaboration amongst arts organizations as is possible/desirable
- Modest government involvement
- Strong desire to be as visible as the Cardinals
Arts Leaders Interviews - Phase 2

Methodology:

- For the 2nd Round - an additional list of groups and organizations was targeted via a list provided by Felicia Shaw, Executive Director of the Regional Arts Commission.
- In many cases these are smaller arts organizations, or non-arts institutions with arts projects funded by RAC.
- 32 interviews were conducted by DVIAM, and were 20-30 minutes in duration.
- Questions were both quantitative and qualitative regarding their own organizations, and opinions regarding the arts ecology of Saint Louis
- Interviewees were informed that only aggregate information without identifiers would be brought forward for the study.
### Study Interviews - Phase 2

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<td>Artscope</td>
<td>Gitana Productions</td>
<td>St Louis Low Brass Collective</td>
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<td>Atrek Education Corp.</td>
<td>International Institute of St Louis</td>
<td>St Louis Story Stitchers Artist Collective</td>
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<td>Chamber Music Society St. Louis</td>
<td>Kingdom House</td>
<td>Tennessee Williams Festival St. Louis</td>
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<td>CHARIS</td>
<td>Midwest Artist Project Services</td>
<td>The Black Rep</td>
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<td>Continuity</td>
<td>Perennial</td>
<td>The Magic House St Louis</td>
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<td>Cultural Festivals</td>
<td>Pianos for People</td>
<td>Upstream Theater</td>
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<td>Dances of India</td>
<td>Prison Performing Arts</td>
<td>Urban Artist Alliance for Child Development</td>
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<tr>
<td>Deaf Empowerment Awareness Foundation</td>
<td>Saint Louis Fashion</td>
<td></td>
</tr>
</tbody>
</table>

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With a Few Exceptions, Donations Are Small

Range in Size of Donations

Source: Interviews
Most Receive Small Gifts from Board Members

MANDATORY BOARD GIVE/GET? (N=32)
- Yes: 47%
- No: 50%
- N/A: 3%

Minimum Board Donation Requirement (n=15) (If there is Mandatory Give/Get)
- $0
- $1,000
- $2,000
- $3,000
- $4,000
- $5,000
- $6,000
The Concerns of This Cohort Are Similar to Those of the Larger Organizations

- Major Areas of Concern:
  - Access to Funding
  - Inequity of Funding
  - Staff Challenges
  - Board Challenges
  - Geographic and Racial Segregation
  - Political/Government Challenges
  - Lack of Collaboration
  - Audience Engagement
  - Lack of Press Coverage
- Note from the Interviewers - quite a number of this cohort did not have knowledge or familiarity with their financials, even if they were the E.D.’s or Board President
Conclusions

- Saint Louis has a long and distinguished history in the arts
- There is a need for addressing many substantial concerns about the current arts ecology:
  - The need for more equity
  - The need for growth of organizations of color
  - The need for investment in mid-sized organizations
  - The need for capacity building
  - The need for more arts education
- It would be ideal if a consortium of funders could collaborate to address these concerns and to consider the proposed strategies