

**Raw Data from FY17 OSP and CCSD Final Performance Reports – August 31, 2017**

The Commission's question:

**Besides financial resources, what does your organization believe are the three most pressing issues facing arts and culture nonprofit organizations in San Diego and what indicators lead your organization to believe this?**

Answers from FY17 contractors as of August 31, 2017:

1. 1. Fewer grant available for arts and culture from corporate and private foundations. We have lost three corporate donors in the past four years due to changes in giving guidelines.2. The rising cost of workers comp and liability insurance policies for smaller arts organizations. We reduced staff to keep our insurance premiums in proportion to our budget.3. Incremental increases to the minimum wage.
2. 1. To be competitive, a strong digital presence is needed, yet smaller nonprofits can't afford to fund a dedicated position to keep up with an ever-changing social media landscape. 2. The need to develop upcoming generations of leaders is urgent but competing directly with the private sector is not an option for nonprofits.3. Local, regional and statewide tourism marketing organizations could do more to raise awareness for the arts & culture sectors.
3. 1) All populations are not well represented in the audiences, boards, or staffs of arts and culture nonprofits; equity and inclusion needs to remain a priority.2) Reporting the impact of the arts and culture sector is important, but DataArts, funders, and others require vastly different configurations of the same basic information.3) High housing costs: Median Household Income is 57% of what is required to qualify to purchase a median-priced home. (San Diego Assoc. of Realtors, July 2017)
4. 1) Attracting younger audiences as indicated by the average age of core audience members 2) Competition for attention (live performance vs. electronically available performance & medium) as indicated by relatively slower increases in program attendance over several decades3) Changing social norms (face-to-face interactions vs. virtual interactions ) as indicated by observation and anecdotal feedback from core audience members and potentially interested individuals
5. - Affordable resources for smaller organizations for accounting and human resources to remain in compliance with constantly changing laws.- Corporate partnerships for smaller organizations not able to return a large marketing presence due to not offering enough value for large corporations to be interested in partnerships.- Opportunity and time to devote to advocacy. Especially in today's political climate it is a challenge to remain bipartisan, yet advocate for the arts.
6. Considering our highly-charged political climate, how can arts and culture organizations serve as a safe space for the community around social issues? San Diego arts and culture

organizations need to be proactive as oppose to being reactive with the ongoing issues. Cybersecurity threats are higher than they have ever been before and nonprofits are potential targets. With the ongoing budget cuts, organizations need to come up with ways to diversify revenues without compromising their core values.

7. Issue #1: Advocacy and Unity. Indicators: Continue strategic messaging to and by the entire arts community to make a more profound impact. Issue # 2: Lack of philanthropic legacy. Indicators: very few multi-generational philanthropic families; many entrepreneurs prefer to support entrepreneurship, rather than current institutions. Issue # 3: Equity, diversity, and inclusion. Indicators: Internal practices can be inequitable and difficult for orgs to identify.
8. 1. Availability of reasonably priced indoor venues with good acoustics and ample affordable parking. Indicators: while we strive to perform in unusual venues in underserved areas, availability and affordability of venues limits the options. 2. Insufficient media coverage other than paid advertising. Indicators: small non-profits without funds for advertising are able to publicize using only social media and email. Even getting a free listing in the San Diego UT's print issue is unpredictable.
9. The three most pressing issues facing the arts are 1) getting attention for our events with all the possibilities of entertainment in San Diego, 2) smaller arts organizations have trouble getting the attention of media as opposed to big arts organizations. For instance there is constant coverage of the San Diego Opera, the Symphony, etc. and 3) traffic having a negative effect on patrons willingness to travel to arts events.
10. Audience engagement and growth, and strategic growth in a dynamic community that offers audience members multiple ways to engage.
11. One issue is the stagnation and decline of audience engagement and growth. Our supporters and active concert attendees remain dedicated, but it's difficult to expand and grow a new audience, especially in a sector that is overcrowded with arts orgs all vying for people's time and attention. Second, the cutting of arts education in schools undermines the efforts of a lot of arts orgs to "grow" a new audience base. Finally, online access to a variety of arts mediums slows attendance in person.
12. 1. Retaining local talent: Local dancers have moved out of SD seeking more opportunities & pay in cities boasting robust arts support. We increased our contracts as much as possible, and have stopped some attrition. 2. Dance coverage in the media: This is lacking. Recent conversations w/Union Tribune staff indicate a moratorium has been placed on most dance coverage. 3. Relevance: Online media saturation makes it difficult to attract new patrons. Analytics demonstrate this.
13. 1. lack of public awareness of how important the arts are for an educated, creative, noble society (as indicated by the constant battle to maintain government funding for the arts) 2. lack of media coverage for arts and culture events (other than the big organizations that advertise extensively) (as evidenced by entire sections of the paper and blocks of broadcast time dedicated to sports, not arts and culture) 3. competition for audiences for live arts events (as opposed to watching Netflix)
14. It is vital that San Diego maintain affordable housing for artists to live and work in the area. The high cost of living in San Diego is driving artists to other cities and regions. The high expense associated with real estate also factors into limited venues for artists to

perform. The pay rate in San Diego also lags behind other cities in the country with thriving arts and culture sectors, driving artists to other markets.

15. We believe the three most pressing issues facing the arts and culture is a lack of education and understanding of how valuable the arts is for our lives and culture, little awareness of the hundreds of organizations that truly need recognition for the impact they are making in our community & a skewed perception that arts is a ""waste"" of time. We believe this because of the budget cuts happening to the arts & culture organizations in San Diego.
16. 1) San Diego not natl recognized as major arts city Indicator: Natl tours don't come here. Booking agents don't see SD as premiere stop like CHI, NY, LA, SF 2) Arts networks don't connect arts organizations to local businesses Indicator: Lack of corporate sponsors for major festivals 3) Poor integration/adaptation of arts with changes in technology Indicator: Trends in how consumers experience arts & culture. Must compete with less expensive home entertainment options, i.e. On Demand, Netflix
17. 1. Politicians lack of understanding of the relevance, value and importance [profitability] of the arts in building thriving and imaginative communities. What leads me to believe this? Budgets cuts. [NEA, City, etc] 2. Rising costs in acquiring, keeping physical spaces/prohibitive square footage/real estate 3. Diversifying senior leadership [ED, boards, executive management] at all levels on local institutions. Mainly White, Mostly male. 4. Always financial resources---from DIVERSE channels.
18. Diversity and inclusion is a challenge. Indicators include consistency in participation at sites in underserved communities and a lack of diversity in teaching artists, which may be a challenge to engage children in diverse neighborhoods. Non-family audience development is another challenge. For 27+ years, attendance has been steady at around 85% family/friends. SDCC is hired on a regular basis to perform as a subcontractor but collaborations in San Diego continue to be a challenge.
19. One of the challenges is the issue of crowding and parking in the greater downtown region. The creation of the park space at the County Building, the increase in parking meter costs, and additional development on the Bayfront have increased difficulties for people wishing to visit the Bayfront generally.
20. 1) Everything doubles back to funding this has never been easy or simple, and continues to be so. 2) Strategizing with electeds, the Commission, and those in the field to plan for looming budget cuts for FY19 our options may be limited but we need to plan. 3) Arts and culture needs to be important to all corners of San Diego. We must broaden connections between arts and people neighborhoods, including cultural and immigrant communities, social service providers, and government workers.
21. The growing number of science and tech companies in San Diego support education programs that are directly related to science and tech; however they seem unaware of the impact arts programs have on students' academic advancement! We could use the City's help in converting the STEM efforts to STEAM efforts. In addition, all of the philanthropy world needs to understand how critical it is to support nonprofits' general operating expenses.
22. 1) Lack of quality, professional teaching artists: Teaching Artist pool is shallow and shared amount arts nonprofits. Supporting quality training through the Teaching Artist's Institute is

fundamental to ensuring we have enough artists to serve demand.2) Engagement/Advocacy on a wider scale to engage parents, students, PTA's, teachers, corporations, communities in the demand for the arts and quality arts education. The arts are fundamental!3) Equity and diversity on board & leadership level

23. Capacity & operational performance:Lack of data-driven decisions. Too many decisions are based on anecdotal conclusions rather than metrics - need to measure to manage effectivelyToo much institutional knowledge and reliance on volunteers to perform mission-critical tasks. When these staff members leave, it creates a huge problemWe are failing to attract talented museum professionals and leaders due to uncompetitive salaries - talent, creativity & performance costs, but gives a greater return
24. 1) Threats to government funding. Many organizations benefit from support from the NEA, IMLS, and California Arts Council, all of which face serious budget cuts or elimination. The Museum has received important support from all of these.2) Dwindling membership. This is a national problem - fewer people are ""joiners"" and forego becoming members, but the Museum is among those that rely on this revenue for operating income.3) Expenses increase each year - security, staff, maintenance, etc.
25. Technical non-profit management skills training for organizational staff. Programs like the Nonprofit Academy at USD are a tremendously valuable step in the right direction.Data-driven evidence that arts and culture orgs are vital to San Diego to garner support by local businesses and help us make our case as a sector to the funder community.Awareness of small arts and culture nonprofits whose diverse offerings are often overlooked by tourists and residents drawn in by larger organizations.
26. 1.Advocacy for the arts: Educating the public and officials to the importance arts/cultural institutions as a significant economic driver with social benefits.2. Patron education: The importance of providing funds for indirect/operating costs to provide programs and services. 3. Access to art: Through technology and commercial vehicles consumers have more choice on how they access art experiences. The nonprofit arts sector needs to make art experiences relevant.
27. In addition to funding, the three most pressing issues facing the arts in San Diego equitable access to resources, the need to increase diversity city and foundation staff and panelists to include more minorities, women and arts professionals, and the recent effort to cut arts funding at this critical moment in the City's cultural history. The indicators that lead us to believe this are our own experience combined with conversations with other members of the arts and culture community.
28. Location: More sitesacross San Diego however most particularly in areas with less or no known performance spaces, galleries, etc. that are near public transportation, free parking.Price: The arts either are or people assume the arts is expensive. Subsidization so orgs can offer less expensive tix to low-income groups. Also, non profit rental costs for many theaters, performing arts spaces are still WAY TOO HIGH and subsidize or change.Diversity & Quality
29. 1. New business models for long-term sustainability of arts and culture organizations vulnerable to shifting market forces. 2. Younger generations, Gen X and after, adversity to 'joining' and what that means for museum membership programs and performing arts

season subscribers. 3. The housing affordability problem in San Diego as it relates to artists, performers, and arts and culture professionals.

30. 1) Like many arts organizations we are asking: How can the Symphony effectively open its doors to the entire region, ensuring that everyone feels welcome and engaged? We are looking for new ways to serve the many populations within our city, while creating opportunities for cultural understanding and exchange. 2) With the increasing income gap, insuring that all people have access to quality arts experiences. 3) The lack of support from government and civic agencies is taking its toll.
31. The three most pressing issues: 1. Collective marketing. When the museum collaborates, we achieve a much greater rate of success. 2. The Commission needs to make site visits. When the museum was finally visited by a member of the Commission, the discussion about our work and service to the community was more fairly addressed. And yes, that affected the ranking. 3. Advertising rates knock smaller organizations out of the competition.
32. Increased transparency of the Commission actions and activities, Increased contractor inclusivity in Commission activities Drastic improvement in the diversity of Commission staff Drastic improvement in the Commission's policies about funding distribution to small & midsize organizations Consistency in Commission policies & application process More technical assistance to contractors Establish a ceiling on funding to LBO's Increased Commission visibility in communities of color
33. Issues: 1) Reduced funding for arts and culture organizations regionally during major election years and from increased media attention to large-scale causes, such as homelessness, as evidenced by increased competition among arts groups for funding. 2) Rising costs for production, labor, and administrative functions (insurance, accounting), which may not be adequately factored into budgets. 3) Inadequate funding for capacity building and program sustainability, as funders prefer new programs.
34. Issue #1: Diversity & Inclusion - Working hard to be inclusive of everyone in our community-- both in our membership and audiences. That includes many attributes from race, income and culture to gender identity and orientation. Issue #2: Program Relevance - Present works that engage new generations of audiences and artists. Issue #3: Licensing - Evolution of accepted legal use of licensed artistic property (e.g., what was once a medley of songs from South Pacific--now requires Grand Rights).
35. 1.) Possible budget cuts to the Commission for Arts and Culture in FY2019 funding may be reduced next year to help with the pension situation. 2.) Abundance of activities in San Diego. Because of the climate, there are a number of activities for residents/ tourists to participate in instead of visiting institutions. 3.) Proposed cuts and/or elimination of NEA and IMLS by the White House. If this occurs, it will be detrimental to non-profits, reducing funding, and halting important research.
36. 1) Changing demographics. This is seen in declining museum visitation and overall support. 2) Recruiting board members. It can be difficult to locate and induct board members due to membership dues and fundraising requirements. 3) Access for youth to arts, culture, and sports. There are relatively few affordable or free programs available for children of modest means.

37. \*Promoting the arts to a broad range of local people and tourists, including art maps/guides  
\*Improving public transportation to arts venues, including trolley, bus, tours \*Attracting more young people to the arts INDICATORS: visitors to the gallery, sales of art, new/younger membership
38. We believe the three most pressing issues for arts in San Diego are lack of arts education programs, a declining interest in civic and cultural engagement among youth, and dwindling city funding. We are led to believe these factors after meeting with the San Diego Unified School District an hearing about budget cuts and lack of arts classes in schools, lower attendance at our productions by young people (18-35) compared to older patrons, and from reports of budget and the city's pension crisis.
39. Penny for the Arts initiative: While this could appear at first glance to be a financial issue, the reality is the lack of a focus for the Council and advocacy groups will lead to fractured advocacy efforts and an inability for policymakers to focus. Tourism and collaboration: As we look towards increasing collaboration and efforts to drive increased awareness in the tourism field, our product and programs must continue to be refined and developed with multiple audiences in mind.
40. One pressing issue facing the arts and culture non-profit organizations is recruiting qualified volunteers, and board members that are both qualified and not over committed. There are so many amazing professionals in San Diego, but so often peoples plates are so full that developing relationships that lead to long term support can be a challenge.
41. The three most pressing issues facing arts and culture nonprofits in San Diego, and specifically media arts organizations, are:- Diminishing theater venue options - few theater venues with up-to-date screening capabilities & seating capacity as high costs- Staff development resources-smaller staff sizes creates need for more volunteer support- Need for additional training to understand the inner workings of new databases or even Facebook analytics to help org.'s marketing efforts
42. It is an ongoing challenge to stay relevant, fun and exciting to the younger audience. Young visitors experience the world and entertainment in new & different ways. We have integrated interactive exhibits into the museum but guests indicate they want more. Technology changes rapidly requiring organizations to constantly assess new & different offerings. We also find it challenging to attract new volunteers. Our current volunteer force is aging out of service and they are difficult to replace.
43. This year, an experience shared by many in the arts community was the shock of the Mayor's proposed cuts to arts and culture in the FY18 budget. It will be important to work together to promote the value of arts and join with other allies in the community. In addition, changing demographics within the San Diego region continue to be an important issue, as well as the integration of effective technologies into the Museum/cultural experience.
44. 1. Making full use of evolving technology, but not eliminating older demographics who may be less inclined to use online resources. We find this both with regard to promoting events and also to sales. 2. Being understaffed. This is obviously an issue that could be solved with financial resources, but being able to hire more staff or make better use of volunteers is an ongoing struggle. 3. Affordable space. The high real estate costs in San Diego make it very challenging for non-profits.

45. Working with 28 nonprofit and civic organizations in residence at the ARTS DISTRICT, we observe these issues: Audience engagement - Small staffs are challenged with limited resources to grow audiences, market and promote effectively and grow earned income. Costs of operating - Increased costs for health insurance, minimum wage and utilities result in fewer dollars for art and audience engagement. Board development - New, creative and diverse board leadership remains an ongoing challenge.
46. Advocacy for the Arts has become a very pressing issue, with the Arts and Culture on the chopping block at all governmental levels. Attracting and keeping talented non-profit professionals is another issue that affects the arts and culture community. With funding levels decreasing arts and culture organizations are having to find innovative ways to keep staff on board. Last, marketing for the arts in San Diego needs to be at the forefront with all of the other San Diego attractions competing
47. Continuing sustained funding from the public and private sector continues to be the largest concerns for non-profits. Given the recent situation with the Mayor's budget and the President's stance on the elimination of the NEA, the mindset that a starting point to balance budgets is to slash arts and culture funding disproportionately is unfortunate. In hand with that, the challenge of getting your message out to the community is a difficult one in this time of almost too much information.
48. One of the issues we face is the stagnation and decline of audience engagement and growth. Another issue is the public's access to art or ability to make their own or view art from home (like virtual tours of museums). Finally, the continual cutting of arts education in schools undermines the efforts of arts & culture agencies, leaving young people less exposed to opportunities that can spark interest and engagement in the arts world and thus cultivate a new, young interest and audience.
49. 1. Overall belief that nonprofits are not efficient and do not spend wisely. 2. Dance is not recognized as a professional art form that 'fits in' with other art forms in San Diego. 3. Changing climate of where the public wants to see art; integrated into daily life, makes it difficult to explain/document. Indicators include: attitude & comments from general public when engaging in activities, lack of understanding dance that dance is a professional art, enrollment and attendance questionnaires.
50. 1) Unhealthy work/life balance for leadership. The pressure to do "more" with "less" falls on small staffs, who often sacrifice their mental, emotional, and physical well being to meet the organization's goals. 2) Cultivation of young individual donors and philanthropists. Many of our city's largest donors are in their twilight years. I do not see younger generations giving in the same way, and I don't see the gap narrowing. 3) Venues in diverse areas are almost non-existent.
51. 1. Engaging younger audiences in new and relevant ways: via collaborations, this issue appears to be widespread; as new generations participate, we are learning to adapt to how younger audiences communicate, especially via technology. 2. Teaching audiences about the important role arts and culture plays within a community: teaching the importance of philanthropy in being able to offer traditional events and cross-cultural communications via the arts

52. The current political climate seems to suggest that the arts is not an important aspect of society, from the dissolution of programs in school and national funding being pulled, which is a concern. Competition with other arts organizations for non-financial resources is an issue; there are a limited number of volunteers and board members available to serve at each institution. Lastly, reaching targeted audiences is always an issue, as evidenced by literary pockets who seem unaware of us.
53. Reflecting diversity of region: For example, people of color are 57% of California's population yet hold only 28% of Board of Director positions. We must work to become more diverse.- Meaning of 'place' in society: With access to the internet, people no longer need to leave their homes or neighborhoods. We must innovate and find solutions that are community-based.-Redundancy of efforts in STEM education: Instead of constant competition for funding, resources and clients, we need to collaborate
54. (1) Due to the fact that both our venues are located in the heart of downtown, one of the biggest challenges we face is the homeless populations that have settled in Horton Plaza Park and in and around the Civic Theatre, (2) declining arts education in schools, resulting in reduced engagement, and (3) establishing a continuing and loyal relationship with Gen X and Millennial audiences.
55. The Board of Trustees has not addressed this issue specifically. During FY2017 it did extensively review the Plaza de Panama project in Balboa Park which will certainly affect many of the Park's institutions. Flows of international tourism are an important indicator of the Society's future audience appeal, especially on Sunday afternoons. Declines in such tourism would be an unwelcome challenge. A third concern is the state of music education; it should be integral to education at all levels.
56. Our organization represents 30+ teaching artists and administrators who believe that there is a lack of collective thinking in San Diego when it comes to arts education and collaboration. In the absence of an arts leader "think-tank" or over-arching body of information on what exists (and what is missing) in the arts community across San Diego, many artistic efforts are doubled, toes are trodden on and opportunities are missed. In the absence of a city-wide blueprint this may be unavoidable.
57. 1. Difficult to bring out-of-town visitors to a small institution in a time of burgeoning social media. The marketing techniques, esp print media, are not as successful. 2. Need for a media specialist as it is hard to be heard as evidenced by on-line feedback and Google Analytics.3. Keeping qualified staff with limited salary and benefits. There have been three visitor services personnel who left this year for various reasons
58. 1. While improving, a continued public perception that local Arts & Culture organizations are not sector leaders.2. Creating programming that is rooted in issues compelling to the community.3. Equity in access to programming.Indicators: Our organization is working to advance all of the above, our increased audience engagement indicates these efforts are well received.
59. The three most pressing issues facing arts and culture organizations in San Diego are infrastructure maintenance (particularly deferred maintenance of City of San Diego-owned facilities), developing new audiences, and engaging current audiences. As the demographics of the City of San Diego and nation more broadly shift to having a racially and



socioeconomically diverse population, so too must the continued shift of museum audiences and donors be addressed.

60. The Arts and Culture Commission is doing an admirable job helping to solve the issues listed below....Need for more unity and agreement on a common agenda. Launch more successful partnerships.Lack of recognition for great work done. Help promoting and positioning as key players in San Diego.Weakness in public policy. Nonprofit leaders need to have the confidence to become more involved in the legislative processes to help drive decisions that impact the future of their organizations.
61. 1-Partnerships: Audience members and patrons are wanting more collaborations between institutions to better serve and have more impact in the community. 2-Promoting and nurturing local talent and balancing it with presentations of national talent. San Diego has great homegrown artists but often they are not presented by the ""big"" art orgs. 3-San Diego needs to continue to advocate and promote a thriving arts culture in order to create a mindset shift towards support of the arts.
62. 1) Lack of affordable space. NTC was originally proposed to help provide for that need, but it never happened. 2) The arts being continually kicked out of the places they have been able to procure when big business wants to come in, with money readily available to displace artists and art organizations. 3) Always feeling like the ground is shifting under our feet with continually changing governmental policies and edicts. Artists and arts groups have to be extremely flexible to survive.
63. 1. The need to form strategic partnerships with a wide range of businesses and social organizations in order to integrate the arts throughout the fabric of our community 2. The need to create musical experiences that can engage new audiences. 3. The need to educate and inspire the younger audiences to attend classical arts events.
64. Few affordable and easily accessible performance spaces available in the City of San Diego, constraining organizations' ability to provide free or reasonably priced programming for the community. Indicators: artists and audience members.The brain drain of the creative class in San Diego. The high cost of living and lack of affordable housing puts a strain on artists and their families. Indicators: artists.
65. Arts organizations are facing a decline in ticket sales as a result of an aging population, as well as a challenge in attracting younger audience members. Younger generations are not as committed to live theatre, or the arts in general, and tend to not purchase season subscriptions because the competition for their attention and attendance at events is too high. A lack of funding for arts in the schools is also a challenge, as we have observed within the schools that we work with.
66. My comments concern smaller institutions with budgets under \$500K. Obtaining qualified, fundraising board members. We have passion, but not deep pockets. Being a board member of a small organization doesn't have the cache of being part of a large, well-known museum. Media publicity and coverage for events. So much to do and see in San Diego, it's hard to get even 30 seconds on TV or radio. Competition for time. Families are over-scheduled and lots to do in San Diego, (beach, etc.).
67. 1. Audience development, particularly for smaller organizations. Audience earned and contributed support does not equal the artistic quality of San Diego's companies, and even

major organizations are cutting back on production levels.2. Board Member recruitment/retention - It's getting extremely difficult to entice qualified candidates to make a board commitment.3. Ability to hire qualified technical and administrative personnel.

68. 1) Retaining trained teaching artists. Competition for TAs makes it difficult to foster a collaborative environment between orgs. 2) A perception of the arts as purely entertainment, without a social purpose. We all need to work to reinforce that the arts are vital in creating and maintaining a vibrant and thriving community. 3)The disparity of resource distribution around the county. There should be a greater emphasis on supporting arts in the more economically challenged parts of the city.
69. 1) Space for classes and rehearsals - within the community. Partnerships with for-profits for space on weekends and off hours would be great!2) Consistent attendance, competition for time at schools. Music and art are most often pull-out programs, disrupting other school classes or competing with after school programs - despite the extensive VAPA catalog outlining requirements.3) Versatility - addressing different learning styles, speeds, and environments, especially in the inner-city.
70. DIVERSITYStories resonating with multiple groups offer intercultural/intersectional approaches, bring people together, provoke conversation & build empathy.PUBLIC SUPPORTAs institutional funders, particularly government, pull back from active arts support, how do we show that the arts are vital to community health/well-being? COMMUNITY ENGAGEMENTEngaging the local community brings San Diego voices/issues to light & decreases barriers.INDICATORSNational studiesSurvey dataRecent events
71. Subscription model, cultivating young audiences, changing media environment: Subscriptions are relatively flat while single-ticket sales have increased; yet converting single-ticket buyers remains elusive. Younger adult audiences tend to be event-oriented, which doesn't translate into institutional support or repeat attendance. The advertising market is more segmented than ever. Newspapers are consumed mostly by an aging audience. Web-based media is so diverse it's difficult to make impact.
72. Audience development. A 2015 San Diego Union Tribune article reported that attendance numbers are down across many organizations, and our organization has had flat attendance for several years. Board development. San Diego has a relatively small number of Fortune 500 companies, a common source of board recruitment. Lack of Affordability. San Diego is an expensive place to do business and live. High rent, utilities, and insurance are a burden on arts groups as well as on artists and patrons.
73. Retaining experienced staff in organizations. Non-profit turnover rate is much higher than other sectors. While the living hourly wage has increased by law other employee wage scale has not. Promote from within for non-profit leadership. Non-profits hire executive level staff from the for-profit sector or outside of their own organization instead of promoting from within. How do we change that mindset and build and keep talented staff? Board Development. Many smaller non-profits need help.
74. 1.Relevance - Making change through community engagement and art (as opposed to the "arts for arts' sake" philosophy)2. Reputation Making San Diego known as an arts and culture destination, not just as a beach and brews destination 3. Business Model - Monetizing assets, diversifying revenue streams, balancing earned and contributed revenue,

managing expenses and building cash reserves. These, and a community-valued mission/vision are vital to an organization's longevity.

75. Issue 1: Changing audience engagement (Indicators: gradually decreasing membership and attendance); Issue 2: Increasing Museum accessibility to diverse audiences (Indicators: lack of diversity in audiences, growing cultural appropriation awareness in news media and social media (i.e. Boston Museum of Fine Art Kimono incident) and an ever increasing understanding and visibility of the issue in the field (Arts conferences, blogs, etc.); Issue 3: Political climate that is unsympathetic to the Arts.
76. 1. Finding qualified staff is becoming more difficult. We have been looking for the right people to fill a couple of positions with key responsibilities for more than two years. 2. As competition for classical music audiences grows, it is increasingly important to articulate differences between organizations, even as it becomes more expensive to do so through traditional media outlets. 3. A central point of communication among non-profits would be helpful, maximizing collaborative possibilities.
77. We have identified the following three issues as most pressing for arts and culture organizations in San Diego through data and anecdotal info and observation :1) Increased competition in grants due to projected cuts to federal funds 2) Lack of representation from non-traditional or smaller arts organizations at important convenings (conferences, workshops, stakeholder meetings) 3) Lack of funder knowledge on the role of the arts in promoting health, education and employment outcomes
78. Small to mid-size non-profits seem to continue to need more assistance in recruiting, training and retaining staff. WE are able to bring in and train many recent college graduates. But, the challenge is to continue to pay them what they are all worth as they grow and increase their leadership role here. Plus, the lack of affordable art spaces to produce and exhibit art of all types continues to be a challenge for many arts organizations and/or individual artists in San Diego.
79. These challenges are discussed at the annual board retreat. First, there is too much competition in San Diego. Residents and tourists have too many things to choose for entertainment with beaches and numerous outdoor activities available year-round, a healthy arts and culture community and sporting events. Another is education of the arts. Two generations now have had minimal exposure to the arts in school, due to budget cuts. Lastly, many people just can't afford to attend cultural events.
80. A shortage of financial resources, while in itself a challenge to building a successful non-profit, also has broader implications. When theatres feel financially challenged, they tend towards programming that does not stir the thinking of their audiences or provide new perspectives on relevant stories because there is a fear of pushing away ticket sales. Therefore, the breadth of programming available in the community is not truly reflective of its diverse perspectives. It's power is diminished.
81. The three most pressing issues facing arts and culture organizations in San Diego include building truly inclusive organizations, a tendency toward competition instead of collaboration, and the challenge of building a sustainable organizational infrastructure.
82. Venues are very hard to come by in San Diego and we are constantly trying to come up with clever ways to partner and align itself with institutions who do have appropriate venues for

performance possibilities. Although it seems to be shifting we have also found that many arts organizations are hesitant to collaborate, wanting to "hold onto" their audience, contact lists and donors as tightly as possible. Lack of communication/dialogue between organizations is another challenge.

83. Limited funding resources for arts and culture-Limited organizational infrastructure to pursue best branding and marketing practices-A media that can be political and functions with limited professionalism
84. 1. How to effectively evolve/adapt the organization's appeal/relevance to a local audience besieged with alternatives how to spend "free" time.2. Identifying talented people willing to contribute their time/skills to serve as organization officers/board members.3. How to spend our next promotional dollar for maximum effectiveness.Indicators include limited budgets, expensive & unreliable methods to determine effectiveness of promotional activities, and a competitive & changeable marketplace.
85. Opportunities for meaningful collaboration remain rare and elusive. Smaller organizations continually struggle to keep things afloat, so often have little or no opportunity to develop meaningful creative and, potentially more important, organizational partnerships. The infrastructure provided by the Fringe Festival really helps. I wonder whether that could be a model as a platform for groups that are less fly-by-night than Fringe, yet less established than OGT or the LJ Playhouse.
86. Three pressing issues are 1. Providing access to quality cultural programming to residents and visitors is critical to maintaining our quality of life. Balboa Park is a significant cultural asset in our region with many of our most prominent cultural institutions all located within easy walking distance of each other. 2. Better promotion of the Park is vital to the ongoing health of these institutions and 3. Better maintenance of the physical plant at the Park is needed.
87. Local working artists have told us that lack of arts education leads to lack of an educated collector base that could support working artists through the purchase of artwork. Artists therefore leave to larger cities, such as nearby Los Angeles, to sell work and make a living. Additionally there are a low number of artist-in-residency programs and local grant awards to sustain working artists.More business education and other practical skills that would assist artists in making a living.
88. 1. Assistance for Operational Support - Continued operational support to attract and retain personnel. 2. U.S.-Mexico Border Relations - The President's administration is yet to determine if changes in processing and movement across the U.S.-Mexico border will be impacted. 3. San Ysidro's economy has been hurt with the Border Reconstruction project . The SY Chamber is reporting over a 60% vacancy rate and continuing to grow. This will continue to cause a dis-interest in border communities.
89. PRESSING ISSUES (for the arts): Ensuring - Inclusivity, Diversity, & Equity. INDICATORS: Socioeconomic composition of patrons attending arts eventsOur solution: Fringe has the benefit of being affordable / accessible to all ages and cultures is that this allows for the most vast audience and allows us to reach all populations.
90. The greatest issue facing arts and culture organizations in San Diego is their inability to present art to a wide audience of consumers. There are few large scale opportunities for

regular San Diegans to purchase local art. San Diegans who wish to purchase art from a local have to seek it out through attending obscure art crawls or visit galleries. The CA&C should continue to invest in events that are attended by thousands of San Diegans so as to expose them to local art.

91. Corporate Community Involvement:(need corporate support): City requesting the corporate community would help in bringing a larger audience to support organizations that are focused on bringing exceptional arts programs. Rental facilities: This cost has increased by about 17% over last year; hence organizations are struggling to find venues at a reasonable cost.Publicity: It would be easy for the city to help broadcast events that are funded by the city grant to help generate more attendees.
92. Increased transparency of the Commission actions and activities Increased contractor inclusivity in Commission activities Improvement in the diversity of Commission staff Improvement in the Commission's policies re: funding distribution to small & midsize organizations Consistency in Commission policies & application process More technical assistance to contractors Establish a ceiling on funding to large budget organizations
93. Lack of information and guidance, along with a feeling of isolation in Southeastern San Diego neighborhoods; Audience development and sustaining new audiences over time; Lack of space/facilities to show work and engage in dialogue with other artists and community members.
94. pressing issues include:1. How to reach out to the community in a resource-efficient way.2. Intellectual property/trademark/copyright rights and 'fair use' doctrine. 3.Finding resources to solve problems (e.g., venues of certain sizes).These are issues that we run into consistently and have to spend disproportionate amounts of time and energy to resolve, re-inventing the wheel when we know that others are having to solve the same problems on their own.
95. The current political climate which villainizes refugees and immigrants. It is especially important for arts and culture organizations to highlight the beautiful parts of refugee cultures and to share these with San Diegans now. Lack of knowledge about refugee cultures among San Diegans and the need for greater collaboration between arts and culture organizations representing refugee populations are two other important issues.
96. 1. Recruiting/retaining qualified instructors who are sensitive to special needs of our populations (language, culture, trauma, recovery from addiction, etc). Due to not being able to offer competitive salaries or full-time work. Staff often have to work multiple jobs creating scheduling challenges. 2. Attracting underserved art students and art audiences in a neighborhood where socioeconomic situations prevent having free time to participate.3. Attracting customers from outside District 9.
97. Inflation will always be an issue for organizations. The rising costs of services, spaces, and goods every year attributes to how the limited financial resources are able to be used. Another issue, most prominently shown this year, is how the political climate may affect an organization's programs and events and the diverse groups involved. Finally, being able to find and keep talent without individuals (volunteers year-to-year) getting burned out from overworking.

98. Issues facing arts and culture non-profit organizations in San Diego include limited community involvement, limited access to affordable facilities, and poor media coverage. Little Italy often partners with many small artists and organizations that struggle for recognition and publicity, having no funds for marketing and promotion. We are fortunate to have a PR firm to publicize our events and try to provide collaborative opportunities to work with exceptionally talented people.
99. Originality Too many events with the exact same characteristics. You can see this in concerts and festivals throughout the city. Authenticity: Some people are discouraged from participating in authentic cultural events that seem too "foreign." They prefer an Americanized event that feels new but also familiar. Lack of artists As more attention and resources are focused on academia and business, a livelihood in the arts seems less and less appealing for many up and coming artists.
100. Limited number of theatres available and rental fees are two major challenges. Few venues met our needs and allow us to support neighborhood businesses and restaurants. There are constant upgrades and improvements with media. Remaining up to date with technological advances and utilizing these services is an ongoing yet ultimately challenging factor. Although willing to commit time, many potential board members are hesitant when it comes to fundraising issues and financial responsibilities.
101. 1) Not enough arts education within the juvenile justice system. 2) Quality arts programming in the juvenile justice system is rare. We are told by our partner teachers that quality arts programs for court schools are extremely expensive and unavailable. 3) The arts education gap between rich and poor is expanding. This can be seen in the isolation we witness in the children we serve.
102. 1. Threats to our freedom of press and expression 2. Loss of societal values for the arts 3. Loss of value for inclusion and diversity. On August 18, 2017, members of the President's Committee on the Arts and the Humanities resigned in part due to his elimination of arts and culture agencies in the current budget. On June 6th, City of Chula Vista deliberated on cutting their Arts and Culture programming. The City of San Diego also considered severe cuts to the arts. Arts are threatened!
103. 1. Ongoing maintenance for public art pieces. Although we are careful to have each mural properly built & installed (itself a significant expense), we must be constantly vigilant about vandalism/wear and tear. 2. Insurance. The cost of insurance continues to increase dramatically, and it is also harder to secure insurance with constantly changing requirements. 3. The undervaluation of art. All art projects must face the lack of understanding of the value of art by the culture at large.
104. 1) Venue availability, finding creative space that is affordable and viable to have performing arts in particular 2) Volunteer engagement 3) Attracting participants/spectators to events, keeping events fresh particularly because we now see for profits imitating event models.
105. BOARD/LEADERSHIP TRAINING: Many of the Board Members slowly drifted out and the Leadership was unable to move/renew itself. Training in this area will show how vital this is to our organization. SUSTAINABILITY-we lost a good core of its Company Dancers (ages 16-40) and now rely on our Junior Dancers/Apprentices (ages 4-18) to carry the flag.

ARTS/EDUCATION/LIBRARY Conference/Gathering to network and know what's available in our community where all arts organizations can share.

106. The three most pressing issues:1. A shortage of adult volunteers- we see a large group of student volunteers every year, but the number of adult volunteers seems to be less and less.2. Community Involvement- student volunteers love this event and come back year after year. But as they move on to college out of the area, we lose this pool of volunteers3. Insurance cost- in a society of lawsuits, the need for more and more coverage increases and so does the financialburden on the NPO
107. Government changing rules,regulations, and applications for events; volunteer retention; and creative vendors for the Street Fair.
108. Getting people's attention. How do you rise above the glut of information that is available? How do you stick?
109. 1) The growing prevalence of junk email and phone calls, and social media, has made email and phone much less reliable. Some participants only check their email every week or two. Inability to reach volunteers before an event is a symptom of this problem.2) Decline of printed publications with the rise of electronic media has removed an effective targeted source of event promotion. Participants report publications as a source much less frequently.3) Recruitment of sponsors for annual event.
110. For the Festival, the amount of time that teachers have to engage their students in outside enrichment activities is very limited. Many are not permitted to take part in programs like the Festival because principals want them to be working only on things that are tested. Reaching underserved schools and communicating the relevance of a Shakespeare Festival to them - especially schools that have many students for whom English is not their primary language - is a challenge.
111. Three pressing issues are:1. Convincing certain populations that the arts actually are important, just as important as business, science and math. The arts are the first courses to get cut in the schools when funds are tight.2. Ability of arts organizations to promote who they are and what they do.3. Appropriate levels of staffing. But of course this leads back to money.
112. There are many competing activities, performances & events happening all year in San Diego, competing for public/media attention. Many are free. One of the biggest challenges is keeping our event fresh, interesting & inviting while staying true to our organization's mission. The 2nd most challenging issue is competition for media exposure with earned media. The 3rd issue is the availability of real estate/transportation/parking. We are limited in attendance by the constraint of these factors.
113. Three important issues facing arts and culture nonprofit organizations in San Diego include access to available and affordable venues for arts and culture programming; educating and developing new audiences and supporters for small non-profits; access and capacity to provide appropriate, affordable, and impactful assessment and evaluation tools for programming.
114. It is difficult to entice families that are not accustomed to attending cultural events, to take the time and make the effort to come. If it is not a part of their culture or their

typical day, they don't understand the value and importance of such activities. Nor are they convinced that it is a worthwhile investment of their time. When people are encouraged by friends or family to attend an event, they are more likely to come.