CREATIVE SECTOR NEEDS ASSESSMENT:

GAP ANALYSIS REPORT

Report to the

City of Austin
Economic Development Department
Cultural Arts Division

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Introduction

Austin has recognized that the lines between the creative output of nonprofit arts and culture organizations, individual creatives, and for-profit creative enterprises are becoming increasingly blurry – the economic and social values that derive from cultural engagement are not limited to a specific business model. Given that the City of Austin is already measuring the economic impact of the city's creative sector, has identified the importance of growing and investing in the creative economy across planning platforms, and won two ArtPlace America creative placemaking grants, there is a need to examine the support structures that allow creatives and arts/cultural organizations to work and thrive in Austin. By increasing its understanding of the support needs and the available resources, the city will be able to invest in the continued growth and long-term sustainability of the creative sector.

The recommendations from the CreateAustin Cultural Master Plan, the Imagine Austin Plan, and the mission and goals of the Cultural Arts Division (CAD) all highlight the importance of providing creatives and arts/cultural organizations with resources and services that will increase their creative capacity and improve their business development acumen. In the past, CAD has continually sought to improve its support programs, but given the rapid pace at which creative enterprises are changing and the need to deploy resources more strategically, the intersection of several planning efforts make this an ideal time to step back and complete a comprehensive analysis of the existing support services, service gaps, and overlaps.

The purpose of this Gap Analysis is to learn how individual creatives and arts/cultural organizations in Austin access support services, what barriers they encounter in accessing those services, how suitable the available resources are, and what their future needs are expected to be. With a successful comprehensive assessment, the City of Austin will be positioning its creative community and the arts and culture sector to continue their vital contributions to the city's character, quality of life, and economy for years to come.

Following the general introduction and sections on the Scope of Inquiry and Research Methodology, the report is split into two parts: the first examines the results of the Survey of Individual Creatives, and the second provides an analysis of the Survey of Arts and Cultural Organizations. Summaries of major findings from both analyses are to be found at the end of the report along with a brief comparison of the two sets of results.

An earlier draft of the Gap Analysis was delivered to the Steering Committee on May 18 and presented in an open community meeting on May 20, 2015. The public meeting was designed to obtain feedback on the survey findings from the creative community. Comments from the public meeting have been integrated into the summary of findings at the end of this report.

This Gap Analysis is the second of three reports being submitted to the City of Austin as part of this project. The first was an interim report, submitted to CAD on March 31, 2015, which includes the topline results of the survey data. The third and final report for the project (Conclusions and Recommendations) will be submitted in July.

Scope of Inquiry

This inquiry focuses on two specific groups within the creative industries: 1.) individual creatives, and 2.) arts and cultural organizations that operate in the nonprofit and public sectors.

Creatives

Creatives are individuals who produce artistic, cultural, creative or aesthetic content for consumption by others. As part of this study we sought to hear from adults in the Austin Metro Area who:

- have received extensive training in a creative field or have otherwise acquired creative skills;
- are actively engaged in creative work and presenting it to the public; and
- derive income or attempt to derive income from their creative activity.

Following this definition, we encouraged participation by artists of all disciplines as well as people who are active in other creative fields. Creatives may or may not be formally employed in their creative field. They may have one or more “day jobs” that are unrelated to their artistic/creative work, as long as they are also actively engaged in creative work from which they hope to earn additional income. It is irrelevant whether creatives pursue their creative work in the nonprofit, for profit, public, or informal (unincorporated) sector.

Arts and Cultural Organizations

In terms of organizations, we sought input from a wide variety of arts, culture, and heritage organizations that operate in the nonprofit and public sectors. This includes nonprofits, state and municipal institutions, organizations that are affiliated with universities, and the likes, but not commercial enterprises. The survey was to be completed by the executive leader of each organization or another staff member who can represent the organization’s interests. Only one survey was to be completed per organization.

Research Methodology

In order to identify gaps in the available support services for creatives in Austin one must examine the availability and effectiveness of existing services on the one hand, and the support needs of creatives on the other. In addition, the needs of individual creatives are likely to differ from those reported by arts/cultural organizations, so that separate analyses of these two constituencies are necessary.

To this end, two online surveys were launched in January 2015. One survey was to be completed by representatives of arts, culture, and heritage organizations; the other was intended for individual creatives. The survey protocols were developed in close collaboration with CAD staff and tested by several members of the Steering Committee in December 2014. The surveys were opened to the public on January 14 and closed on March 14, 2015.

Participants were recruited through public announcements, emails, and social media. Two screening questions at the beginning of the survey were used to assess the respondents' eligibility to complete the survey. Individual creatives had to be over 18 and reside within the Austin-Round Rock MSA to participate in the survey. To complete the survey for organizations, respondents had to be qualified representatives of their organization (one per organization) and the organization had to be located within the Austin-Round Rock MSA.

Initially, we planned to gather data from two distinct samples for each survey: the public sample that was open to all, and a smaller "curated sample" that was to consist of individuals who were handpicked by Steering Committee members as representative of the creative community. While the curated sample was to be relatively small (100-150 respondents), it would be possible to ensure that all major constituencies within Austin's creative community were adequately represented. Comparisons between the curated and public samples would then indicate to what extent the public sample (over which the researchers had little control) seemed representative of the creative community as a whole.

In the end, the responses from the curated group were combined with the public sample, because the response rate for the curated sample was deemed insufficient for useful comparisons. Since there is no definitive data on the size and composition of the creative community in Austin and the survey sample was not generated randomly, the representativeness of the results cannot be determined via significance tests. Rather than providing generalizable conclusions about the Austin's creative community as a whole, the results of the survey are best considered as the outcome of an extensive consultation process in which over 500 creatives have shared their opinions. Ideally, they should be considered in the context of a larger and ongoing conversation with the creative community that informs the development of effective support services for Austin's creatives.

In addition to the online survey, the Steering Committee hosted an open community meeting on May 20, 2015. CAD issued an open invitation to this meeting, so that anyone interested was able to attend, whether or not they had completed the survey. The purpose of this session was to receive feedback on the main findings of the survey from the creative community.

Twenty individuals attended the community meeting, eight of which were individual creatives and ten represented Austin-based arts/cultural organizations. After a brief presentation that outlined the composition of the survey sample and major findings, attendees were divided into small roundtables, some of which were designated for individual creatives and other for representatives of arts/culture organizations. Within these groups, participants discussed "what rings true or and what doesn't" in the findings and went on to prioritize the findings for further action. Comments from the public meeting have been integrated into the summary of findings at the end of this report, and thoughts on further action will be incorporated into the Conclusions and Recommendations that will be submitted as the third an final report for this project.

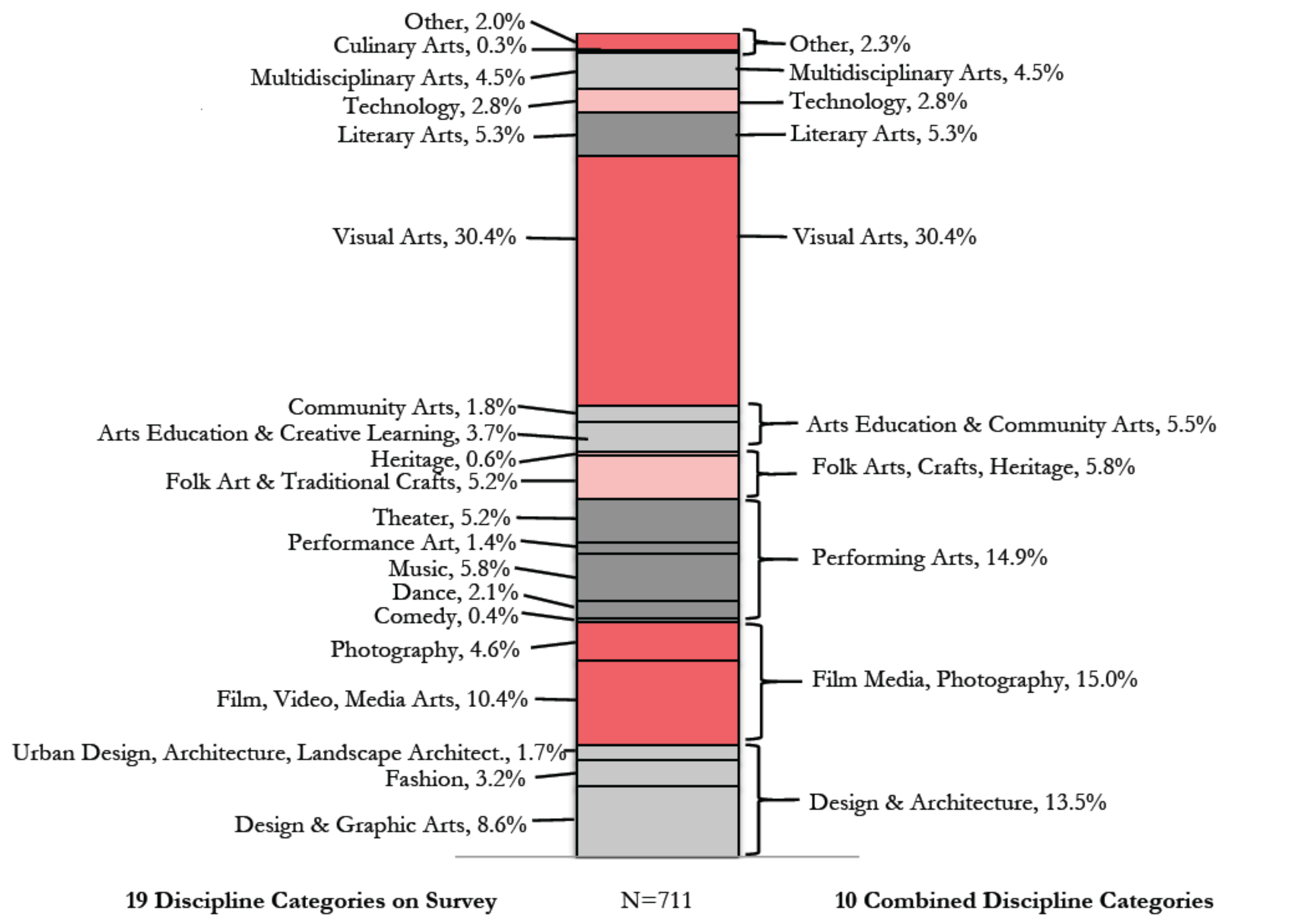
Survey of Individual Creatives

In this section we analyze the assessments of current support services and the expected future resource needs reported by individual creatives in Austin.

Overview of the Sample

A total of 978 eligible respondents started the survey for individuals (i.e., answered at least one question), and 528 respondents completed it in its entirety. An additional 190 responses provide usable data for at least one section of the survey.

Figure 1: Creative Disciplines



Nineteen discipline categories were included on the survey, all of which were represented in the sample. For the purpose of analysis, the disciplines have been combined into the ten categories shown in Figure 1. The Visual Arts are the most strongly represented discipline with a total of 213 respondents. The Film, Media and Photography and Performing Arts categories both include over 100 responses (107 and 106 respectively), with Design and Architecture falling just below that threshold (96). The other discipline categories received between 20 (Technology) and 41 (Arts Education and Community Arts) responses.

While it is possible to gain a rough sense of the racial composition and ethnic mix of the general population in Austin based on census data, it is difficult to compare the demographics of our sample to this data for several reasons (Table 2). Our survey allowed people who identify with multiple racial categories to select all that apply (potentially inflating the representation in each category), whereas the census expects such individuals to select "two or more races." Further, since some people object to being categorized under racial labels, we included a "prefer not to say" option, which was selected by 13% of our respondents.

Table 1: Survey Respondents by Race and Ethnicity

	African American or Black	Asian	Native American or Alaska Native	Native Hawaiian or Other Pacific Islander	White	Other Race	Prefer not to say	Total
Hispanic	5	1	4	0	30	9	4	46
Non-Hispanic	8	15	5	1	364	10	14	408
Prefer not to say	1	1	3	1	5	7	51	61
Total	14	17	12	2	399	26	69	N=515*

*Respondents were able to select multiple races, so that the sum of the race categories exceeds the number of respondents (515). Not all survey-takers answered the race and ethnicity questions, so that the number of responses is smaller than for other questions.

Table 2: Race and Ethnicity of Survey Respondents Compared to General Population of Austin

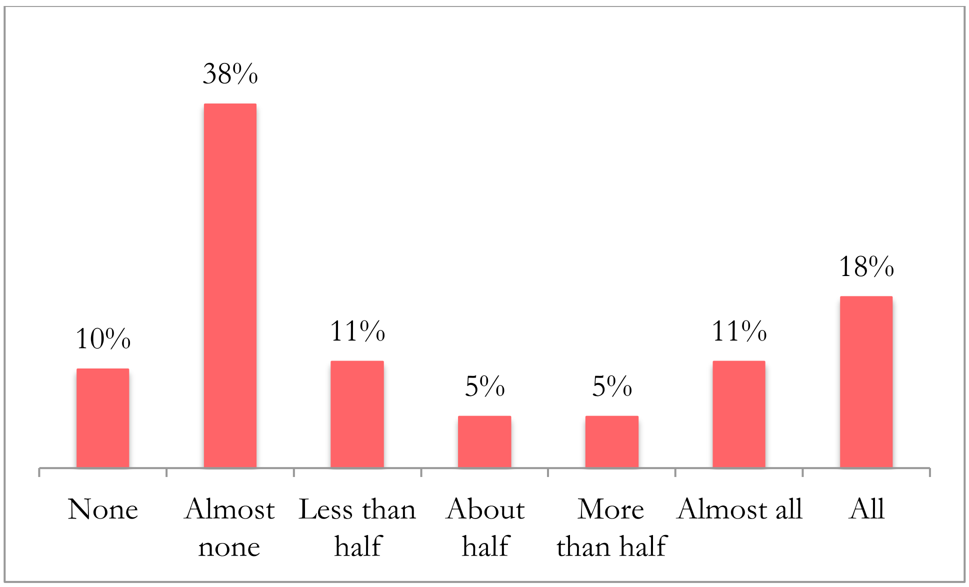
	Percent of respondents	Austin-Round Rock MSA*
African American or Black	2.7%	7.5%
Asian	3.3%	5.2%
Native American or Alaska Native	2.3%	0.8%
Native Hawaiian or Other Pacific Islander	0.4%	0.1%
White	78.1%	71.7%
Hispanic	8.9%	32.5%
Non-Hispanic	79.2%	67.5%

*Source: The Nielsen Company (2015 estimates)

While one must interpret the comparisons shown in Table 2 with some caution, it appears that proportionately fewer African Americans and Asians completed the survey than are represented in the general population of the of the Austin-Round Rock MSA. By contrast, Native Americans are more strongly represented in our sample than in the general population. In terms of ethnicity, 8.9% of our respondents identify as Hispanic, while 79.2% identify as Non-Hispanic, and 11.8% selected the "prefer not to say" option. By comparison, 32.5% of the general population of Austin is Hispanic. It is difficult to say to what extent these discrepancies reflect the demographics of Austinites who choose to pursue creative professions, or whether they result from our outreach and sampling procedures.

Our sample captures a good mix of respondents in terms of age and career stage. Respondents are roughly equally distributed across the age range from 25 to 65, with 21.6% falling in the 25-34 range, 25% in the 35-44 range, 20.8% in the 45-54 range, and 20.8% in the 55-64 range. Only 3.2% of respondents were younger than 25 and 1.6% over 65. Regarding their career stage (which is defined differently in across disciplines), 31.7% of the respondents identified as early career, 44.3% identified as mid-career, and 18.3% as late-career artists or creatives.

Figure 2: Proportion of Personal Income Earned from Primary Creative Practice



Almost half of the respondents earn less than 10% of their personal income from their primary creative practice (labeled "none" or "almost none" in Figure 2).[1] On the other end of the spectrum, almost a third (29%) of the survey participants earn most or all of their income for their creative work. This "u-shaped" distribution of earnings is not unusual among artists and creatives, where a lot of people either earn most of their income from their creative work or almost nothing at all, with very few in between.

[1] In the survey, "primary creative practice" was defined as "the creative practice that you would most like to develop, expand, or otherwise "take to the next level" over the next 3 to 5 years."

As Figures 3a and 3b demonstrate, we received responses from creatives throughout the region, though there are clearly pockets of concentration.

Figure 3a: Map of Respondents' Home ZIP Codes (region)

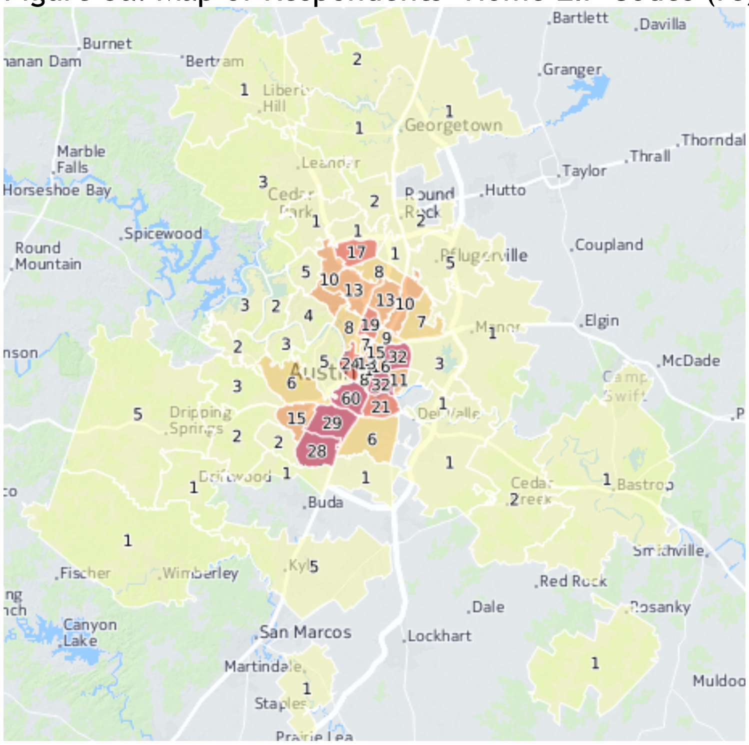
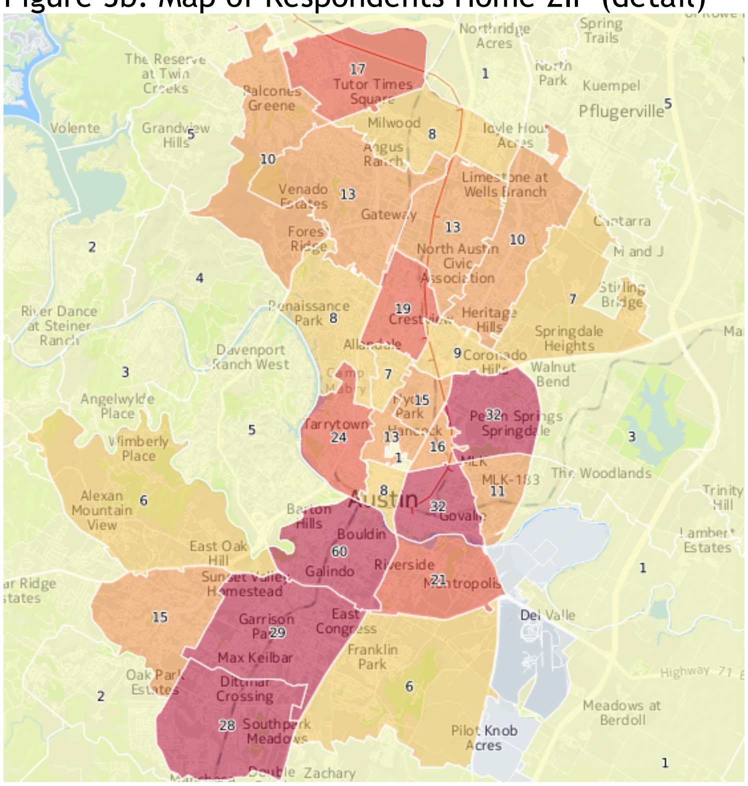


Figure 3b: Map of Respondents Home ZIP (detail)



Services Accessed

The survey for individual creatives asked a series of questions about the types of services and resources that the respondents have accessed over the past three years. In many cases, the respondents were subsequently asked to identify specific venues and organizations that have been particularly helpful in providing those resources.

Creatives find out about support programs and professional development opportunities to support their primary creative practice through a variety of sources. Respondents listed over 500 ways they found out about services to support their creative practice. The Austin Film Society and City of Austin were the only formal organizations to be listed regularly. The most popular avenues of learning about opportunities are: colleagues, friends, email, the internet (largest response), meet-ups, networking, peers, social media, and word of mouth (second largest response). A large number of responses also expressed the desire to know more about what is happening.

Respondents have been more active in taking advantage of social networks and networking events than in programs or events that develop their business, marketing or entrepreneurial skills. Over 70% of the respondents have participated in some form of networking, while only 12% have taken advantage of opportunities to improve their business skills over the past three years. When asked which networks or networking events had been most helpful in developing their creative practice, those who participated in such events most frequently mentioned AIGA Austin, SXSW, and Social Media.

Table 3 shows the verbatim items written in five or more times in response to the following questions:

1. Which of the networks or networking events that you have participated in over the past three years have been most helpful in developing your primary creative practice? Over 800 items were identified by the respondents.
2. Which of the events, seminars, workshops or programs that you have attended in the past three years have been most helpful in developing your business, marketing or entrepreneurial skills? Respondents identified over 400 items.
3. Over the past three years, what have been the most valuable information resources in supporting your primary creative practice? Over 1,100 individual listings were submitted.

Table 3: Most Useful Resources (by category)*

Networks	Events, Seminars, Workshops	Information Resources
AIGA - 28	AIGA - 9	AIGA - 6
Austin Creative Alliance - 9	Austin Community College - 5	Austin Creative Alliance Newsletter - 6
Art Alliance Austin - 5	Austin Craft Riot - 11	Austin Chronicle - 5
CAD: Artist INC - 4	Austin Film Society - 6	Austin Film Society - 15
Austin Ad Federation - 6	City of Austin: CAD - 24	Callforentry.org - 5
Austin Craft Riot - 8	City of Austin: SBP - 13	City of Austin: CAD - 8
Austin Film Society - 25	Contemporary Austin Creative Capital - 7	Dribble - 5
Austin Film Festival - 8	Online - 8	Etsy - 14
Austin Visual Arts Assoc – 5	Sundance Artist Series - 5	Glasstire - 9
Big Medium, incl. EAST and WEST - 48	SXSW - 33	Indiewire - 7
Creative Arts Society - 8	University of Texas- 6	Internet - 13
Creative Mornings - 6		Lynda.com - 8
Scriptworks - 6		Magazines - 8
SXSW - 31		New York Times - 7
		Poets and Writers - 7
		Professional Artist - 5
		Scriptworks - 6
SOCIAL MEDIA - dozens		Smashing Magazine - 9
		SXSW - 5
		SOCIAL MEDIA - dozens

* These lists summarize survey participants' submissions to open-ended write-in questions. They only include organizations that were mentioned five or more times, though it may well be that organizations listed less frequently than that are providing significant services for a particular niche of creatives or for a group that is not well represented in our study. For a full copy of the write-in responses for this survey, including the full lists of resources that are summarized in this table, please contact the City of Austin Cultural Affairs Division.

The overlap between the lists of organizations that provide networking opportunities and more formal professional training (Table 3) suggests that many creative individuals find value in connecting to these organizations through numerous means. These organizations have a relationship with the creative community.

The survey also asked which information resources have been most valuable over the past three years in developing the respondents' primary creative practice. We received

1100 responses to this open-ended question (respondents were invited to list up to three resources). The most popular resources (those cited five or more times) are summarized in the right column of Table 3.

One question on the survey asked about participation in mentorship programs. While 41 respondents (7%) had a mentor to help guide their development over the past three years, 94 respondents (15%) reported having served as a mentor to someone else.

The majority of survey respondents are not applying for or receiving grants, fellowships or monetary awards in support of their primary creative practice. Only 21.5% have applied for these types of funding and just 12% have received such support. If this number seems low, it can in part be explained by the fact that almost 60% of our respondents pursue their creative practice as an owner, co-owner, or employee of a for-profit business. Among the 81 who did receive grants, the most commonly cited sources of funding are the Austin Film Society, City of Austin Cultural Arts Division, City of Austin Parks and Recreation Department, the National Endowment for the Arts, the Sundance Institute and the Texas Commission on the Arts.

In reviewing the types of resources that the survey respondents have accessed over the past three years, it appears that they find significant value in networking and are particularly tapped into social media, SXSW, AIGA, Austin Film Society, E.A.S.T., City of Austin, Capital Factory, and Austin Creative Alliance as resources. Across all of the questions related to access, social media had by far the largest response (Facebook, Twitter, Instagram, etc). The ability to establish connections through various avenues including social media and organizations that provide different types of networking appears to be a very important form of support for creatives.

The Significance of Services and Program Offerings

To analyze this material, we have prepared a matrix that lists organizations that provide services to individual creatives, the range of services they provide, the extent two which these services were used, and how they were perceived by survey respondents. The range of services included in the matrix is based on three of the components of the "support structure" identified in the Urban Institute report "Investing in Creativity: A Study of the Support Structure for U.S. Artists."[2] These are material supports, training and professional development, and community/networking. The Support Services Matrix is located in APPENDIX A.

[2] Accessible at http://webarchive.urban.org/publications/411311.html

The Support Services Matrix shows that there are many service providers offering similar services, and that creatives are utilizing a wide array of services. The survey collected three pieces of information about each of the organizations listed:

1. Has the respondent heard of the service organizations or program?
2. Has the respondent participated in programs or taken advantage of services provided by the organizations in the past 3 years?
3. If so, how significant does the respondent believe them to have been for the development of his/her primary creative?

The service organizations with the highest levels of participation among responding creatives were:

Austin Public Library
City of Austin, Cultural Arts Division
Austin Film Society
SXSW Education and Tech Panels
Austin Creative Alliance

Interestingly, 26% of the 618 respondents have not engaged with <u>any</u> state or local service organizations. With respect to national service organizations, the most heavily utilized are AIGA, National Endowment for the Arts, Americans for the Arts, and Theatre Communications Group.

In terms of the significance of their services, 24 of the 43 organizations listed on the Support Services Matrix received mean assessment scores over 3.0. Only 2 organizations received mean scores of above 4. While we can interpret the scores over 3.0 as evidence of the positive impact of these service organizations, we should not ignore those that received lower scores since they may be providing other services not reflected here or serving a particular niche in the creative community that is not captured in the survey.

In looking at the usage and assessments of the organizations listed in the Support Services Matrix, it is important to keep in mind that some organizations serve a very specific niche in the creative community with targeted programs while others serve a wider public. Looking at the usage by discipline (not shown here) reveals that some organizations and programs such as the Austin Community College Continuing Education Program, the SXSW Education and Technical Panels, and the City's Cultural Arts Division were used by over 10% of the respondents in seven or eight of the ten discipline categories. This shows that they serve a wide range of creatives. By contrast, organizations such as the Writers League of Texas are primarily used by a single discipline, but serve a considerable portion of the creatives within that particular field (e.g., over 35% of literary artists report having used the Writers' League's services in the past 3 years).

Interestingly, some organizations that one might assume to be specific to a certain discipline actually serve a wide variety of creatives. This is the case, for example, with the Austin Film Society, which was utilized by 55% of respondents working in Film, Media, and Photography, but was also used by a good portion (more than 10%) of the respondents in seven other disciplines. (Design & Architecture, 11%; Performing Arts, 11%; Folk Arts, Crafts & Heritage, 11%; Arts Education & Community Arts, 25%; Technology, 16%; Multidisciplinary Arts, 22%; Other, 21%).

Barriers to Accessing Support

The survey asked respondents about barriers they face in accessing the support they need to take their creative practice to the next level.

The most frequently cited barrier, selected by almost half of the respondents, is the lack of information about the available opportunities (Table 4). Nearly half of respondents indicated that they "don't know what is available or where to find out" or "[…] don't find out about opportunities until after they've happened" among the main barriers that keep them from getting the support they would like. Other frequently cited barriers include affordability (38%), lack of appropriate forms of support (36%), lack of time to take advantage of the available support (32%), and the lack of resources that are specific to the respondents' creative practices (32%).

Table 4: Main Barriers to Accessing Support (all disciplines)

	White	Hispanic	Non-white
I don't know what is available or where to find out/ I don't find out about opportunities until after they've happened.	50%	53%	49%
I can't afford it/ it's not worth the money	38%	51%	60%
The type of support I need isn't available/ there's not enough of it	35%	44%	47%
I don't have the time to take advantage of the available resources	32%	47%	30%
The resources/services I know of aren't specifically for artists/creatives/my type of creative practice	33%	21%	28%
I don't think the resources/services are intended for people like me	27%	23%	40%
I don't meet the eligibility criteria	13%	19%	23%
The resources/services I'm aware of don't interest me	12%	14%	21%
I'm not able to access the resources/services because their location is inconvenient	8%	5%	26%
I'm not sufficiently motivated to take advantage of the available resources/services	9%	14%	9%
Other	7%	5%	5%
None. I have access to all of the support I need.	4%	0%	7%
N=532	532	43	43

Notes: "White" includes both Hispanic and Non-Hispanic. "Hispanic" includes all races. "Non-white" includes all respondents who identified as African American or Black, Asian, Native American or Alaska Native, Native Hawaiian or Other Pacific Islander. It does not include those who identified as "other" (5%) or selected "prefer not to say"(13%). See Table 1 for detailed breakdown of race and ethnicity.

The lack of information is particularly felt in disciplines in which creatives traditionally work in isolation (not shown here). Among visual and literary artists, over half (54% and 59%, respectively) of the respondents felt this was a major barrier. By contrast, in the

Performing Arts and Film/Media/Photography this was a secondary concern (selected by only 38% of respondents). In these disciplines the availability of support was the most frequently cited barrier, reported by 49% and 54% of the respondents in those disciplines, respectively.

The responses from ethnic and racial minorities reveal a similar pattern of barriers as seen in the overall sample (Table 4); however, many barriers—especially financial barriers—are experienced even more frequently among minority respondents. Similarly, almost all of the barriers loomed larger for respondents who earn less than 50% of their income from their creative activities (not shown here). In particular, respondents in that category refer to the lack of information, affordability, and the perception that the available resources aren't intended for people like them as barriers more frequently than respondents who earn most of their income from creative work.

Four in ten non-white respondents feel that the available resources and services are not "intended for people like me." Most of the non-white respondents who selected this answer identify as Asian, Native American, or Pacific Islander; however, there are so few respondents in these categories, that one must interpret the results with some caution. Interestingly, a smaller proportion of Hispanics and African Americans selected this response than in the overall sample. In this response the meaning of "people like me" was open to interpretation and by no means limited to racial or ethnic identities. A further review of the issue is therefore merited.

Strengths and Weaknesses of Existing Support Structures

In addition to the multiple-choice question that asked about the barriers they face in accessing support (discussed above), the survey asked respondents to describe the biggest challenges and barriers they face in "taking their creative practice to the next level." This was posed as an open-ended question so that respondents could express themselves in their own words. The main themes that emerge in their responses are the lack of space, time, funding, and awareness of what support services are available. Respondents frequently mentioned affordability of living and working in Austin as an issue, and many also noted that there was insufficient branding and marketing of themselves/their businesses. Finding buyers and other opportunities to sell their work was another significant concern. Several respondents also listed self-doubt and needing to work other jobs among the challenges they face, which may relate to the increasing cost of work spaces and the challenge of building name recognition in a crowded market.

Based on the responses we received to other open-ended questions about the strengths and weaknesses of the existing support structures for creatives in Austin, it is clear that Austin's reputation as a mecca for creatives is perceived as a double-edged sword. On the one hand, it makes for a vibrant and exciting creative community, but on the other it is fueling the rising costs of living, making it difficult to build market awareness for one's work, and crowding some people out.

Over 800 comments were entered for the question about weaknesses/areas for improvement in the existing support structures. The most frequent responses relate to affordability, communication and marketing, funding, facilities, and the make-up of the creative community.

- *Affordability*: Major themes include cost of living, housing and exhibit space; number of creatives now living in the Austin area; expectation of free work; and gentrification of neighborhoods.
- *Communication and marketing*: Concerns focus on event visibility; public awareness of what is available in Austin; needing more outlets to showcases and sell work.
- *Funding*: Several issues related to needing more financial resources, not enough people buying art, and lack of living wages for creatives.
- *Facilities*: The lack of (affordable) facilities for storage, office, rehearsing and performing is a concern for many individual creative respondents.
- *Make-up of the creative community*: Respondents complained that Austin is too focused on music, there is too much snobbery among creatives, too many cliques in an overcrowded and disorganized creative community.

The issue of affordability, based on actual costs as well as opportunity costs, is a common theme throughout the responses to this survey.

Of nearly 600 comments entered in response to the question about the strengths of Austin's support structures the most frequent clustered around themes such as the variety of creatives, amount of creativity in area, sense of community, strong creative 'vibe', supportive programs and potential for growth.

- *Variety of creative*: Respondents commented on the fact that creatives at every career level are here and that there is strong support for younger creatives. Many believe the ecosystem for creatives is a good one and that it supports a large number of working creatives. There appears to be agreement among the respondents that the caliber of the creatives living in the Austin area is high.
- *Level of creative activity*: The sheer number of events and festivals in Austin is also seen as a strength.
- *Sense of community*: Though seemingly contradictory to several statements made in response to the question about weaknesses, several respondents feel that the creatives in Austin work well with each other and often provide informal mentoring. Many also mention a can-do attitude, an accepting and open-minded community with a collaborative spirit, and dedication to volunteering a lot of time for the community good.
- *Supportive services*: In this context respondents identified the Austin Film Society, the focus on supporting the music industry, and access to support programs and services.
- *Strong creative 'vibe':* It is easy to be 'weird', and the creatives are passionate, hardworking and inspired.

While the survey respondents see Austin as a vibrant creative community with potential for growth, they only expressed mild agreement with the statement “Austin is a great place for artists and creatives to live and work” (Table 5). On a scale from 1 (strongly disagree) to 5 (strongly agree) the mean level of agreement with this statement was just 3.5. When asked if they feel nurtured and supported by the community of artists and creatives in Austin, they agreed at a slightly lower level of 3.3. It appears there is still room for Austin to improve its standing as a great place for creatives and as a place where they feel fully supported.

Table 5: Overall Satisfaction

Q24. To what extent do you agree or disagree with the following statements?	Mean Rating (1-5)	N
Austin is a great place for artists and creatives to live and work.	3.5	611
I feel nurtured and supported by the community of artists and creatives in Austin.	3.3	603

There is some variation in the overall satisfaction levels between the creative disciplines that are not shown in Table 5. Respondents in the Technology and Folk Arts, Crafts, and Heritage fields are more inclined to think of Austin as a great place for creatives than their peers in other disciplines (mean ratings 4.2 and 4.1, respectively). By contrast, performing and multidisciplinary artists in the sample show greater ambivalence about this statement. The average score assigned by respondents in these disciplines is just 3.2 (where 3.0 indicates that the respondents neither agree nor disagree with the statement). Overall, non-white respondents (African American, Asian, Native American, and Pacific Islander) are slightly less enthusiastic about Austin as a place to live than white respondents. The mean score for all non-white groups (45 respondents) is 3.2, compared to 3.6 for white survey participants. The difference between Hispanics and Non-Hispanics is smaller, with mean scores of 3.4 and 3.6, respectively.

The perceptions of Austin as a great place to work are not simply a reflection of the extent to which creatives feel supported. Respondents working in arts education and community arts feel most nurtured and supported (mean 3.7), followed by those in Folk Arts, Crafts, and Heritage and Film, Media and Photography (both 3.6). Meanwhile, the average scores for designers, architects, visual artists, and those in “other” disciplines are considerably lower (between 3.1 and 3.2).

The discrepancy between white and non-white respondents in regards to feeling nurtured and supported is somewhat higher than for the assessment of Austin as a place to live and work. The average rating from white respondents is 3.6, compared to 2.8 among survey takers who identified as African American, Asian, Native American, or Pacific Islander. The mean score of 2.8 indicates that the non-white respondents tend to disagree with the statement “I feel nurtured and supported by the community of artists and creatives in Austin.” While Hispanic respondents gave slightly lower scores than Non-Hispanics, they are on average still slightly above 3.

We have discussed the scores that respondents assign to these two statements in some detail here because they may be considered summative outcomes measures of the services that are provided. Ideally, the scores on both of these measures will improve over the coming years as a result of improvements that are made based on recommendations from this study.

Anticipated Needs

To explore the resource needs of Austin's creatives, respondents were asked to assign a priority level to each of eight types of support, based on their expected needs over the coming three years. As Table 6 shows, access to networks and communities of peers tops the list of priorities, though financial support follows closely behind.

Access to suitable work, rehearsal, and performance spaces is also among the top priorities, but there is greater variance across creative disciplines on this point (not shown in Table 6). Indeed, for performing artists, space is the most highly ranked need (mean score: 4.42), surpassing both networks and financial support.

Table 6: Expected Resource Needs over Next Three Years (individuals)

Q27. What do you expect your resource needs will be over the next three years?	**Mean Priority Rating (1-5)**	**N**
Access to networks/community of peers	4.02	561
Financial support	3.97	559
Access to suitable work/rehearsal/performance space	3.51	556
Artistic training/ further development of creative skills and technique	3.45	557
Access to equipment and/or materials	3.41	551
Access to professional services provided by third parties (e.g. accounting, marketing, legal services)	3.33	551
Training in business, management, and/or administration	3.05	557
Training in delivering educational services	2.27	554

In terms of training and professional development programs, the creative individuals who responded to our survey rank opportunities to develop their creative and/or artistic skills well above their desire for training in business, management, or administrative skills (which received a mean score of just over 3 – the mid-point in the range from low to high priorities).

A separate question asked respondents more specifically about the topics they need to learn about in order to advance their creative practice over the coming years (Table 7). Of the 18 options listed, "Getting publicity and critical recognition" emerges as the top priority. The desire for further learning on this topic is consistent across all creative disciplines. It is the top priority in seven of the ten disciplinary categories and the second-highest ranked option in the other three disciplines.

Table 7: Prioritization of Topics For Further Training (individuals)

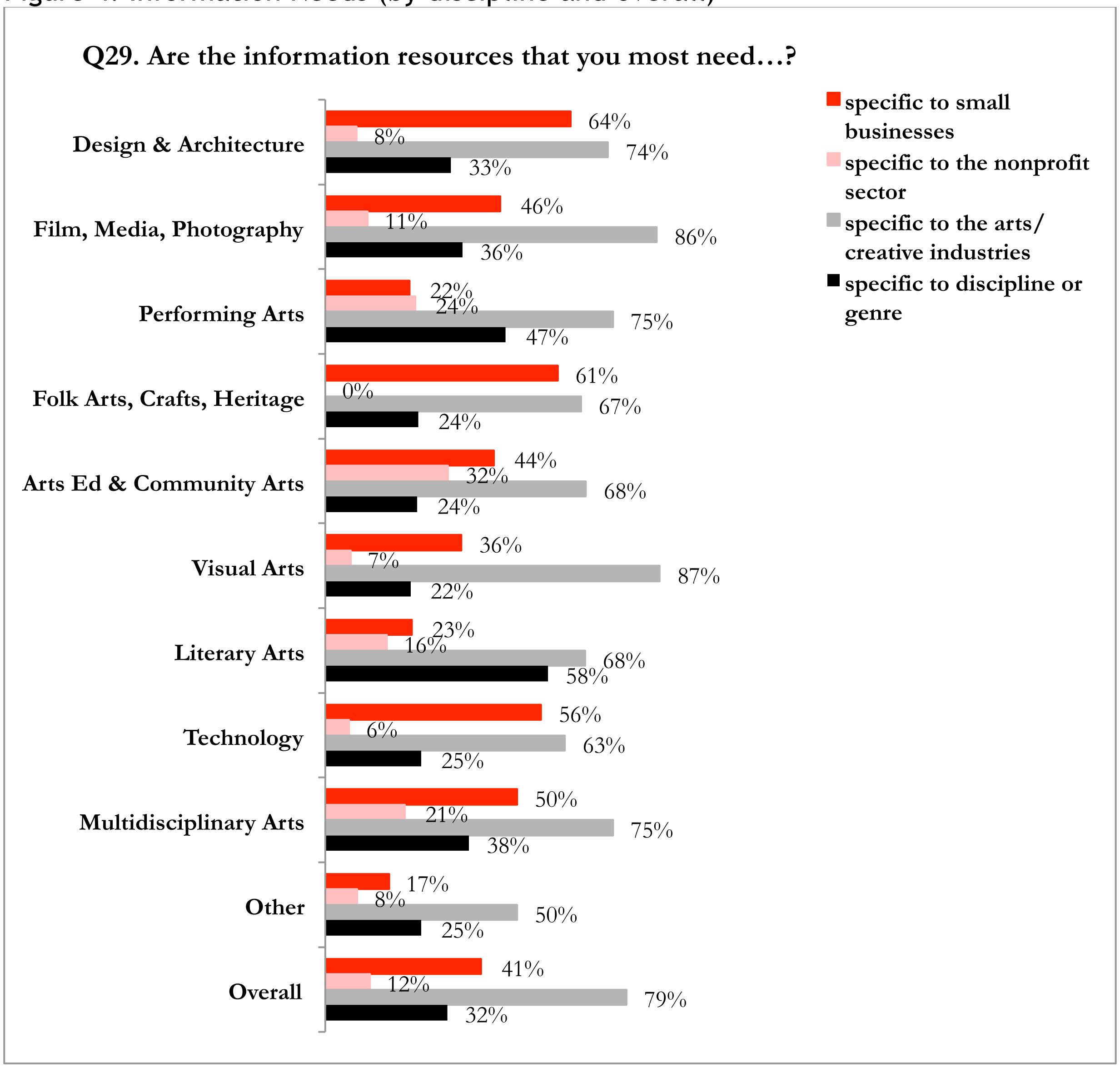
Q28. Which of the following topics do you most need to learn about in order to advance your creative practice over the next three years?	Mean Priority Rating (1-5)	N
Getting publicity and critical recognition	4.11	530
Artistic/creative development	3.71	516
Web presence and social media	3.58	523
Collaborations/partnerships	3.51	524
Marketing and advertising	3.47	528
Business skills	3.41	523
Community outreach	3.34	523
Getting professional representation/agent/booker	3.26	524
Strategic planning / business development	3.23	516
Financial management	3.19	517
Fundraising/donor cultivation	3.13	514
Career planning	3.13	521
Copyright and/or other legal skills	3.06	518
Grantwriting	2.96	519
Contract management	2.88	518
Advocacy	2.76	504
Information about starting my own business or nonprofit	2.69	516
Training in delivering arts education and creative learning services	2.38	512

Artistic and creative development appears as the second most highly sought area of learning overall, which is congruent with the emphasis on these forms of professional development discussed above (Table 6). Other top topics for further education include "web presence and social media", "collaboration and partnerships," and "marketing and advertising." While most of these topics are of considerable interest to respondents from all creative disciplines, the results are less consistent for "collaboration and partnership," which received an average score of 4.12 among respondents in the Multidisciplinary Arts category and just 2.74 from those in Folk Arts, Crafts, and Heritage.

In the disciplinary breakdown (not shown), respondents in the Design and Architecture category are consistently are more interested in business related topics such as "business skills," "career planning," "contract management," "financial management," "strategic planning," and "information about starting my own business or nonprofit" than other disciplines. While this might be attributable to the fact that Design and Architecture have traditionally been more commercially oriented than more narrowly defined "arts" disciplines, this pattern does not emerge among the (relatively few) survey respondents who work in technology fields, which are likewise dominated by for-profit enterprises.

The survey included two questions that sought to determine the environments and/or communities in which respondents prefer to access services. While a greater number of survey takers seek information that is specific to the arts and creative industries than are interested in information that applies to small businesses, most don't think it is necessary to access information that is tailored specifically to their creative discipline or genre of work. In certain disciplines (Folk Art, Crafts and Heritage, Design and Architecture), small business information is sought almost as frequently as information for the arts and creative industries. With the exception of respondents in the Performing Arts, the nonprofit sector is of lesser interest than information for small businesses.

Figure 4: Information Needs (by discipline and overall)



The same question also included response options that allowed survey takers to indicate whether the information resources they need are primarily specific to Austin or national in scope (Table 8). The topline results for the overall sample show little differentiation between these two options; however, a closer look reveals that there are considerable differences between the creative disciplines.

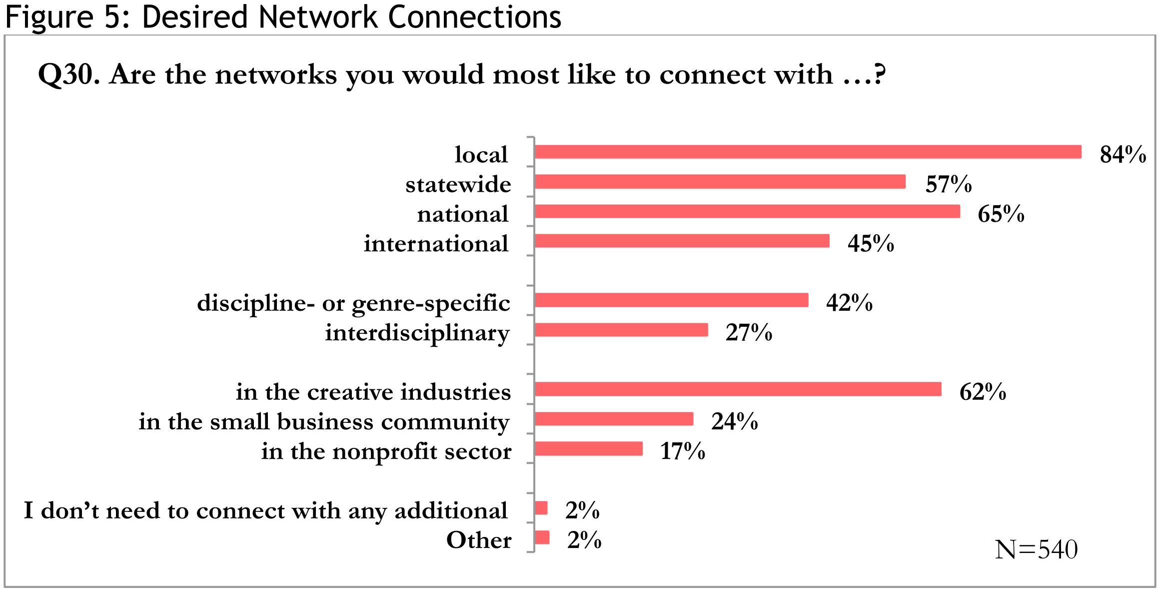
In the design, media, arts education, literary, and technology fields there is a preference for national-level information, while the opposite is true in the performing, visual, and multidisciplinary arts, folk arts, crafts and heritage.

Table 8: Information Needs (by discipline and overall)

Q29. Are the information resources that you most need…?	… specific to Austin	… national in scope
Design & Architecture	26%	49%
Film, Media, Photography	40%	47%
Performing Arts	53%	35%
Folk Arts, Crafts, Heritage	45%	18%
Arts Ed & Community Arts	28%	36%
Visual Arts	46%	38%
Literary Arts	32%	55%
Technology	38%	44%
Multidisciplinary Arts	71%	54%
Other	50%	25%
Overall	43%	41%

The preferences regarding local and national information resources do not correspond to the networks that respondents most want to connect with. Regarding networks, all disciplines prioritize local connections, demonstrating the significance of community building initiatives at the local level. National networks are only cited as frequently as local networks in two fields (Arts Education/Community Arts and Literary Arts), and never surpass the local. Overall, 84% of respondents want to connect with local networks.

Figure 5: Desired Network Connections



Most respondents want to connect with networks in the creative industries, rather than with small businesses, or the nonprofit sector, echoing the appetite for information resources in these areas. As with the information resources, the small businesses community is still of greater interest than the nonprofit sector in terms of networking, with the exception of the Performing Arts and the Literary Arts.

Assessment of Specific Program Ideas

A series of twelve questions asked respondents to indicate their level of interest in a set of support program ideas, based on short program descriptions (Table 9). The program ideas listed were fictitious examples that were designed to test respondents' interest in a range of formats and subject matters.

Table 9: Ratings for Specific Program Ideas

Please rate your level of interest in the following types of support services for creatives.	**Mean Rating (1-5)**
A website for creatives, searchable by artistic discipline or creative field (e.g. culinary arts, theater, dance), that lists upcoming events, classes, grants, online discussions, and other opportunities in Austin.	4.36
A public lecture series featuring notable artists and creative professionals from all over the US. The speakers discuss their creative work and give audiences a peek into their creative process. The 90-minute events are held in a central location and are intended to appeal to the general public. 30 minutes are reserved for questions from the audience.	3.85
A funded mentorship or coaching program in which you get to choose a mentor/coach to work with you for one year, focusing on building a specific aspect of your artistic or administrative capacity.	3.73
Peer Study Groups in which artist and creatives meet with a small number of peers in their creative discipline (up to 8 per group) on an ongoing basis to discuss topics of mutual interest. The groups meet once a month at locations that are chosen by the participants. Topics would be set by the group members in advance of each meeting, so that the participants can prepare themselves for the discussion. The discussions might focus on a recent book or publication that is relevant to their work, or a specific question such as "What grants are available to creatives like us?" or "How can we get our work shown internationally?"	3.56
A Creative Resource Center, where creatives and organizations can access up-to-date information on developing products, templates for business plans, contracts, fundraising, etc. in a central location. In addition to books, journals, and reference materials, the center features equipment (computers, scanners, printers) that can be used for a fee.	3.51

Short online videos that can be watched (and rewatched) at any time. Topics include: "Managing your Risk: Insurance for Artists and Creatives," "Protecting your Rights: Copyright issues for Artists and Creatives," and "Taxes and Deductions for Artists and Creatives."	3.45
Ninety-minute workshops for small groups of creatives, held in a central location (advance registration required, max. attendance 25). Topics include "Public Relations 101: Getting the Media to Tell your Story," Advanced Technology Skills: Website Design and E-newsletters," "Social Media: Do's and Don'ts."	3.43
One-hour webinars geared towards artists and creatives in which successful creatives discuss "secrets of their success" in their particular field/discipline.	3.39
Six to eight-week courses (90-minutes per week) that cover business skill topics specific to the creative sector in considerable detail. The courses are led by experts in the field, with occasional guest speakers from the local arts and creative sector. A general subject such us "Financial Management" is broken into individual classes on specific topics (e.g., on budgeting, bookkeeping, capital reserves), but participants register for and are expected to attend the full series of classes. The classes are held in a central location.	3.03
An incubator program that provides new creative businesses, nonprofits, and individual entrepreneurs with shared office space for a period of three years (participants must pay rent for the office space). As part of the program participants hold weekly meetings to discuss successes and challenges in their work.	2.81
A series of hour-long panel discussions on topics that are relevant to all small businesses, such as developing a business plan, marketing, and accounting. The panels consist of a mix of experts in each field and small business owners who speak about their personal experiences. The events are held in a central location.	2.78
One-hour webinars with opportunities for Q&A designed for entrepreneurs of all types (i.e. not specific to the arts or creative industries). The topics include: starting your own business, accounting software for small businesses, e-commerce for small businesses.	2.62
N=527-531	

A comparison of the highest and the lowest ranked program ideas reveals that there is no clear preference for in-person or web-based formats. The top three programs include an informational website, a public lecture series, and a mentorship program. On the other end of the spectrum, the lowest ranked programs include an incubator program for creative enterprises, webinars, and in-person panel discussions.

However, there seems to be a preference for informal means of engagement over structured formats. Of the top six program ideas, only one (the public lectures) has a specified beginning and ending time. By contrast, five of the six lowest ranked programs state specific timeframes for the events (60 or 90 minutes). This suggests that Austin's creatives prefer to access support resources on their own time, rather than having to schedule around specific events. Moreover, programs that are pitched to the small business community or that address business-related topics tend not to be high priorities, which supports preferences expressed in the questions about desired services.

The above analysis is based on the assumption that respondents read the descriptions of each program carefully and took all aspects of the program into consideration in determining their priorities. However, it is quite possible that respondents merely skimmed the descriptions and made their decisions based on the most eye-catching descriptors, e.g. "one-hour webinar", "peer study group," "incubator." If that is the case the most noteworthy observation is the low rank assigned to programs that mention the time commitment involved in the initial description of the event (e.g. "one-hour webinars", "hour long panel discussions", "six to eight-week courses").

The final question about the needs of individual creatives on the survey asked respondents, "If you were in a position to add one new resource or program to the existing support structures available in Austin, what kind of resource or program would best serve your needs?" We received over 900 write-in responses to this question, many of them quite extensive.

The most common themes related to resource development and access to other creatives. There were also many calls for centralized services, such as a central location/co-op for creatives to connect with each other and the public or a centralized resource center (including a website) that could assist creatives in accessing services, support creative businesses, and help creatives find collaborators. In line with these calls for centralized resources, several respondents expressed their desire for a place that provided business management services, could assist in developing portfolios, providing funding, grantwriting assistance, and things as simple as a central Facebook page for Austin creatives.

Another popular suggestion included a city staff person who could provide administrative support for small organizations, peer-to-peer programs to facilitate the sharing of resources and materials (including space), additional studio, rehearsal and performance spaces, and an incubator for emerging creatives. Affordable housing also shows up as important.

Many of the write-in suggestions echo concerns and needs that are also expressed elsewhere in the survey. Overall, it seems that most of the individual creatives who responded to our survey seek avenues to help themselves through mentoring, central resources, networking, workshops, and the likes. In addition, there is a desire to increase the general awareness of the value of art, which might lead to a more lively art market. While there are certainly also calls for more funding and advocacy on their behalf, generally the individual creatives are looking for services and opportunities that will enable them to chart their own future.

Survey of Arts and Cultural Organizations

The survey invited the participation of a wide variety of arts, culture, and heritage organizations, including nonprofits, state and municipal institutions, and organizations that are affiliated with universities. It was not intended for creative businesses, as the City of Austin's Small Business Study conducted a needs assessment of small businesses in 2014. The survey was to be completed by the executive leader of each organization or by another staff member who is able to represent the organization's interests. Only one survey was to be completed per organization.

Overview of the Sample

A total of 103 eligible respondents started the survey for organizations. Of those, 67 completed the entire survey. An additional 19 respondents provided usable data for at least one section of the survey.

We received responses from a great variety of organizations, both in terms of their budget size and the type of work they do (see Table 10). The survey included a list of 21 organizational "types" that respondents could select from and the opportunity to write in an "other" response. We received entries in 14 of the 21 categorical "types;" however, 25% of the respondents were unable to find a suitable category for their organization and selected "other." The write-in responses are remarkably diverse, including a circus arts studio, a quilting guild, and a video game company.

Table 10: Survey Responses by Type of Organization and Budget Size

	$0-$50k	$50k-$200k	$200k-$1 mill.	$1 mill. +	Total
Advertising and Public Relations	1	1	0	0	2
Art Gallery	3	3	0	1	7
Arts Education, K-12	0	2	1	1	4
Arts Facility/Venue	0	0	3	1	4
Dance Company	2	1	2	1	6
Design Services	1	1	1	0	3
Fine Arts School	1	1	0	0	2
Motion Picture, Video and Sound Recording	1	0	0	2	3
Museums	0	0	1	2	3
Musical Group	3	0	1	0	4
Professional and Management Development Services/Training	2	2	0	0	4
Theatre Company	6	4	2	2	14
Other Education and Instruction	1	0	0	0	1
Other Performing Arts Organization	3	2	0	2	7
Other	7	5	7	3	22
Total	31	22	18	15	86

While the sample reflects a wide range or organizations, it should be pointed out that over a third (36%) of the organizations operate in the performing arts (theatres, dance companies, musical groups, and "other performing arts organizations"). By comparison, just 8% of the responses came from art galleries, and 4% from museums. Moreover, there was no representation from architects, college or professional arts schools, culinary arts schools, historical sites, or literary organizations.

In terms of budget size, over a third of the responding organizations operate on less than $50,000 per year. While this is the most strongly represented budget category, a good number of larger organizations also participated in the survey. 25% of the responding organizations fall into the $50,000 to $200,000 budget range, 21% fall between $200,000 and $1 million, and 17% have annual budgets over $1 million (including six organizations with budgets over $5 million).

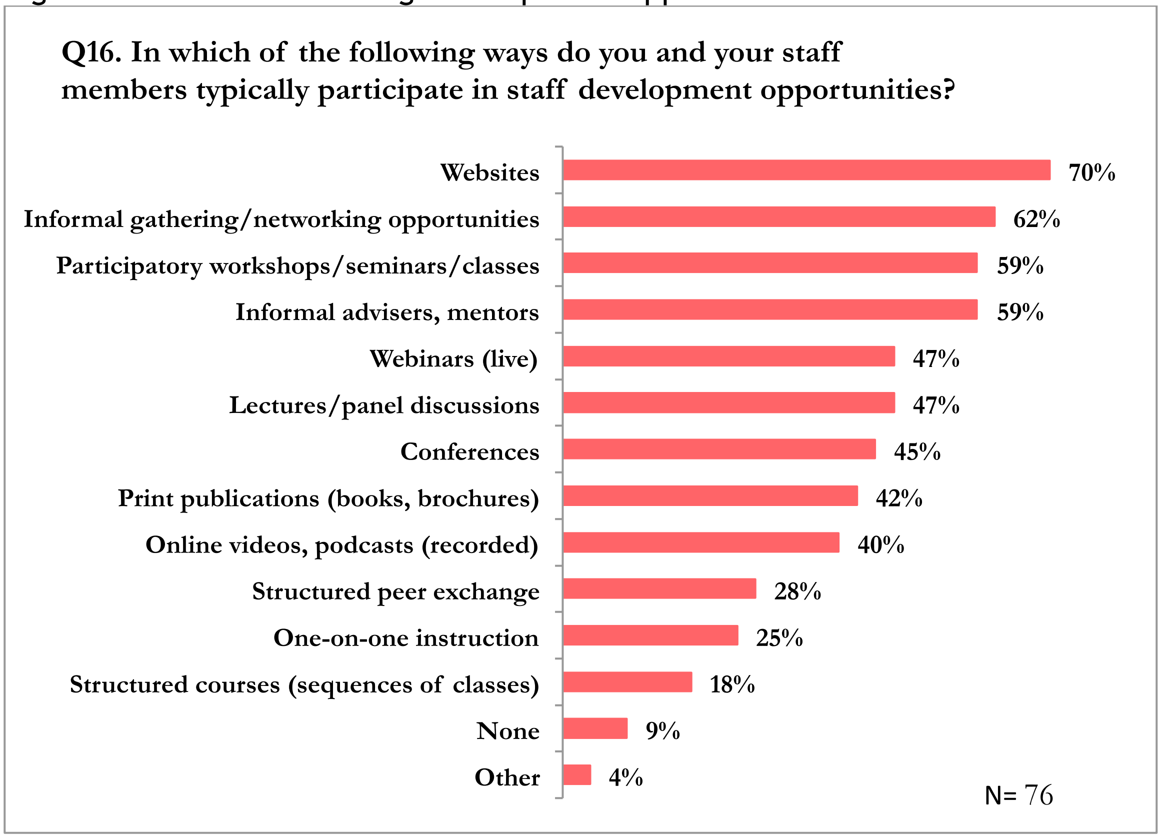
Thirty eight percent of the respondents indicated that their organizations have been in existence for less than five years, but the sample includes considerable variety in this respect, as well. Approximately 20% of the participating organizations fall into each of the age ranges from 6 to 10 years, 11 to 20 years, and 21 to 40 years. About 4% of the responding organizations have been active for over 40 years. The "pyramid-shaped" distribution of organizations in our sample, both in terms of age and budget—with many small and new organizations at the bottom and just a few large and well established institutions at the top—likely reflects the natural distribution of arts/cultural organizations in a given community rather than a sampling bias.

Services Accessed and Assessment of Services

Asked in which ways their organizations' staff members typically participate in staff development opportunities, respondents most frequently cited websites, informal gathering/networking opportunities, informal advisers/mentors, and participatory workshops/seminars/classes (Figure 6).

While three of the top-ranked options refer to informal means of accessing information and learning, several more formal educational formats—workshops, classes, webinars, lectures, panel discussions—also rank quite highly. It seems that staff members at cultural institutions tend to access development opportunities on a one-off or as-needed basis – only 18% of the responding organizations report participation in longer sequences of structured courses among their staff.

Figure 6: Means of Accessing Development Opportunities



A similar pattern emerged, when respondents were asked from which staff development opportunities their staff members had benefitted the most over the past three years in an open-ended question. Informal connections, webinars, conventions and participatory workshops were listed most frequently. The only organization that was repeatedly cited by name for its useful staff development workshops in this question was Greenlights.

As with the individual creatives discussed above, a Support Services Matrix has been prepared based on three components included in the Urban Institute's study of "support structures" for artists: material supports, training/professional development, and community/networking.[3] The matrix lists organizations that provide services to arts/cultural organizations, the range of services they provide, the extent to which the responding cultural institutions have used these services, and how they are perceived. The Service Matrices for both individual creatives and for arts/cultural organizations are located in APPENDIX A.

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[3] Urban Institute, "Investing in Creativity: A Study of the Support Structure for U.S. Artists," 2003. Accessible at http://webarchive.urban.org/publications/411311.html .

The service organizations with the highest levels of participation among responding organizations were:

City of Austin, Cultural Arts Division
Texas Commission on the Arts
Austin Creative Alliance
Greenlights for Nonprofit Success
Texas Accountants and Lawyers for Art

Over 80% of the responding organizations have engaged with a state or local support service providers. The Support Services Matrix for arts/cultural organizations shows that there are a lot of service providers offering similar services and that organizations are utilizing a wide array of services. The City of Austin Cultural Arts Division, Austin Creative Alliance, Texas Commission on the Arts and Greenlights are the most frequently used service providers.

Eleven service providers received mean scores of 4.0 or higher for their significance in the development of the administrative capacity of the responding organizations who have used their services. Some of the service providers with high significance ratings were only accessed by a very small number of arts/cultural organizations in our sample, which may indicate that they serve a small niche very well; however, due to the small number of responses in these cases the high ratings could also result from statistical chance. The list of service providers that received average significance ratings over 3.0 from at least five respondents includes: Austin Community College, Austin Public Library, City of Austin Cultural Arts Division, City of Austin Small Business Program, Greater Austin Chamber of Commerce, Greenlights, Network for Good, SXSW, Texas Commission on the Arts, UT Austin Executive Arts Management Certificate Program.

In general, the respondents are more satisfied with the availability of resources at the state and local levels than with those provided by national service organizations (Table 11); however, in both cases the overall average falls below the midpoint on a five-point scale from "not at all satisfied" to "very satisfied," reflecting some discontent. Similarly, respondents are somewhat dissatisfied with the level of resource and information sharing between arts/cultural organizations in Austin. For all three of these questions, the ratings are lowest from organizations with budgets under $50,000 (mean score 2.3 for local opportunities, 2.0 for national opportunities, and 2.2 for resource sharing).

Table 11: Satisfaction with the Availability and Range of Capacity-Building Opportunities and Information/Resource Sharing

	Mean	**N**
Q13. How satisfied are you with the availability and range of capacity-building opportunities that are available to you and your staff from state and local service organizations?	**2.7**	82
Q14. How satisfied are you with the availability and range of capacity-building opportunities that are available to you and your staff from national service providers?	**2.4**	81
Q18. How satisfied are you with the level of resource and information sharing between cultural organizations in Austin?	**2.7**	76

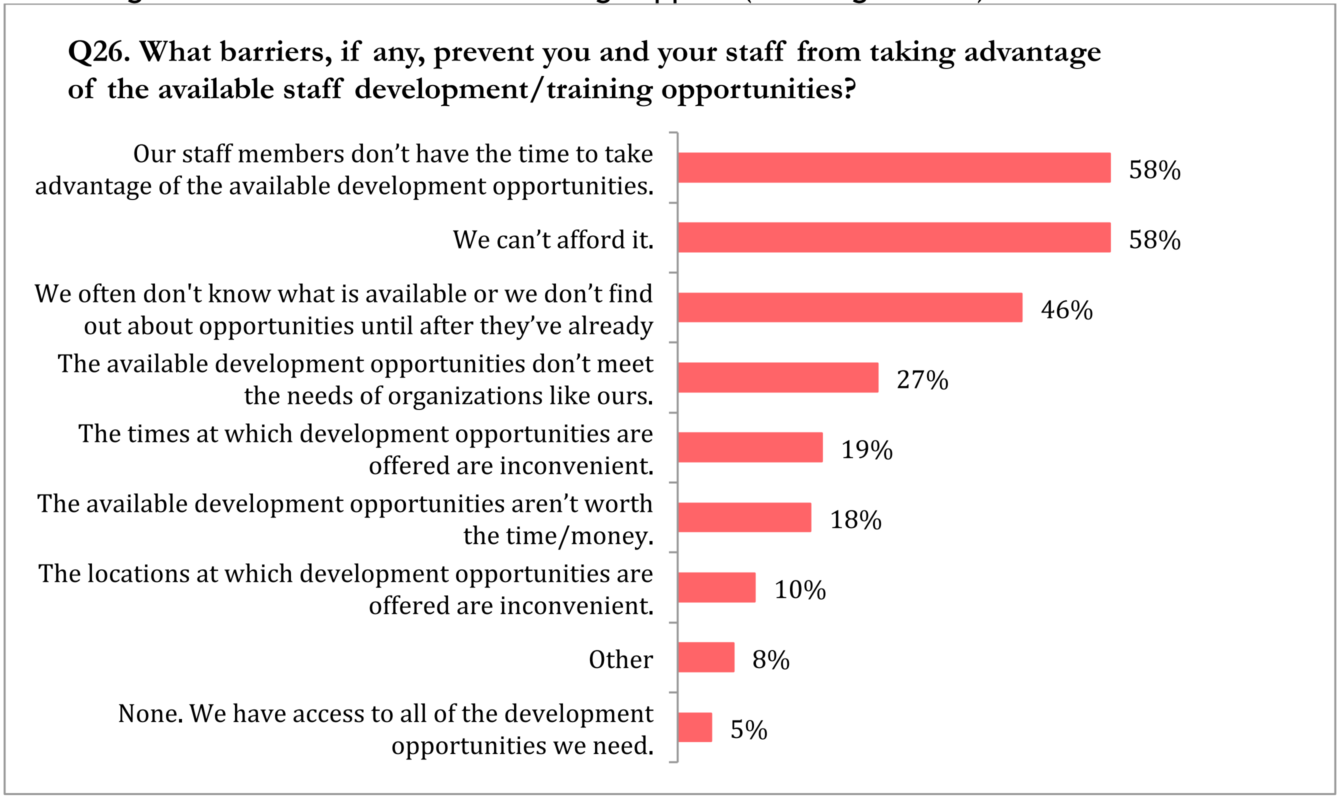
In an overall assessment of the availability and quality of development resources, our survey participants neither agreed nor disagreed with the statement, "In Austin, arts and culture organizations have ready access to programs, information resources, and opportunities that build their organizations' administrative capacity[4] and support their long-term financial stability." On a scale from 1 (strongly disagree) to 5 (strongly agree), the average response to this question was 3.0. Only 22 of the 80 respondents assigned a score of a 4 or 5.

Barriers to Access

In terms of the barriers that organizations face in accessing the available staff development and training opportunities, respondents clearly consider costs, lack of time, and, to a lesser extent, a lack of knowledge about available opportunities as the major concerns. While these three barriers are considered barriers for organizations of all size (cited by over 40% or respondents in all size categories), affordability was a particular concern for organizations with budgets under $200,000. Among those organizations, 63% indicated that they can't afford to participate in the available staff development programs, whereas "only" 50% of the larger organizations cited this as an issue.

[4] In the survey "administrative capacity" was defined as "all aspects of an organizations' work except for its artistic/creative work."

Figure 7: Main Barriers to Accessing Support (all budget sizes)

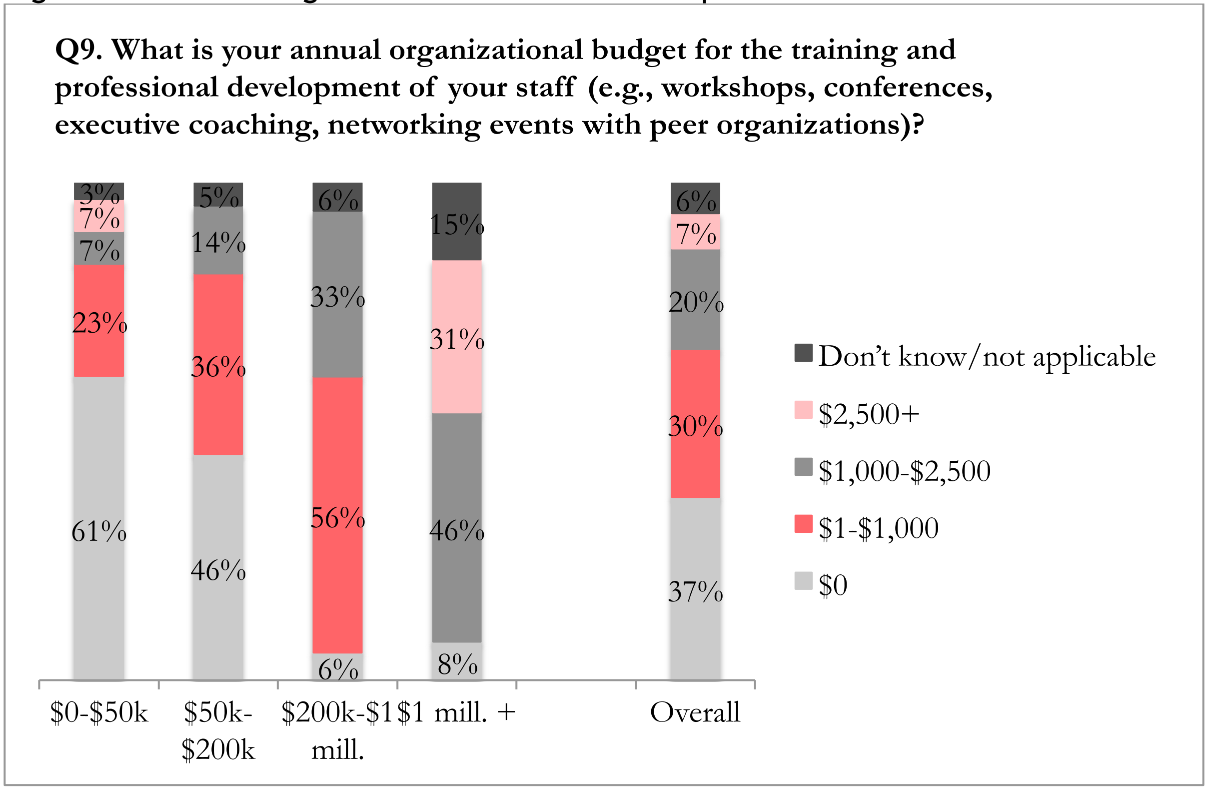


For the largest organizations (budgets over $1 million), finding out about the available opportunities is the most frequently cited barrier. Over two thirds (67%) of the respondents in this size category share this concern, compared to 40% of those from organizations with budgets under $50,000.

Asked whether a) the lack of appropriate capacity-building opportunities or b) the lack of resources—time, money, information about opportunities—to take advantage of existing opportunities is the greater problem, 62% of our respondents indicate that the opportunities are there, but they don't have the resources to take advantage of them. Only 3% identified a lack of opportunities as the primary problem, and 21% indicated that both are problems.

A separate question on the survey asked respondents how much money is allocated for staff training and professional development in their organization's annual budget. As the right hand column in Figure 8 shows, 67% of all organizations that participated in the survey have less than $1,000 allocated for professional development each year. Indeed, the breakdown by the organizational budget size in the columns on the left shows that, 61% of the organizations with annual budgets under $50,000 and 46% of those with budgets between $50,000 and $200,000 report having no budget at all for staff development. Even among the largest organizations—those with total annual budgets over $1 million—most had less than $2,500 allocated for staff development.

Figure 8: Annual budgets for Professional Development



Clearly, there are currently scant resources available within arts/cultural organizations for the continuing education and development of their staff members; however, when asked how they expect their budget for staff training to develop over the next three years, 59% report that they expect their budget to grow, 29% expect it to remain the same, and only 2.4% expect it to decline. If these predictions are accurate, one may expect to see an increased demand for professional development opportunities among arts/cultural organizations in the coming years.

Strengths and Weaknesses of Existing Support Structures

The representatives of arts/cultural organizations who responded to our survey had the opportunity to list what they see as strengths and weaknesses (or "areas for development") of the existing support structures in Austin. With respect to weaknesses/areas for improvement, the most frequent responses among the 62 provided relate to financial matters and business development. The lack of affordable work space, cost of living, lack of funding, insufficient demand for art among the general public, and challenges with the City of Austin's funding process are commonly referenced concerns regarding financial matters. The most frequently cited issues related to business development include insular networks, lack of public awareness of creatives, lack of knowledge about business management, and the need for mentoring. There is some concern that the entities that provide resources don't understand the business needs of creatives.

The strengths that were most identified include the abundance of diverse creative organizations and the willingness among Austin's creatives to share resources and support strong networking and communication. The responses indicate a high degree of community engagement and generally a lot of enthusiasm and support for the arts. Despite increasing rents, the production costs in Austin are still considered pretty low by some. There appears to be general agreement that funding opportunities are available, although grant money tends flow to more traditional organizations and projects. The City of Austin's Cultural Arts Division is recognized as being integral to the success of many new and small arts organizations.

To summarize, there are a lot of diverse support organizations within a tight-knit community, but there is a need for more assistance, particularly in helping organizations with sustainable growth.

The mean score that the representatives of arts/cultural organizations gave to the statement "Austin is a great place for artists and creatives to live an work" is precisely the same as that found in the survey for individual creatives: 3.5, on a scale from 1 to 5. As in the corresponding question on the survey for individuals, Austin's arts/cultural organizations are less certain about the statement "I feel nurtured and supported by the community of artists, creatives, and cultural administrators in Austin," but on average there is still slight agreement. The survey for organizations included a third statement in this panel: "In general, the arts and cultural sector is well supported in Austin." On this question, the respondents tend to disagree with the statement more than they agree with it. As Table 12 shows, the mean score for this statement is just 2.7 for the full sample.

Table 12: Overall Satisfaction Measures

Q19. To what extent do you agree or disagree with the following statements?	**Mean Score by Budget Size**				**Overall Mean**	**N**
	$0-$50k	$50k-$200k	$200k-$1 mill.	$1 mill. +		
Austin is a great place for artists and creatives to live and work.	3.2	3.6	3.5	4.3	**3.5**	75
I feel nurtured and supported by the community of artists, creatives, and cultural administrators in Austin.	3.0	3.3	3.4	3.7	**3.3**	76
In general, the arts and cultural sector is well supported in Austin.	2.6	2.6	2.9	3.1	**2.7**	74

The breakdown by budget size of the respondents' organizations (middle columns in Table 12), reveals that the representatives of larger organizations tend to agree with all three of the statements more than respondents from smaller organizations.

As with the corresponding questions on the survey for individual respondents, the assessment of these statements may be considered summative outcomes measures of the services that are provided, and one may hope that the scores on these measures will rise as services are improved.

Anticipated Needs

Among the representatives of Austin's arts/cultural organizations who responded to our survey, there is strong agreement about the major resource needs that they expect to encounter over the next three years. Financial support tops the list of expected needs by a wide margin (Table 13). Access to suitable work, rehearsal, and performance spaces emerged as the second highest priority, and was of particular concern for small organizations. Among the organizations with budgets under $50,000 the mean rating for space needs was 4.2. Access to professional services, executive training, and access to networks and peers all received mean ratings around 3.6, putting them in the third spot.

Table 13: Expected Resource Needs over Next Three Years (organizations)

Q22. What do you expect your resource needs will be over the next three years?	Mean Priority Rating (1-5)	N
Financial support	4.48	71
Access to suitable work/rehearsal/performance space	3.90	71
Access to professional services provided by third parties (e.g. accounting, marketing, legal services)	3.64	71
Training and development opportunities for our executive/administrative staff	3.61	72
Access to networks/community of peers	3.57	71
Training and development opportunities for our board	3.47	72
Access to equipment and/or materials	3.38	70
Training and development opportunities for our artistic/creative staff	3.32	72
Training and development for our arts education staff	3.14	72

The ratings assigned by organizations provide an interesting contrast to those reported by individuals. For the individual creatives in our study, networking and artistic/creative development rank much more highly than for organizations. For individuals working outside of structured organizations, the relative isolation of their creative pursuits may lead to an increased desire for networking and exchange with peers. The low priority assigned to artistic and creative development within arts/cultural organizations may reflect reluctance among executive staff members to interfere with artistic decisions (even if the artistic leaders might appreciate development opportunities, as suggested by the respondents to our survey for individuals). The survey data is unable to shed light on these hypotheses; however, these discrepancies may provide a useful basis for future discussions about the development of Austin's creative capacity.

In terms of specific subject matters in which the staff members of arts/cultural organizations need to deepen their expertise, our respondents highlight Fundraising/Donor Cultivation, Marketing/Advertising, and Communications/Public Relations (Table 14). It is unclear if these topics are emphasized because the respondents feel that there is currently a lack of competency in these areas within their organizations, or whether their desire to build capacity in these fields reflects their assessment of their organizations' financial needs in the future (seen in Table 13 above).

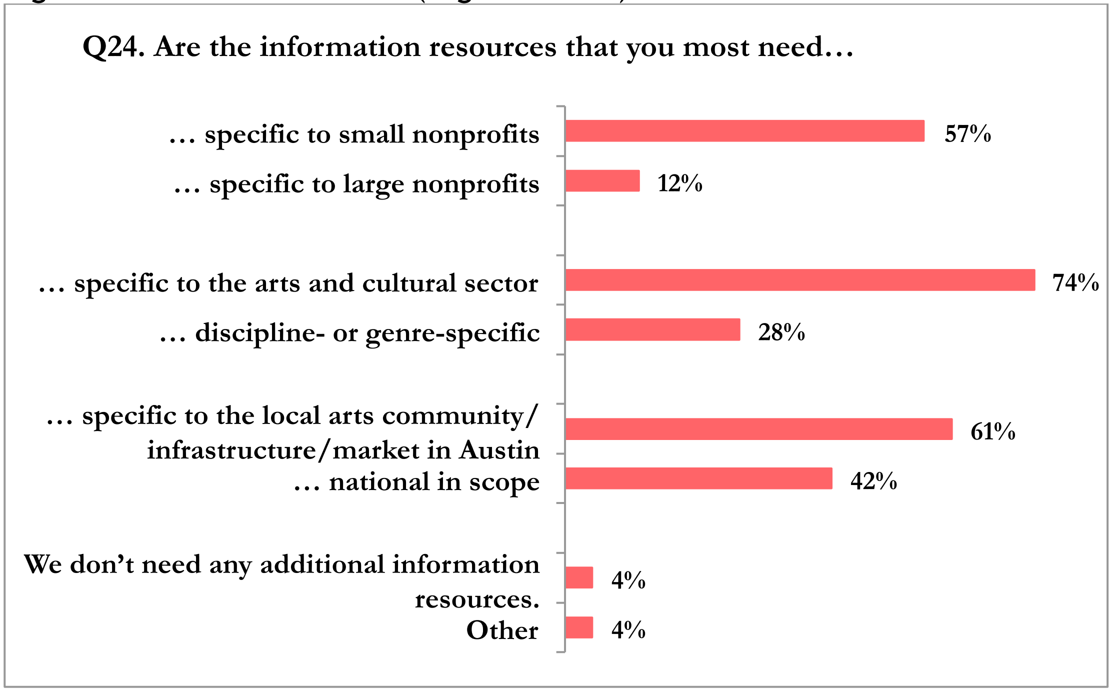
Table 14: Prioritization of Topics For Further Training (organizations)

Q23. In which of the following topics does your staff most need to increase its expertise in order to improve your organization's operations over the next three years?	Mean Priority Rating (1-5)	N
Fundraising/donor cultivation	4.12	69
Marketing and advertising	3.87	70
Communications/public relations	3.85	69
Collaborations/partnerships	3.78	70
Grantwriting	3.68	70
Community outreach	3.66	70
Strategic planning	3.61	70
Web presence and social media	3.52	68
Board development	3.48	70
Leadership development	3.22	70
Volunteer management	3.13	69
Financial management	3.07	70
Legal matters (e.g., copyrights)	2.82	70
Artistic/creative development	2.78	70
Training in arts education programming	2.71	70
Contract management	2.63	70
Human resource management	2.62	70

Among the other high-ranking topics—Collaborations/Partnerships, Grantwriting, Community Outreach, and Strategic Planning—there are some noteworthy discrepancies between the responses from organizations of different sizes (not shown in Table 14). Among the largest organizations—those with budgets over $1 million—the top-ranked topic is Community Outreach (mean rating: 4.11). Meanwhile, Collaborations and Partnerships are among the subjects in which small organizations (budgets under $50,000) most want to develop expertise (mean score: 4.15). This suggests that smaller organizations may be interested in collaborating with larger ones, which, in turn, could benefit from the strong community ties that many smaller organizations have. Again, the survey data alone is unable to provide a complete picture; however, this may be a fruitful avenue to explore in the development of future programs.

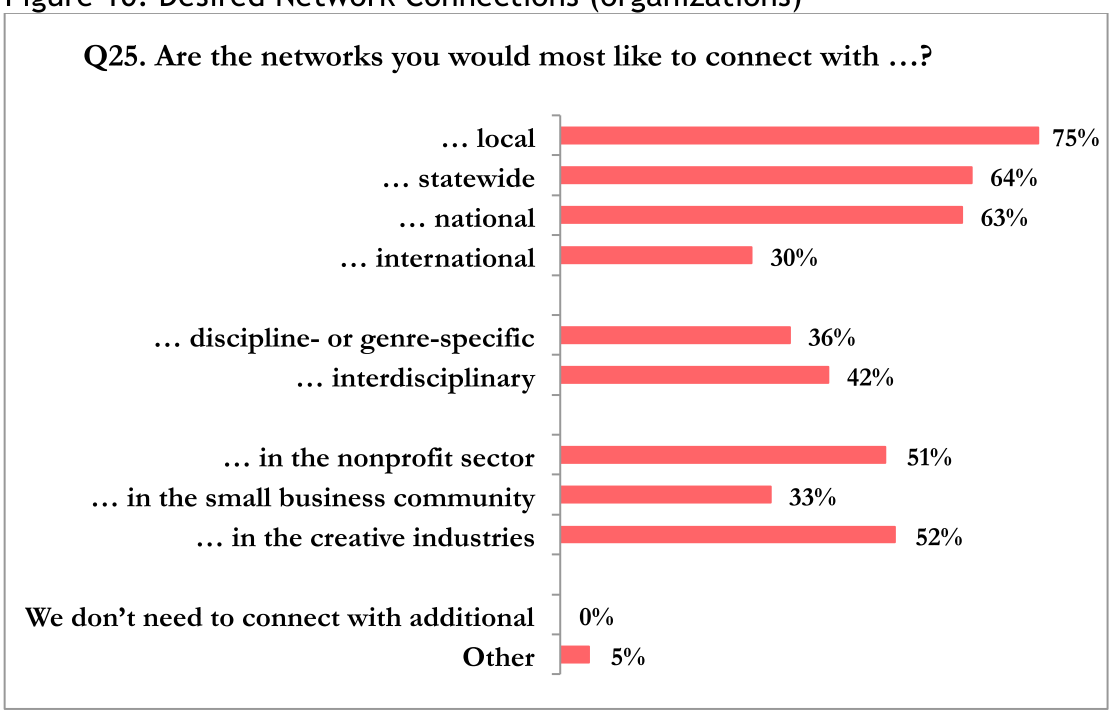
In terms of information resources, representatives of arts/cultural organizations are most interested in accessing information that pertains to the arts and cultural sector as a whole, rather than discipline-specific information. Among organizations with budgets between $50,000 and $200,000, there is also a considerable desire for information that pertains to small nonprofits that aren't necessarily arts related. In the assessment of the full sample of organizational respondents (shown in Figure 9), it appears that there is a greater desire for local information than there is for national. This is driven primarily by the smaller organizations (budgets under $200,000). Among the respondents from organizations with budgets over $200,000, local and national-level information is sought with equal frequency.

Figure 9: Information Needs (organizations)



Similar patterns emerged, when respondents were asked about the networks they most want to connect with. As with the information resources, local connections are most frequently sought overall; however, among the largest arts/cultural organizations, there is greater interest connecting with national networks. National networks are sought by 88% of organizations with budgets over $1 million.

Figure 10: Desired Network Connections (organizations)



Compared to their preferences for information resources, our respondents are less focused on the arts or creative industries when it comes to networking. Connections to networks in the nonprofit sector are sought almost as frequently as those in the creative industries.

Assessment of Specific Program Ideas

As on the survey for individual creatives, the organizations were asked to indicate their level of interest in a set of twelve fictitious program ideas to test their interest in a range of formats and subject matters.

Two of the three programs that received the highest scores from individual creatives also fall into the top-rated programs for organizations: a website listing events and opportunities for creatives in Austin and a funded mentorship program.

Informal exchanges with peers (as in peer study groups) received lower ratings from organizations than from individual creatives, which is consistent with the priority levels that each of these groups assigned to networking (see discussion of Table 13 above). However, the representatives of Austin's arts/cultural organizations share the individual creatives' aversion to formal learning environments with set beginning and ending times.

Table 15: Ratings for Specific Program Ideas

Please rate your level of interest in the following types of support services.	**Mean Rating (1-5)**
A website for professionals in the arts and culture sector. The website is searchable by artistic discipline/creative field (e.g. theater, dance, culinary arts) and lists upcoming events, classes, grants, online discussions, and other opportunities in Austin.	3.81
A funded mentorship or coaching program in which participants get to choose a mentor/coach at another organization who works with them for one year, focusing on building a specific aspect of your administrative capacity.	3.74
A program that allows nonprofits to partner with each other in retaining professional services. For instance, several nonprofits might split the costs of a fulltime accountant or a graphic designer.	3.67
A Creative Resource Center, where creatives and organizations can access up-to-date information on developing products, templates for business plans, contracts, fundraising, etc. in a central location. In addition to books, journals, and reference materials, the center features equipment (computers, scanners, printers) that can be used for a fee.	3.63

Short online videos on specific topics that can be watched (and rewatched) at any time. Topics include: "Managing your Risk: Liability and Insurance," "Filing your 990," "Roles and responsibilities of nonprofit boards." The videos are not specific to the cultural sector.	3.62
A series of hour-long panel discussions on key issues that cultural organizations are facing. The panels consist of a mix of experts in each field and administrators from cultural nonprofits who speak about their personal experiences. The events are held in a central location.	3.41
One-hour webinars geared towards nonprofit managers in the cultural field, in which leaders of major US cultural institutions discuss "secrets of their success."	3.39
Ninety-minute workshops for individuals and organizations working in the arts and cultural sector. The events are held in a central location. Advance registration required (max. attendance 25). Topics include "Public Relations 101: Getting the Media to Tell your Story," Advanced Technology Skills: Website Design and E-newsletters," "Social Media: Do's and Don'ts."	3.30
An incubator program that provides new creative businesses, nonprofits, and individual entrepreneurs with shared office space for a period of three years (participants must pay rent for the office space). As part of the program participants hold weekly meetings to discuss successes and challenges in their work.	3.25
Six to eight-week courses (90-minutes per week) that address a management topic that is of concern to cultural organizations in considerable detail. The courses are led by experts in the field, with occasional guest speakers from local arts and cultural organizations. A general subject such us "Financial Management" is broken into individual classes on specific topics (e.g., on budgeting, bookkeeping, capital reserves), but participants register for and are expected to attend the full series of classes. All classes are held in a central location.	3.19
Peer Study Groups in which nonprofit staff members meet with a small number of peers from other nonprofits of similar size (not necessarily arts related) on an ongoing basis to discuss topics of mutual interest. The groups meet once a month at locations that are chosen by the participants. The discussions might focus on a recent book or publication that is relevant to the participants' work, or a specific question such as "Which nonprofits are using social media effectively and what are they doing?"	3.17
A one-week (5 full days) executive leadership training program for administrators of nonprofit arts and cultural organizations. The program is held in a central location.	3.10

N=66-67

When respondents from organizations were asked, "If you were in a position to add one new resource or program to the existing support structures available in Austin, what kind of resource or program would be most useful to your organization?", the most popular responses included advocacy and public education to build awareness about the value of nonprofit organizations, a centralized location and/or website for resources, and leadership training on advanced management topics. The respondents would also like to see a creative incubator, more mentoring, and more performance spaces.

It seems that arts/cultural organizations want a better understanding of the value that they provide to the public and assistance in articulating that value to the general population.

Key Findings

This section summarizes major findings from the surveys of individual creatives and arts/cultural organizations individually, and then highlights themes that were consistently expressed in both surveys. These results were discussed at a public meeting held on May 20, 2015 and comments from that conversation have been appended to the findings below (see Methodology section above).

Summary of Findings of Individual Creatives

1) Respondents appreciate the variety of support services available but also experience a number of challenges in pursuing their creative work in Austin.

a) There is not enough information about the available resources.

b) The costs of living and working in Austin is a major concern, expressed throughout the survey. Participants in the community meeting unanimously agreed with this finding and consider it to be the primary challenge.

c) The high density of creatives in Austin increases competition and can make it difficult for individuals to gain recognition. Contrary to the survey findings, attendees of the open session liked the high density and did not see this as a hardship.

d) There is insufficient publicity, marketing, and branding for creatives.

e) Demand in the visual art market is anemic. There is a concern that not enough people are motivated to collect or buy art in this market. In the community meeting, attendees felt strongly that the issue is not just about buyers. Rather, it is a systemic issue, resulting from deficiencies in arts education, adult learning, community values, and awareness.

2) Survey participants acknowledge and appreciate the supportive creative ecosystem in Austin.

a) There is an exciting creative 'vibe' and a strong creative community.

b) There is a strong desire to connect with others creatives locally through networking and mentoring.

c) Respondents want to connect with the creative industries rather than the small business community or nonprofit sector. Open session attendees expressed concern about this, since they felt that the term "creative industries" is often used as a buzzword, with little agreement about its meaning.

3) There are some strong recurring themes in the respondents' descriptions of the resources they need to take their creative work to the next professional level.

a) Respondents are most attracted to informal engagement opportunities, such as mentoring, networking, and online resources.

b) Artistic and creative development is the second most highly sought area of learning overall, after getting publicity and critical recognition.

c) They are interested in self-directed learning and support services they can access on their own time via the internet or through resource centers that provide drop-in services.

d) Many creatives believe that continuing to hone their creative skills is more important for the development of their careers than acquiring business management skills. Participants in the public discussion felt strongly that both were necessary, but they also acknowledged that many creatives don't know what they have to learn to be more successful. Further, it was acknowledged that the interest in business management skills is contingent on the desire to earn income, which is not a primary concern for all artists.

e) Comments in the community meeting revealed a strong interest in better access to studio, performance, and workspace. Interestingly, in the survey, future access to suitable space was ranked among a cluster of secondary priorities (albeit at the top of that cluster) across a set of eight resources listed.

4) Austin is considered to be a very good place for artists and creatives to live but it isn't as nurturing as it could be.

a) Respondents only tentatively agree with the statement "Austin is a great place for artists and creatives to live and work" (Mean score: 3.5 out of 5)

b) Respondents even more hesitant to agree that "I feel nurtured and supported by the community of artists and creatives" (Mean score: 3.3 out of 5)

c) Attendees at the public meeting stated that the scores for these questions were higher than they would have provided. They consider it very difficult to feel nurtured and supported as a creative in Austin.

Overall, among the individuals surveyed there is a strong desire for resources that will help them build their creative practices themselves. They desire mentors, networks, centralized resources, self-directed learning opportunities, ongoing creative training, and not least of all recognition for what they do. Yes, they want more funding, access to affordable living and working space, and better pay, but they primarily seem to be looking for services and opportunities that will help them chart their own future.

Summary of Findings of Arts and Cultural Organizations

1) Austin is considered a good place for artists and creatives to live, but support for the cultural sector as a whole is lacking.

a) Respondents only tentatively agree with the statement "Austin is a great place for artists and creatives to live and work" (Mean score: 3.5 out of 5). In the community meeting, there were mixed feelings about this statement. Participants realized that this is not just a matter of government support—arts/cultural organizations need better attendance, sales, and community response to their work.

b) As with the individual creatives, respondents from organizations were more hesitant to agree with the statement "I feel nurtured and supported by the community of artists, creatives and cultural administrators" (Mean score: 3.3 out of 5).

c) On average, respondents tend to disagree with the statement "In general, the arts and cultural sector is well supported in Austin" (Mean score: 2.7 out of 5). Attendees of the open session felt this number was too high, but noted that this is not necessarily a reflection of the City's services for creatives, but of the community as a whole.

d) Overall, small organizations are less satisfied with overall support than larger organziations.

2) The organizations surveyed consider access to financial support and business development resources top priorities.

a) Organizations need ongoing financial support, which often goes to established institutions rather than newer organizations. At the community meeting, participants commented that established, larger organizations are granted funding ahead of smaller and emerging organizations.

b) The topics that organizations most want to build expertise in are directly related the generation of earned and contributed income: fundraising/donor cultivation, marketing/advertising, and communications/public relations.

3) The responding arts/cultural organizations have a preference for self-directed learning opportunities, though they also take advantage of more formal professional development offerings.

a) The most frequently requested learning resources are an online information portal, mentorship programs, and centralized services.

b) Like the individuals surveyed, the arts/cultural organizations are not interested in set starting and ending times for development activities. That said, organizational attendees at the open session emphasized that they do like a mix of opportunities, including some more traditional learning formats.

4) A significant barrier to pursuing learning opportunities is a lack of resources.

a) Staff don't have the time to take advantage of opportunities.

b) The costs of staff development are often prohibitive. Smaller organizations are particularly concerned about this.

c) Like the individual creatives surveyed, organizations often aren't aware of the available resources.

d) Respondents are ambivalent about the statement that "arts and cultural organizations have ready access to programs, information resources, and opportunities that build their administrative capacity and support their long-term financial stability."

In sum, due to tight budgets and limited staff capacities, arts/cultural organizations are often not able to access the development resources they need. Along with stronger financial support (public, philanthropic, and market-based), centralized information resources, flexible learning opportunities, and access to professional services are desired. Since many organizations expect their budgets for staff training to grow over the coming years, there may be an increased demand for such development opportunities in the future.

Overall Findings of the Gap Analysis

While the needs of individual creatives and arts/cultural organizations are not necessarily linked to each other, comparing the results of the two surveys with each other reveals some striking similarities:

- *There is strong interest in self-directed learning.* Both individual creatives and staff members at arts/cultural organizations want to choose how, when and where they access information and learning resources.
- *Accessing resources and learning opportunities is challenging.* Respondents in both surveys miss out on a lot of opportunities, either due to the costs or because they just don't know where to find out about them.
- *There is a desire for centralized services.* Both individuals and organizations expressed interest in a place where creatives can access information, resources, and networks, for a website which hosts information such as a directory of creative services, a data base of resources and services, and a calendar of professional development events.
- *Affordability is an issue in Austin.* Living and working in Austin is challenging for creatives, due to the costs of living, housing, and work/studio space.

While the similarities may outweigh the differences, individual creatives appear to be more concerned with networking (a top priority) and the ongoing development of their creative skills, whereas the representatives of Austin's arts/cultural organizations are more concerned with developing skills that are related to revenue generation.

A summary of all research findings as well as recommendations for future action will be delivered in July 2015.

Appendix A

SUPPORT SERVICES MATRIX
Creative Individuals

INDIVIDUAL CREATIVES											
						HEARD of SERVICES		PARTICIPATED in SERVICES		SIGNIFICANCE OF SERVICES	
	Material Supports			Training & Professional Development	Community Networking	# of responses	% of sample	# of responses	% of sample	# of responses	1= Unimpor tant; 5 = Very Important
SUPPORT ORGANIZATION	space, equipment, materials	Employee benefits	Funding, grants			708		618			
LOCAL/REGIONAL:											
City of Austin Cultural Arts Division	no	no	yes	yes	yes	404	57%	147	24%	141	3.6
City of Austin History, Nature Division	no	no	no	yes	no	133	19%	24	4%	40	3.4
City of Austin Music and Enter Division	no	no	no	yes	yes	134	19%	6	1%	6	3.3
City of Austin, Small Business Program	yes (meeting)	no	no	yes	yes	228	32%	36	6%	33	3.4
Austin Community College - Center for Community Based and NonProfit Organizations	no	no	no	yes	yes	296	42%	38	6%	35	3.3
Austin Community College - Cont Ed	no	no	no	yes	yes	540	76%	76	12%	74	3.1
Austin Creative Alliance	yes	yes(insurance)	yes (fiscal sponsor)	yes	yes	394	56%	89	14%	85	3.4
Austin Film Society	yes	no	x	yes	yes	542	77%	110	18%	103	3.1
Austin Free-Net	no	no	free programs	yes	no	82	12%	7	1%	7	3.7
Austin Gay and Lesbian Chamber	no	no	no	yes	yes	177	25%	7	1%	7	2.2
Austin Music Foundation	yes(meeting)	no	no	yes	yes	191	27%	16	3%	16	2.8
Austin Public Library	yes (meeting)	no	no	yes	yes	621	88%	187	30%	174	2.9
BIG Austin	no	no	yes	yes	no	97	14%	27	4%	25	3
Capital View Arts	yes	no	yes	yes	yes	44	6%	7	1%	5	2.6
Generous Art	yes	no	yes(through exhibits)	yes	yes	122	17%	36	6%	31	2
Greater Austin Asian Chamber	yes(p'ship with People Fund	no	no	yes	yes	170	24%	5	1%	4	2
Greater Austin Black Chamber	no	no	no	yes	yes	171	24%	3	1%	2	3
Greater Austin Chamber of Commerce	no	no	no	yes	yes	340	48%	9	2%	9	3
Greater Austin Hispanic Chamber	no	no	yes	yes	yes	196	28%	1	0%	0	0
Greenlights for Nonprofit Success	no	no	no	yes	yes	139	20%	25	4%	23	3
Imagine Art	yes	no	no	yes	yes	166	23%	19	3%	19	3.4
International Game Developers Assoc	no	no	no	yes	yes	30	4%	2	0%	2	3
Network for Good - Nonprofit 911	no	no	no	yes	no	27	4%	0	0%	0	0
PeopleFund	no	no	yes	yes	yes	107	15%	11	2%	10	2.6
RISE Austin	no	no	yes	yes	yes	88	12%	9	1%	9	3.4
SCORE	no	no	no	yes	yes	101	14%	17	3%	15	3
SXSW education and tech panels	no	no	yes	yes	yes	576	81%	102	16%	96	3.2
Texas Accountants and Lawyers for Art	no	no	no	yes	no	144	20%	17	3%	16	3
Texas C-Bar	no	no	no	yes	no	28	4%	5	1%	3	4.3
Texas Commission on the Arts	no	no	yes	yes	yes	420	59%	41	7%	39	3.4
Texas Film Commission	no	no	yes	yes	yes	428	60%	36	6%	33	3.4
Texas Music Office	no	no	no	no	yes	185	26%	17	3%	16	2.5
Indus Entrepreneurs Austin TiE)	yes(office space)	no	yes	yes	yes	13	2%	3	0%	3	4
U of T - Exec Arts Mgmt Cert Program	no	no	yes(part scholarships)	yes	yes	180	25%	13	2%	12	3.7
U of T - Gaming Assoc Cert Program	no	no	no	yes	yes	44	6%	2	0%	2	2.5
U of T - Professional Develop Ctr	no	no	no	yes	no	120	17%	9	1%	9	3.4
VSA Texas	yes(gallery space)	no	yes	yes	yes	103	14%	18	3%	18	3.8
Writers League of Texas	no	no	no	yes	yes	152	21%	23	4%	23	3.6
OTHER WRITE IN:											

SUPPORT SERVICES MATRIX
Creative Individuals

AIGA						9	1%	3	0%		4
Austin Visual Arts Association	yes(display space)	no	no		yes	11	2%	9	2%		4.3
Big Medium	yes (rental space)	no	no		yes	7	1%	6	1%		4.5
Creative Arts Society						6	1%	6	1%		4.4
ScriptWorks						6	1%	7	1%		4.6
NATIONAL:											
AIGA	no	no	no	yes	yes			69	11%		
American Alliance of Museums	no	no	no	yes	yes			18	3%		
American Institute of Architects	no	no	no	yes	yes			20	3%		
Americans for the Arts	no	no	no	yes	yes			26	4%		
Dance USA	no	no	no	yes	yes			4	0%		
Industrial Designers Society of Americ	no	no	yes	yes	yes			4	0%		
League of American Orchestras	no	no	no	yes	yes			0	0%		
Naitonal Endowment for the Arts	no	no	yes	yes	yes			58	10%		
Naitonal Guild for Community Arts	no	no	yes	yes	yes			1	0%		
Opera America	no	no	no	yes	yes			6	1%		
Theatre Communications Group	no	no	yes	yes	yes			24	4%		
OTHER WRITE-IN:								61	14%		
Creative Capital	yes	no	yes	yes	no			3			

SUPPORT SERVICES MATRIX
Arts and Cultural Organizations

ARTS/CULTURE ORGANIZATIONS									
						PARTICIPATED in SERVICES		**SIGNIFICANCE OF SERVICE**	
	Material Supports			**Training & Professional Development**	**Community Networking**	**total #**	**% of sample**	**# of responses**	**1= Unimpor tant; 5 = Very Important**
SUPPORT ORGANIZATION	**space, equipment, materials**	**Employee benefits**	**Funding, grants**			84			
LOCAL/REGIONAL:									
City of Austin Cultural Arts Division	no	no	yes	yes	yes	51	61%	45	3.9
City of Austin History, Nature Division	no	no	no	yes	no	3	4%	2	3.5
City of Austin Music and Enter Division	no	no	no	yes	yes	4	5%	3	5
City of Austin Small Business Program	yes (meeting)	no	no	yes	yes	9	11%	8	3.9
Austin Community College - Center for Community Based and NonProfit Organizations	no	no	no	yes	yes	8	10%	7	3.6
Austin Community College - Cont Ed	no	no	no	yes	yes	4	5%	4	4.3
Austin Creative Alliance	yes	yes(insurance)	yes (fiscal sponsor)	yes	yes	33	39%	31	2.9
Austin Film Society	yes	no	x	yes	yes	5	6%	4	2.3
Austin Free-Net	no	no	free programs	yes	no	1	1%	1	5
Austin Gay and Lesbian Chamber	no	no	no	yes	yes	2	2%	2	3.5
Austin Music Foundation	no	no	no	yes	yes	5	6%	3	3.3
Austin Public Library	yes (meeting)	no	no	yes	yes	11	13%	10	3.5
BIG Austin	no	no	yes	yes	yes	5	6%	4	2.3
Capital View Arts	yes	no	yes	yes	yes	2	2%	2	3.5
Generous Art	yes	no	yes(through exhibits)	yes	yes	3	4%	3	2
Greater Austin Asian Chamber	no	no	no	yes	yes	2	2%	2	1.5
Greater Austin Black Chamber	no	no	no	yes	yes	4	5%	3	3
Greater Austin Chamber of Commerce	no	no	no	yes	yes	7	8%	6	3.8
Greater Austin Hispanic Chamber	no	no	yes	yes	yes	2	2%	2	3.5
Greenlights for Nonprofit Success	no	no	no	yes	yes	25	30%	22	3.7
Imagine Art	yes	no	no	yes	yes	2	2%	2	5
International Game Developers Assoc	no	no	no	yes	yes	2	2%	2	3
Network for Good - Nonprofit 911	no	no	no	yes	no	5	6%	5	3.6
PeopleFund	no	no	yes	yes	yes	8	10%	8	3.3
RISE Austin	no	no	yes	yes	yes	4	5%	3	4.5
SCORE	no	no	no	yes	yes	5	6%	4	3.5
SXSW education and tech panels	no	no	yes	yes	yes	14	17%	11	3.5
Texas Accountants and Lawyers for Art	no	no	no	yes	no	15	18%	14	2.6
Texas C-Bar	no	no	no	yes	no	3	4%	3	3.7
Texas Commission on the Arts	no	no	yes	yes	yes	35	42%	32	3.4
Texas Film Commission	no	no	yes	yes	yes	3	4%	2	4.5
Texas Music Office	no	no	no	no	yes	4	5%	4	4.5
Indus Entrepreneurs Austin TiE)	yes	no	yes	yes	yes	0	0%	0	0
U of T - Exec Arts Mgmt Cert Program	no	no	no	yes	yes	6	7%	6	3.7
U of T - Gaming Assoc Cert Program	no	no	no	yes	yes	1	1%	1	5
U of T - Professional Develop Ctr	no	no	no	yes	yes	3	4%	2	4
VSA Texas	no	no	yes	yes	yes	12	14%	10	2.6
Writers League of Texas	no	no	no	yes	yes	1	1%	1	0
OTHER WRITE IN:									
Leadership Austin	no	no	no	yes	yes				
NATIONAL:									
AIGA	no	no	no	yes	yes	2	3%		
American Alliance of Museums	no	no	no	yes	yes	3	4%		
American Institute of Architects	no	no	no	yes	yes	2	3%		
Americans for the Arts	no	no	no	yes	yes	7	9%		
Dance USA	no	no	no	yes	yes	4	5%		
Industrial Designers Society of Americ	no	no	yes	yes	yes	0	0%		
League of American Orchestras	no	no	no	yes	yes	0	0%		
Naitonal Endowment for the Arts	no	no	yes	yes	yes	22	28%		
Naitonal Guild for Community Arts	no	no	yes	yes	yes	3	4%		
Opera America	no	no	no	yes	yes	0	0%		
Theatre Communications Group	no	no	yes	yes	yes	9	11%		
OTHER WRITE-IN:									
Network of Ensemble Theatres	no	no	yes	yes	yes				