



BUILDING AUSTIN'S CREATIVE CAPACITY **Creative Sector Needs Assessment**

REPORT COMPILATION:

Executive Summary
Interim Report
Gap Analysis Report
Conclusions and Recommendations
Community Focus Group Summary Report

Report to the

City of Austin
Economic Development Department
Cultural Arts Division

By Christine Harris and John Carnwath

Acknowledgements

This research would not have been possible without the many artists, creatives, and cultural professionals, who contributed their thoughts to this project in focus groups and by taking our survey. In addition, the authors would like to thank the members of the steering committee (listed below) for their thoughts and feedback, and the staff of the City of Austin’s Economic Development Department and Cultural Arts Division—in particular, Janet Seibert, Vicky Valdez, Sylnovia Holt-Rabb, Meghan Wells, and Lani Golstab—for their support.

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Introduction

Building Austin's Creative Capacity: Report Compilation is a collection of the five reports produced by WolfBrown and Christine Harris Connections in the process of conducting the needs assessment for the Austin Creative Sector 2015-2016.

- “Building Austin’s Creative Capacity: **Executive Summary**” provides an overview of the research that was conducted and presents key findings and recommendations
- “Building Austin’s Creative Capacity: **Interim Report**” consists of a progress update and the topline results of the survey data
- “Building Austin’s Creative Capacity: **Gap Analysis Report**” lays out 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
- “Building Austin’s Creative Capacity: **Recommendations and Conclusions**” summarizes the research process and the assessment of creative sector service needs, proposes recommendations and suggested outcome measures
- “Building Austin’s Creative Capacity: **Community Focus Groups**” presents an overview of the three community conversations with minority groups that were held to discuss the survey findings and assesses to what extent participants feel that the survey accurately reflected their concerns, or whether they face resource and service needs different than those mentioned by the survey respondents

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BUILDING AUSTIN'S CREATIVE CAPACITY: CREATIVE SECTOR NEEDS ASSESSMENT

Report to the

City of Austin
Economic Development Department
Cultural Arts Division

By Christine Harris and John Carnwath

March 28, 2016

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Executive Summary

Introduction

Austin has recognized that the lines between the work 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. The recommendations from the Create Austin 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 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 the confluence of several planning efforts at the moment make this an ideal time to step back and complete a comprehensive analysis of the existing support services, service gaps, and overlaps.

The objectives of this Creative Sector Needs Assessment are to

- a) gather input from Austin's nonprofit arts/culture organizations and individual creatives to identify their support needs;
- b) identify gaps between the support services needed and those currently offered by service providers in Austin;
- c) prepare a report of the findings and a set of recommendations to guide CAD's future economic support and capacity building services.

Throughout this study, the term “creatives” is used to refer to individuals, 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 either derive income or attempt to derive income from their creative activity (whether in the for-profit or nonprofit sector).

The term “arts/cultural organizations” refers to nonprofit and public sector arts, culture, and heritage organizations, including 501(c)3 organizations, state and municipal institutions, and entities that are affiliated with universities.

A Steering Committee was formed to oversee this project. Committee members contributed their deep understanding the cultural landscape of Austin, provided input on the project strategy, assisted in developing the research approach, helped engage their community contacts in the research, and commented on a draft of the gap analysis. In addition, some Steering Committee members reviewed the survey protocols and beta-tested the online survey. The members of the Steering Committee are listed on the acknowledgements page.



Four reports were submitted to the City of Austin as part of the *Building Austin's Creative Capacity* creative sector needs assessment:

- An Interim Report (consisting of a progress update and the topline results of the survey data) was submitted to CAD on March 31, 2015
- “Creative Sector Needs Assessment: Gap Analysis Report” was submitted to CAD on June 22, 2015
- “Building Austin's Creative Capacity: Recommendations and Conclusions” was submitted on February 18, 2016.
- “Building Austin's Creative Capacity: Community Focus Groups” was submitted to CAD on February 18, 2016.

This executive summary provides an overview of the research that was conducted as part of *Building Austin's Creative Capacity* and presents key findings and recommendations. The individual reports are available from CAD upon request.

Research Methodology

In order to identify gaps in the available support services for creatives in Austin it was necessary to examine the availability and effectiveness of existing services on the one hand, and the support needs of creatives and arts/cultural organizations on the other.

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.

Respondents were recruited through public announcements, flyers, emails, social media, and networks. Self-identified individual “creatives” (see definition above) had to be over 18 and reside within the Austin-Round Rock MSA to participate in the survey. For the survey of organizations, respondents had to be qualified representatives of an arts/culture organization located within the Austin-Round Rock MSA (one per organization).

A total of 528 individual creatives completed the full survey. An additional 190 individuals provided usable data for at least one section of the survey. The survey for organizations received 67 complete responses and 19 usable partial responses. A breakdown of the demographics of the survey respondents can be found in the full report (“Creative Sector Needs Assessment: Gap Analysis Report”).

In addition to the online survey, CAD hosted an open community meeting and a series of focus groups with members of the Hispanic, African American, and Asian Communities, which provided opportunities for qualitative input and “ground truthing” of the survey results.

The open community meeting was held on May 20, 2015. CAD issued an open invitation to individual creatives and nonprofit arts organizations to attend this meeting through its website, email blasts, social media, and outreach through networks. Twenty community members took advantage of the opportunity to discuss the research with CAD staff and the research consultants. After a brief presentation that outlined the composition of the survey sample and major findings, attendees were divided into small roundtables to discuss “what rings true or and what doesn’t” in the findings and prioritize the findings for further action.

To address concerns that Austin’s communities of color might be underrepresented in the survey results, CAD decided to host focused community conversations with Hispanic/Latino, Asian American, and African American creatives. The three focus groups were held on September 30 and October 1, 2015, and each was attended by between nine and fifteen creatives from the respective communities. CAD staff asked leaders in each community to recommend participants for the convenings and sent personal invitations to individuals who were nominated. The participants received a copy of the survey findings (*Building Austin's Creative Capacity: Gap Analysis Report*) in advance of the focus groups, and the discussions were held in a facilitated roundtable format.

Summary of Survey Findings

Assessment of Existing Resources

- a) Respondents appreciate and take advantage of the variety of support services available in Austin, but they nonetheless report considerable barriers in accessing the resources they need (many of which are described below).
- b) Both individual creatives and representatives of arts/cultural nonprofits report that there is not enough information about the available support resources, so that they often miss opportunities they would like to take advantage of.
- c) Among individual creatives, there is a sense that insufficient marketing, publicity, and branding makes it difficult for creatives to get noticed. A compounding factor in this may be that the amount of activity in Austin makes it challenging to have desired publicity levels for all creatives and events.
- d) Staffs of nonprofit arts organizations say that they don’t have the time to take advantage of opportunities because of their workload.
- e) The costs of organizational staff development are often prohibitive. Smaller organizations are particularly concerned about this.

Assessment of Austin

- a) Respondents agree that there is an exciting creative ‘vibe’ and a strong creative community in Austin.
- b) The costs of living and working in Austin are a major concern, particularly among individual creatives.
- c) Individual creatives in the visual arts expressed concern that not enough people are motivated to buy art in Austin, so that demand is weak in the local market.
- d) Individual creatives and representatives of Austin’s arts/cultural nonprofits 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), and they are even more reserved in expressing their agreement with the statement “I feel nurtured and supported by the community of artists and creatives” (Mean score: 3.3 out of 5).
- e) On average, representatives of arts/cultural nonprofits 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). Moreover, they 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.” Small organizations are generally less satisfied with the overall level of support than larger organizations. (These questions were not asked of individual creatives.)

Service Preferences

- a) Among individual creatives, there is a strong desire to connect with other creatives locally through networking and mentoring. They are more eager to pursue connections within the creative industries than in the small business community or the nonprofit sector.
- b) Both individual creatives and staff members from arts and cultural nonprofits are most attracted to informal and self-directed learning opportunities, such as mentoring, networking, peer learning, and online resources, which don’t have set starting and ending times. Nonetheless, many also take advantage of more conventional educational formats, particularly among the respondents from organizations.
- c) There is considerable interest in centralized information and professional development resources, whether those are online or physical resource centers that provide drop-in services.
- d) On average, individual creatives consider opportunities to continue honing their creative skills more important for the development of their careers than learning business management skills.

- e) As their top priority, arts/cultural nonprofit organizations list ongoing financial support. Some respondents noted that such support tends to go to established institutions rather than newer organizations.
- f) The topics that organizations most want to learn about are directly related the generation of earned and contributed income: fundraising/donor cultivation, marketing/advertising, and communications/public relations.

Overall, among the individuals who participated in the survey 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.

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), they desire centralized information resources, flexible learning opportunities, and access to professional services. 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.

While the needs of individual creatives and arts/cultural organizations are not necessarily linked to each other, there are a number of similarities between the two:

- There is strong interest in self-directed learning.
- Accessing resources and learning opportunities is challenging.
- There is a desire for centralized services.
- Affordability is an issue in Austin.

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.

Creative Community Focus Groups

This project included face-to-face meetings with members of Austin's creative community. The purpose of these sessions was to contextualize the survey findings and solicit feedback from communities that were under-represented in the survey, in particular from Hispanic/Latino, Asian American, and African American creatives. CAD extended an open invitation to all members of the creative community to discuss the survey findings in an open community meeting in May, 2015. More focused discussions were held with representatives of each of the ethnic communities listed above in the fall of the same year.

Open Community Meeting

The discussion at the open community meeting generally supported the survey findings, but in many instances the attendees' comments added nuance to the interpretation of the results. The individual creatives in the open session shared the concerns about the crowded marketplace that are seen in the survey results; however, they believe that increasing the visual art market in Austin is not a marketing issue, per se, but the result of diminished arts education, community values, and lack of awareness about the arts. While participants agreed that more skill development was necessary among Austin's creatives, they went a step further, saying that many creatives don't even know what they have to learn to be successful. Finally, attendees at the open session were more pessimistic about the state of support for Austin's creative sector than the survey indicated.

As with the individual creatives, the representatives of nonprofit arts organizations who participated in the open session generally agreed with the survey's findings. Responding to the survey, the representatives of organizations cautioned against overcorrecting away from program formats with fixed starting and ending times and urged service providers to ensure a healthy mix of traditional face-to-face and online learning formats. These participants shared the individual creatives' belief that Austin is less supportive than the survey results suggest. Finally, the executives and staff members of nonprofits at the meeting were very concerned about the financial resources available to small and mid-sized arts organizations in Austin.

Cultural Community Focus Groups

In general, the participants in the three cultural community focus groups (Hispanic/Latino, Asian American, African American) agreed with the results of the survey. They did, however, add some significant contextual information and voiced some alternative opinions on what needs to be done to support the vitality of the cultural community.

In terms of existing resources, the focus group participants expressed that they often don't have the time or money to take advantage of the available programs. The programs need to be very practical and low cost. In all three of the focus groups, participants talked about the difficulty of accessing spaces for rehearsals, teaching, exhibitions, and

performances. Their first priority would be to have more access to their cultural centers (the Emma S. Barrientos Mexican American Cultural Center, Asian American Resource Center, and George Washington Carver Museum and Cultural Center) but they also want to present their work more widely across Austin. In the area of existing resources, issues about financial support loom much larger for the community members who participated in the focus groups than the survey results indicate. People of color in Austin's creative community feel disconnected from mainstream funding sources and therefore find themselves unable to serve their communities as deeply as they would like.

With respect to service and resource preferences, the focus group participants expressed a desire for more self-directed learning opportunities, which is consistent with the survey findings. However, they also remarked that having a mix of different program and learning formats is desirable. Discussants were primarily interested in early career skill development, and some requested more individual, personalized services. The Hispanic/Latino group, in particular, requested more programs in Spanish. All three focus groups were very enthusiastic about the idea of a central 'hub' where creatives of all disciplines and backgrounds could access services and build their professional networks.

While the focus group participants appreciate the creative 'vibe' in Austin, they were even less enthusiastic than the survey respondents and the attendees at the open community meeting about the level of support that the creative community receives in Austin. The focus group participants were in total agreement with the survey participants that the cost of living and working in Austin is a major concern. Discussants commented on needing a larger market for their work, the difficulty of attracting audiences, and the lack of support for their cultural contributions to Austin.

In summary, the key takeaways from the focus groups were the desire for:

- more intensive and extensive use of their respective cultural centers;
- more opportunities to interact with and learn from other creatives both within their cultural communities and in the wider creative community of Austin;
- better understanding of how they serve their communities within the philanthropic sector; and
- more basic infrastructure support (money, staff assistance, services support, fundamental business education).

Recommendations

The city seems to be at a 'creative crossroads,' with several large strategic creative projects underway both at CAD and the Music and Entertainment Division, increasing numbers of creatives moving to Austin, and a city that is growing rapidly. CAD and many other service providers are offering a wide variety of support services and resources for the creative sector. This is an opportune time to optimize the effectiveness of those resources and leverage the available assets into an ecosystem that is highly efficient, not just in serving the current needs, but also in supporting the continued growth of a sustainable and vibrant creative economy.

Many of the shortcomings of Austin's support structures for creatives result from a lack of communication within the sector. There are lots of opportunities and resources, but they are not well coordinated with each other and both individual creatives and arts/cultural organizations find it difficult to stay informed about the many programs offered by various service organizations and support networks. By establishing tighter relations and two-way dialogue with the creative community as a whole (in particular with underserved portions of the community), coordinating the available resource providers, and improving communications about the available resources, CAD has an opportunity to increase its impact on the creative field considerably with relatively modest levels of investment. Ideally, CAD would pursue these opportunities in conjunction with the Music and Entertainment Division, the History, Arts and Nature Program in the Parks and Recreation Department, and the Small Business Program.

A. Establish Ongoing Creative Sector Dialogue

The conversation that was initiated through the *Building Austin's Creative Capacity Creative Sector Needs Assessment* and the comprehensive list of organizations that provide services to the creative community that was generated for this project constitute significant steps towards greater communication and coordination among the service providers. Furthermore, CAD reached out to a number of organizations, hubs, and networks in the cultural community to assist with the dissemination of the survey. The value of these lists of contacts and partners should not be underestimated. All efforts should be made to capitalize on the work that has been done in these areas by facilitating communications, continuing to build these alliances, and making these directories available to the sector. The first two recommendations relate directly to these findings.

Recommendation A.1: Convene all of the service providers listed in the survey on a regular basis (quarterly or semi-annually) to review program details, discuss opportunities for partnerships, limit duplicative efforts, and to ensure that programs are meeting the needs of today's creative sector.

- Develop a taxonomy of support services to uniformly classify the services that are currently available.
- Develop a system of coding support programs based on eligibility criteria, disciplinary focus, experience level (introductory, intermediate, advanced), and form of engagement (online video tutorial, hands-on workshop, panel discussion, etc.).
- Assess the availability of development opportunities in areas identified as top priorities.
- Establish a unified publicity campaign with common language to increase the awareness of service opportunities within the creative sector.

Recommendation A.2: Continue to engage networks and build alliances across the creative sector. The survey demonstrated that CAD is highly respected and that its support programs are greatly appreciated by practitioners in the field. However, the challenges faced in soliciting participation from certain portions of the creative community suggest that there are limitations to CAD's current networks. Both the survey and the community meetings that were held as part of this study suggest that there is demand for more ongoing dialogue between CAD and the creative sector at grassroots levels.

A useful model for this type of dialogue may be found in the focus groups that CAD convened with Hispanic/Latino, Asian American, and African American creatives. All of the focus group participants were appreciative of the opportunity for open dialogue with CAD and were eager to continue the conversation. The success of these meetings highlights the need to engage with the creative community through multiple communication channels, since no single channel (e.g., online surveys, program evaluations, social media, town hall discussions) will reach all segments of Austin's creative sector.

Such convenings will engage networks and help build alliances across the sector.

- Schedule regular creative sector dialogues on specific topics, alternating between events held at CAD and events hosted by community partners.
- Establish expanded drop-in "office hours" of the sort that CAD offers through the Cultural Funding Programs and Public Places Program.
- While some of these opportunities should be open to the public, others might convene specific groups (such as major philanthropies, small arts and cultural nonprofits, art collectors, etc.).
- Provide opportunities for cross-sector dialogue that bring together nonprofit organizations, for-profit creative businesses, and individual creatives.
- Explore how CAD's existing social media outlets can be leveraged to increase capacity and relevance.
- Gather contact information and build databases of creative community members.

B. Refine Program Delivery Strategy

In commissioning this Gap Analysis, CAD sought to identify how it could better serve the creative sector through its programming. While CAD is among the most highly utilized service providers and survey respondents ranked the significance of its services in advancing their careers and organizations quite highly, the research suggests that increasing awareness and accessibility could further extend CAD's impact.

Recommendation B.1: Expand online services and programming. Such online resources would not only meet the demand for low-cost information, they would also fulfill the desire for more self-directed learning and informal development opportunities. They could be presented in a variety of formats—articles about best practices, interviews with practitioners, instructional videos, webinars, full online courses, etc.—to suit the content and the needs of various audiences.

Recommendation B.2: In developing online resources, CAD should consider content areas that are highly sought after by individual creatives and arts/cultural organizations. Based on the Gap Analysis, this would include publicity and gaining critical recognition for individuals, and fundraising/donor cultivation, marketing/advertising, and communications/public relations for organizations.

Recommendation B.3: Many participants in this study indicated a desire for mentoring in their professional and creative development. To meet the need for this type of peer-to-peer professional connection, CAD could consider sponsoring a guided mentoring program.

C. Develop Centralized Online Resource

Both among individual creatives and arts/cultural organizations there is a strong desire for a central web-based resource that serves as a repository for all programs that offer support services for the creative sector. This is echoed in the findings about major barriers that prevent people from accessing the services they need: many individuals and arts/cultural organizations don't know what resources are available or where to find out about them.

Recommendation C.1: Build a centralized online resource database for services and programs available across all providers. In effect, create a ‘knowledge hub’ of services available for the creative economy. This should be separate from any current website, easily branded and regularly promoted. This resource could include the following:

- Information on all of the training and development programs offered by local service providers that can be searched and filtered by content area, format, etc. as outlined in Recommendation A.1 above.
- A variety of on demand resources, such as videos, webinars, and lectures, on topics such as fundraising, marketing, financial planning, career development, etc. These can be collated and cataloged from a variety of sources. Rather than just relying on links, CAD may develop original content or negotiate agreements with other websites and organizations to republish their existing resources.
- Curated lists of links to resources in areas such as financing, legal matters, and permitting for activities in the creative sector.
- User-generated content such as job postings.

There are several different ways in which such a centralized source of information could be implemented, ranging from a simple directory of service providers to a complex, interactive website, with all of the features outlined above. It may be possible to ‘franchise’ a website (both the architecture and portions of the content) from another community and adapt it to local needs. Building this resource will take staff time and web development expertise. CAD may be able to co-manage this resource with other service providers in the region, rather than maintaining it on its own. Some useful examples of such web resources might include the Chicago Artists Resource (www.chicagoartistsresource.org), NYFA Source (Source.NYFA.org), and the much more rudimentary ArtsLinks page of the Georgia Council for the Arts (gaarts.org/resources/arts-links).

D. Continue to Address Access to Space – performance, housing, studio

This is a perplexing and longterm issue. Concerns about the affordability of living and working in Austin have been prevalent for some time, and is perceived as a major threat to the creative community in Austin. The topic of affordability and cost of living was listed as a key challenge in the 2015 *Austin Music Census*, and the findings from the Gap Analysis Report largely echo those of the *Survey of Artists’ Space Needs and Preferences* and the *Survey of Arts, Creative and Cultural Organizations and Businesses* conducted by Artspace Projects, Inc. and Swan Research and Consulting in 2013. In addition to the concerns about space availability, participants in the open community meeting spoke of zoning, permits, and other city regulations as impediments to promoting their businesses. CAD understands the seriousness of these issues.

Austin is currently undergoing a Land Development Code Revision.¹ As part of the process, CAD is reviewing the zoning codes and other relevant city regulations to reveal any impediments to creatives finding suitable space for housing, work, or the display and sale of their work. CAD has contributed language to the Long-Range CIP Strategic Plan to set up potential public/private partnerships in the development of artist live/work spaces, incubators, and cultural districts for future bond elections. The Imagine Austin Creative Economy Priority Program is currently contributing thinking towards the Land Development Code Revision, reimagining city development tools for creative sector development, and generating a white paper on creative space development. CAD's partnership in the ArtPlace America grant-funded project, thinkEAST is creating a template for future creative developments across the City.

In addition to these efforts, the following recommendation would be a relatively low-cost undertaking that might compliment existing strategies.

Recommendation D.1: The City should review the available software options for a searchable online directory of spaces that are available for creative activities. Providing a centralized online inventory of available spaces would add value to a comprehensive online resource (Recommendation C). While this recommendation will not do anything to reduce the costs of accessing space in Austin, development and promotion of such a site could help people on the margins of the creative community find out about available spaces and help maximize the utilization of the existing space resources.

E. Develop an Integrated Vision and Physical Space to Unify Austin's Creative Sector

Building upon the individual measures discussed above, Recommendation E outlines a holistic vision that has the potential to absorb some of the growing pains that Austin's booming creative sector is experiencing and secure the city's competitive advantage in this field.

Recommendation E1: CAD should consider developing a physical gathering space for the creative sector that would function as a real-world compliment to the online information hub described under Recommendation C1. The development of this integrated resource center would constitute a strong, visible statement of the City's commitment to its creative community, and co-branding the physical and virtual resource centers would establish a unified presence within Austin's creative sector.

Every creative sector planning effort since the 2003 Mayor's Task Force Economy/Creative Economy Subcommittee has recommended an incubator-like space for creatives. However, this proposal goes far beyond a mere incubator space for a

¹ www.austintexas.gov/codenext

limited number of creative businesses or organizations. A physical space that is dedicated solely to supporting the creative community with knowledgeable staff members, classrooms, reference materials, free wifi, computers, printers, copiers, and perhaps performance and/or exhibition space and a café would go above and beyond the support structures seen in other cities, and make a bold statement of support. Activities that could be available in the physical space include: regular meeting hours with City of Austin (CAD, Small Business Development, etc.) and other service provider staff, computer access to the centralized online resource, professional development workshops and seminars, meeting rooms, and other services as developed by CAD and the community. This gathering space would make manifest the centralized online resource as well as provide opportunities for networking, mentoring and peer learning. It would be important for this space to be specialized and advanced enough to be useful to professional arts administrators, but also welcoming to emerging creatives and even engaged hobbyists.

This recommendation is similar to a suggestion articulated in *The Austin Music Census: A Data-Driven Assessment of Austin's Commercial Music Economy* (Titan Music Group, LLC, May, 2015). The report suggested a key policy consideration be the *creation of a commercial music industry hub with affordable co-working space*. This focus on one commercial industry along with co-working space is materially different from the recommendation for an integrated creative sector resource. However, if CAD pursues this idea, it would make sense for the city to discuss potential development of both facilities together.

The creative sector has made it very clear that it believes there is room for improvement in how nurtured and supported it feels by the greater Austin community. Co-branding the virtual and physical space would directly improve that perception and, more importantly, provide Austin's creative sector with access to each other and resources that potentially would be unparalleled around the country. This in turn will continue to build the excellent reputation of the creative sector in greater Austin and increase the sector's economic value.



CREATIVE SECTOR NEEDS ASSESSMENT: GAP ANALYSIS REPORT

Report to the
City of Austin
Economic Development Department
Cultural Arts Division

By John Carnwath and Christine Harris

April 2015
(revised June 22, 2015)

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 and final report for this project.

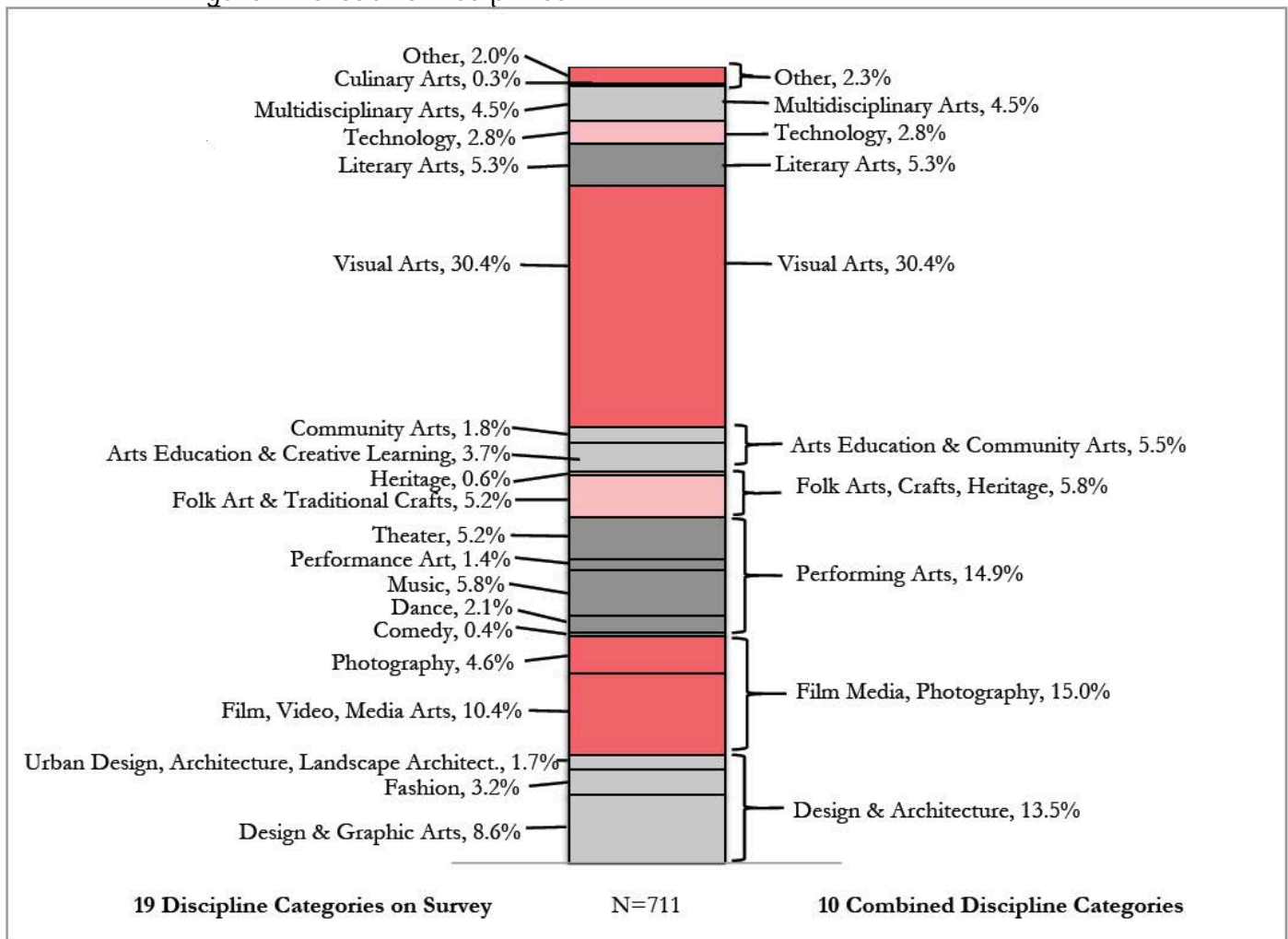
Survey of Individual Creatives

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%

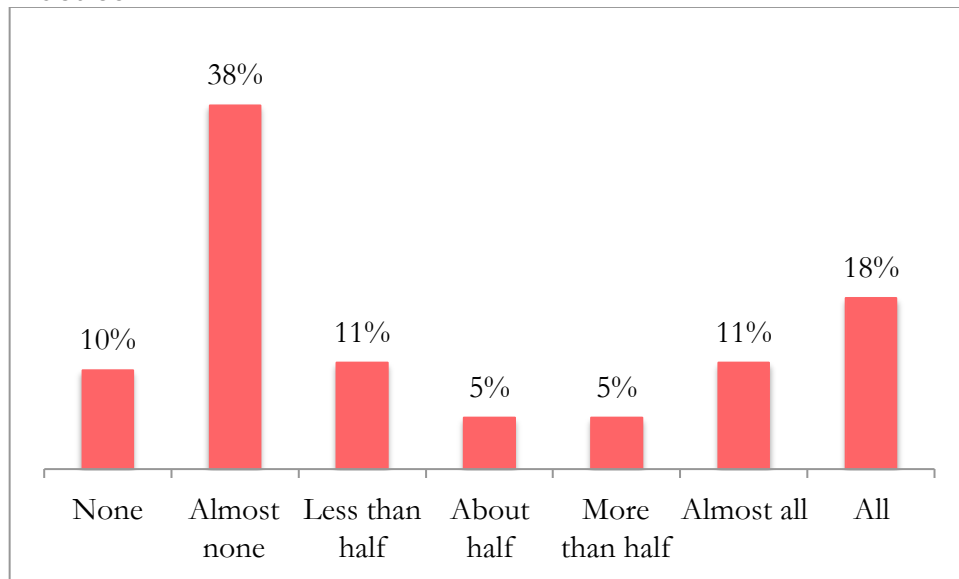
*Source: The Nielsen Company (2015 estimates)

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 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)

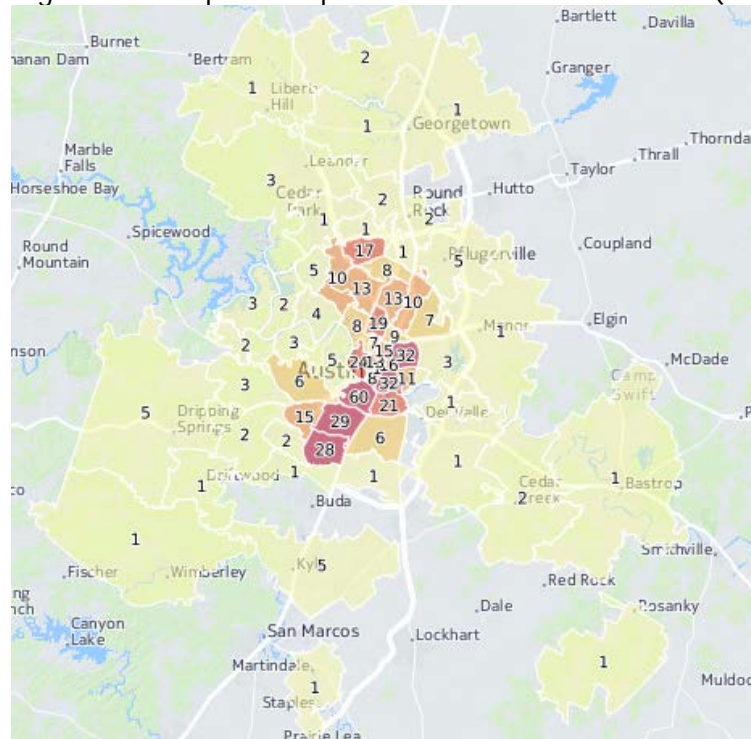
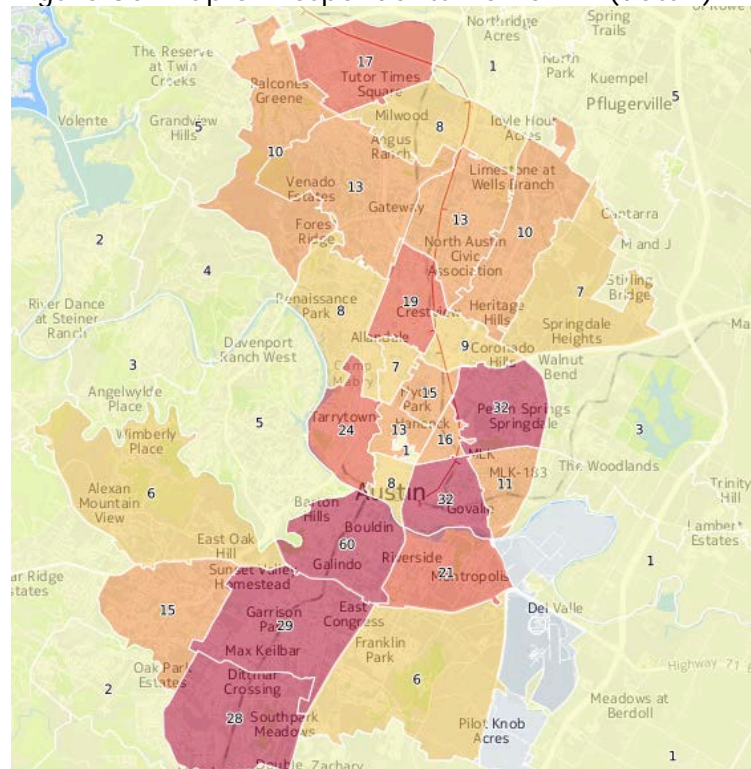


Figure 3b: Map of Respondents Home ZIP (detail)



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	Dribbble - 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 to 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 any 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)

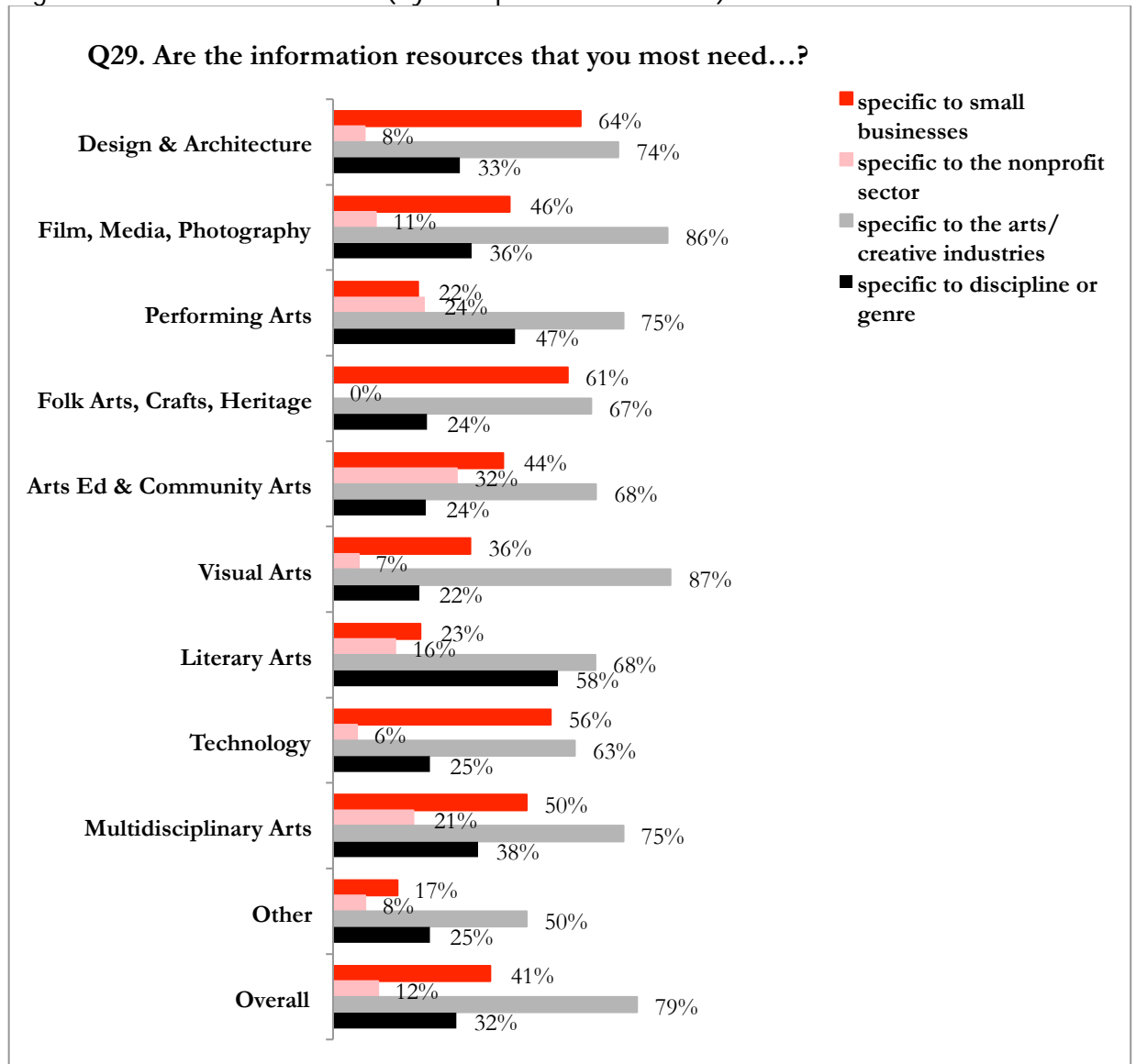
Q28. Which of the following topics do you most need to learn about in order to advance your creative practice over the next three years?	Mean Priority Rating (1-5)	N
Getting publicity and critical recognition	4.11	530
Artistic/creative development	3.71	516
Web presence and social media	3.58	523
Collaborations/partnerships	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 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.

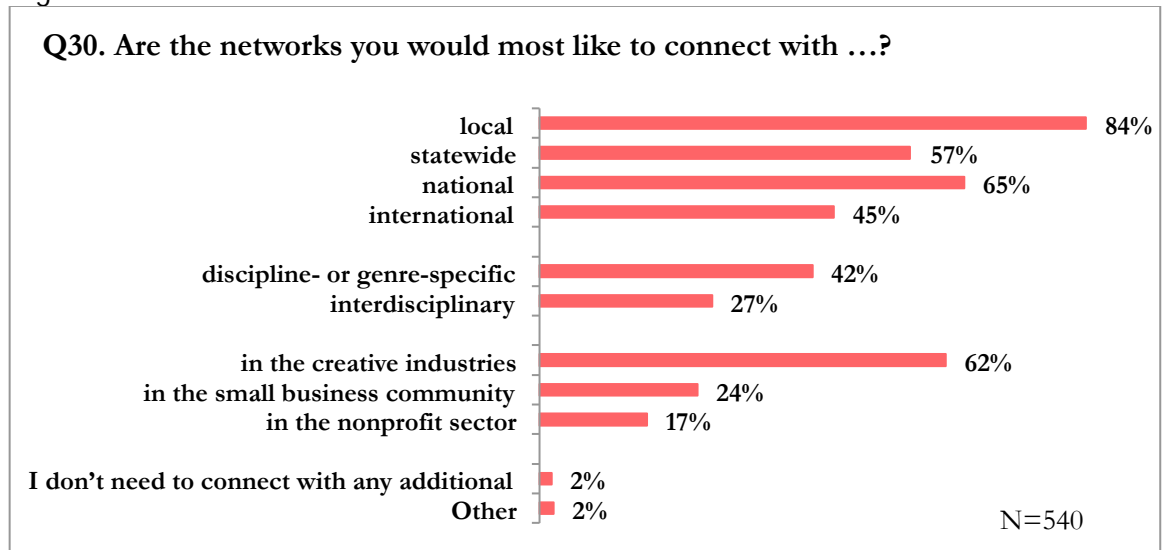
In the design, media, arts education, literary, and technology fields there is a preference for national-level information, while the opposite is true in the performing, visual, and multidisciplinary arts, folk arts, crafts and heritage.

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 as “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 of 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).

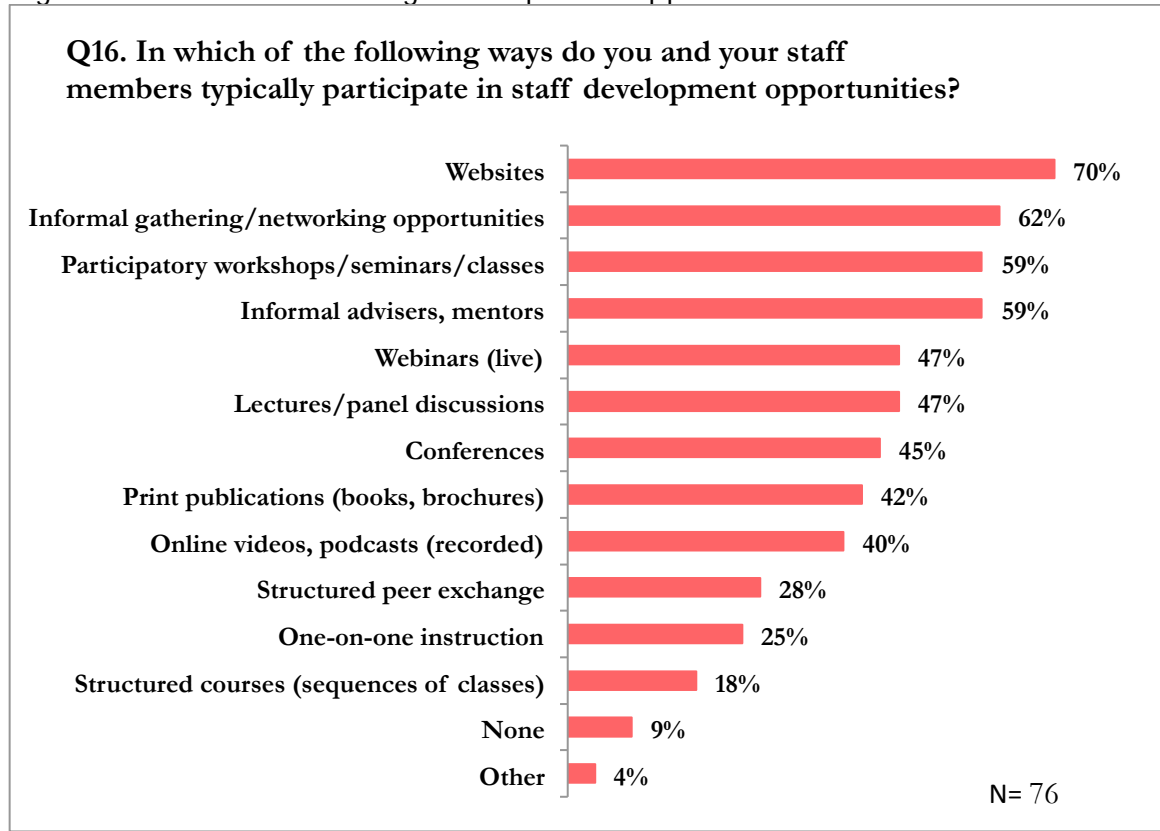
Thirty eight percent of the respondents indicated that their organizations have been in existence for less than five years, but the sample includes considerable variety in this respect, as well. Approximately 20% of the participating organizations fall into each of the age ranges from 6 to 10 years, 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.

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

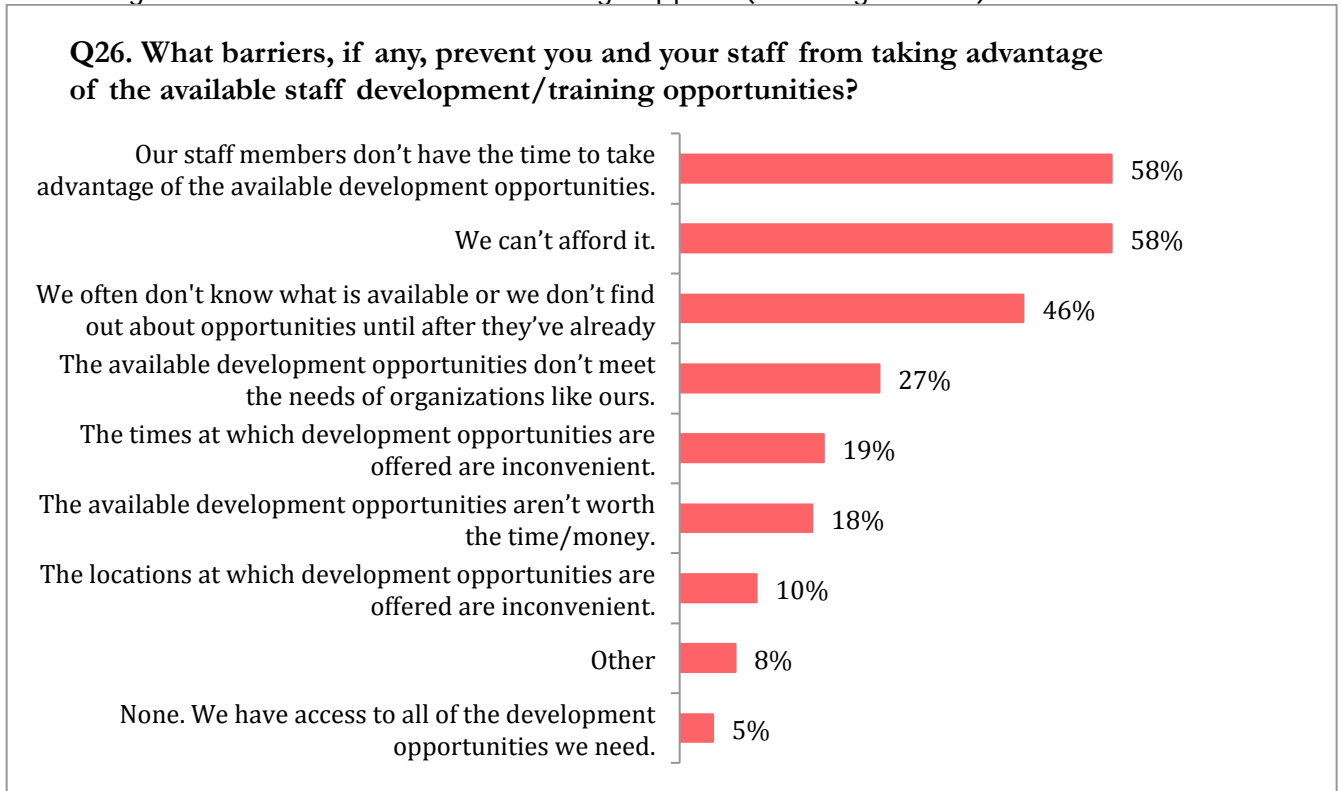
In an overall assessment of the availability and quality of development resources, our survey participants neither agreed nor disagreed with the statement, “In Austin, arts and culture organizations have ready access to programs, information resources, and opportunities that build their organizations’ administrative capacity⁴ 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% of 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)

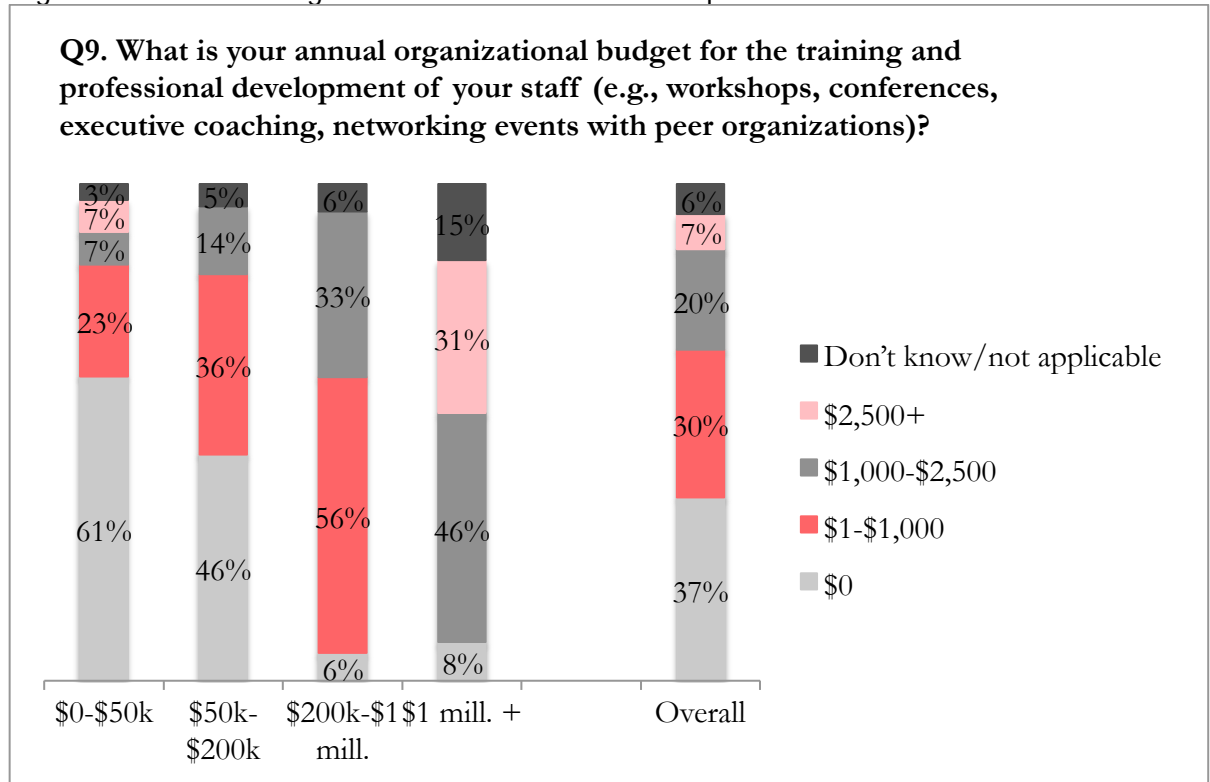


For the largest organizations (budgets over \$1 million), finding out about the available opportunities is the most frequently cited barrier. Over two thirds (67%) of the respondents in this size category share this concern, compared to 40% of those from organizations with budgets under \$50,000.

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 to 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 and 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).

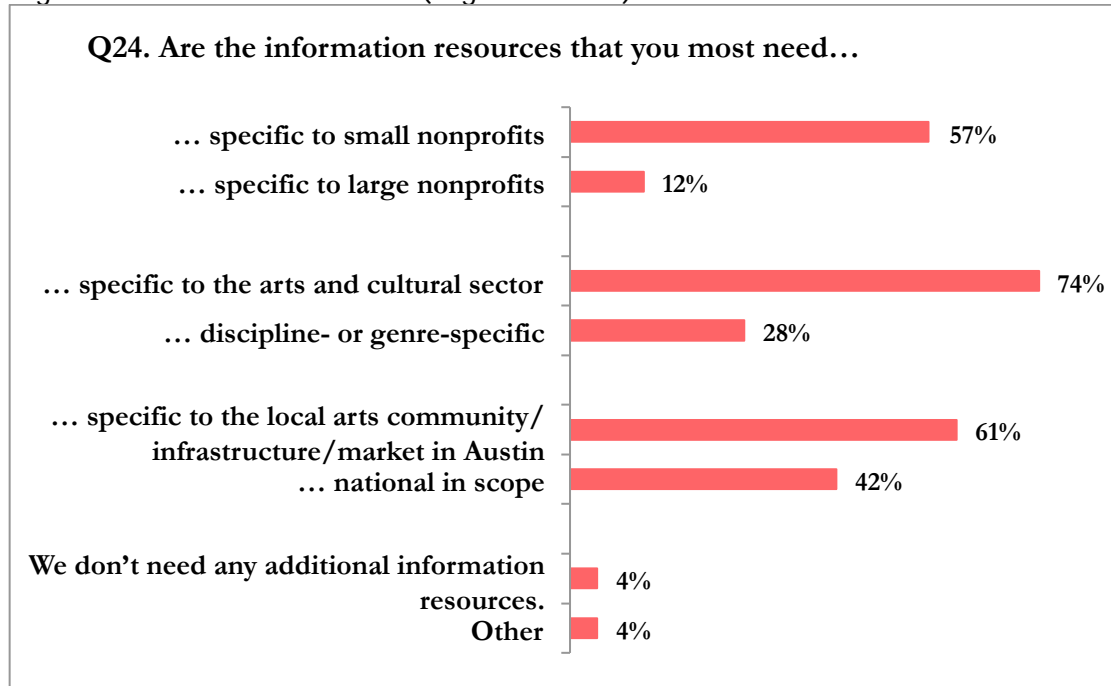
Table 14: Prioritization of Topics For Further Training (organizations)

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.

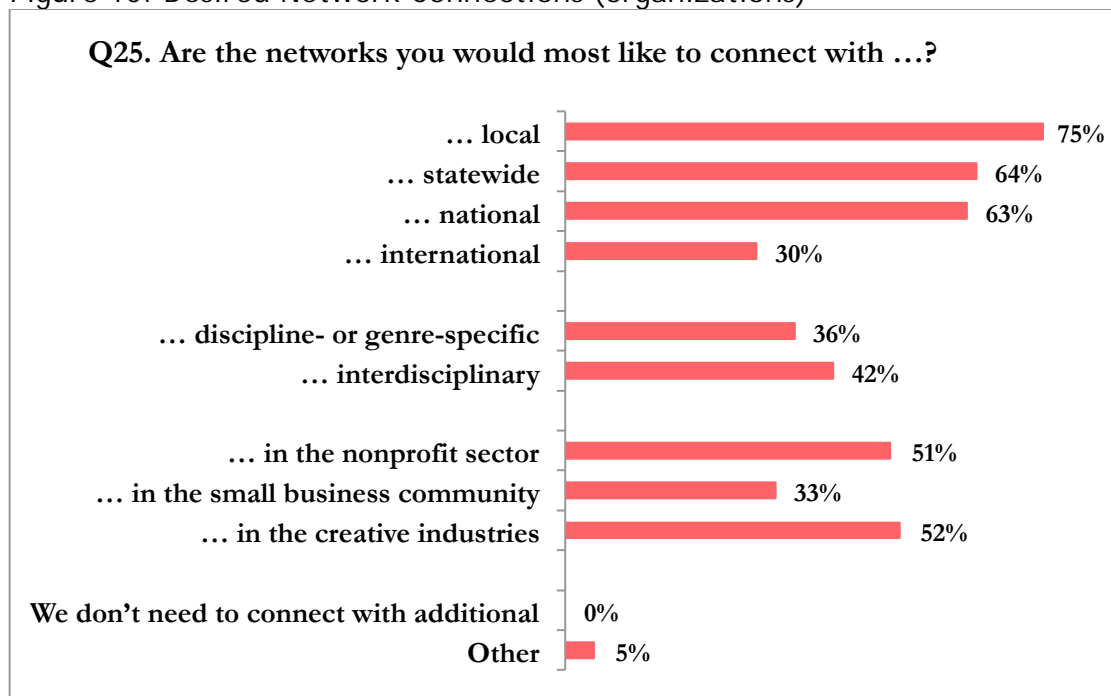
In terms of information resources, representatives of arts/cultural organizations are most interested in accessing information that pertains to the arts and cultural sector as a whole, rather than discipline-specific information. Among organizations with budgets between \$50,000 and \$200,000, there 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 as “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 organizations.

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

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 America	no	no	yes	yes	yes			4	0%		
League of American Orchestras	no	no	no	yes	yes			0	0%		
National Endowment for the Arts	no	no	yes	yes	yes			58	10%		
National 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= Unimportant; 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				



BUILDING AUSTIN'S CREATIVE CAPACITY:
Creative Sector Needs Assessment

CONCLUSIONS AND RECOMMENDATIONS

Report to the

City of Austin
Economic Development Department
Cultural Arts Division

By Christine Harris and John Carnwath

February 18, 2016

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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,¹ 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 an imperative to examine the support structures that reinforce creatives’ and arts/cultural organizations’ ability to work and thrive in Austin. By increasing its understanding of the support needs and the available resources, the City and community will be able to invest in the continued growth and long-term sustainability of the creative sector.

The recommendations from the Create Austin Cultural Master Plan, the Imagine Austin Plan, and the mission and goals of the Economic Development Department’s 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 objectives of the Creative Sector Needs Assessment are to a) gather input from Austin’s nonprofit arts and culture organizations and individual creatives to identify their support structure needs, b) identify any service gaps between the support structure services needed and those provided by Austin nonprofit service providers, c) prepare a report of the findings and a set of recommendations for implementing support and capacity building services and structures to be delivered by the City, primarily through CAD. Early in the project it was also deemed important to provide information that other organizations can use as they develop programs for the creative sector.

Throughout this study, the term “creatives” is used to refer to individuals, 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 either derive income or attempt to derive income from their creative activity.

¹ TXP, Inc., “The Economic Impact of the Creative Sector in Austin – 2012 Update,” 2012, available at https://austintexas.gov/sites/default/files/files/creative_sector_impact2012.pdf

The term “arts/cultural organizations” refers to nonprofit and public sector arts, culture, and heritage organizations, including 501(c)3 organizations, state and municipal institutions, and entities that are affiliated with universities.

A Steering Committee was formed to oversee this project. Committee members contributed their deep understanding the cultural landscape of Austin, provided input on the project strategy, assisted in developing the research approach, helped engage their community contacts in the research, and commented on a draft of the gap analysis. In addition, some Steering Committee members reviewed the survey protocols and beta-tested the online survey. A listing of all Steering Committee members is included in the final report. The project benefited greatly from their input.

The scope of work is divided into five segments: Strategy Process, Survey Development, Support Services Gap Analysis, Open Community Meeting, and Key Findings and Recommendations.² The research methodology is described below.

This document is the third of three reports being submitted to the City of Austin as part of the *Building Austin's Creative Capacity* creative sector needs assessment. The first was an Interim Report, submitted to CAD on March 31, 2015, which includes the topline results of the survey data. The second was the Gap Analysis Report, submitted to CAD on June 15, 2015.

This third report, Conclusions and Recommendations, summarizes the research process and the assessment of creative sector service needs, and proposes recommendations. An overview of the research methodology is followed by a summary of key findings, which leads to as set of recommendations and suggested outcome measures.

² Since completing the initial drafts of this report, the scope has been expanded to include three focus groups with minority groups (African Americans, Hispanics/Latinos, and Asian Americans) to ensure that their perspectives are accurately reflected in the research. These focus groups will be the subject of a separate report, *Building Austin's Creative Capacity: Community Focus Groups*, and findings will be incorporated in the final analysis.

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 creatives (individuals who are managing their own creative careers or small businesses) are likely to differ from those reported by arts/cultural organizations (nonprofits and publicly funded institutions), 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. Flyers were distributed, the Steering Committee and targeted organizations reached out to their constituents, and broad networks of personal contacts were informed through various means. 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.

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 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, CAD hosted an open community meeting on May 20, 2015. CAD issued an open invitation to individual creatives and nonprofit arts organizations to attend this meeting, whether or not they had completed the survey. The purpose of this meeting was to receive feedback on the main findings of the survey and thereby 'ground truth' the survey results with practicing members of the creative community.

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.

While the 20 participants in the open community meeting cannot be considered representative of Austin’s creative sector, the open format of the session allowed participants to explain their positions in detail and provide contextual information, which helps illuminate (and in some cases question) the survey data. Comments from the open session have been incorporated throughout this report to add greater nuance to the analysis; however, it should be kept in mind that in some cases these comments express the views of a small number of individuals.

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.

Summary of Findings of Individual Creatives

I1) 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 are 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) There is insufficient publicity, marketing, and branding for creatives. One reason for this may be that the amount of activity in Austin makes it challenging to have desired publicity levels for all creatives and events.
- d) Research participants registered concern that demand for purchasing art is weak and not enough people are motivated to collect or buy art in this market.

I2) 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.

I3) 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, peer learning, and online resources.
- b) They are interested in self-directed learning and support services they can access on their own time via the internet or through centralized resource centers that provide drop-in services.
- c) Many creatives believe that continuing to hone their creative skills is more important for the development of their careers than acquiring business management skills.

I4) 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 were 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)

Participants in the open community meeting were generally supportive of survey's findings but they did register valuable additional comments. They liked the high density of creatives in Austin and even though the crowded market makes it difficult for individuals to stand out, they did not see it as a hardship. Regarding the perceived weakness of the visual arts market in Austin, they argued that the issue of purchasing more art is a systemic one based on diminished arts education, community values and lacking awareness. Attendees at the open community meeting were suspicious of the high-level of interest in connecting with networks in the "creative industries" reported in the survey, because they believe that most people don't really know what the term means and whom it includes. Although it didn't emerge as a top priority in the survey, participants at the open community meeting had a strong interest in better access to space (studio, performance and work). They felt strongly that both creative and business skills were necessary, but they also acknowledged that many creatives don't know what they have to learn to be more successful. In general, attendees at the open community meeting had an even more bleak outlook on the state of support for Austin's creative sector. The discussants felt that the scores assigned in the overall assessments of Austin as a place for creatives to work were generous.

Overall, among the individuals who participated in this research 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

O1) 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).
- 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).
- d) Overall, small organizations are less satisfied with overall support than larger organizations.

O2) 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
- b) The topics that organizations most want to build expertise in are directly related to the generation of earned and contributed income: fundraising/donor cultivation, marketing/advertising, and communications/public relations.
- c) Finding affordable rehearsal space was considered an issue at the community meeting.

O3) 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.

O4) Significant barriers to pursuing learning opportunities are a lack of internal resources and access to opportunities.

- a) Staff of nonprofit arts organizations don't have the time to take advantage of opportunities.
- b) The costs of organizational 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. Interest was expressed for access to a physical resource center.
- 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."

As with the individual creative, the representatives of nonprofit arts organizations who participated in the open community meeting generally agreed with survey's findings, though there were a few notable exceptions. Like the individual creatives, the nonprofit arts organizations at the meeting felt that the arts and culture sector in Austin is less well supported than indicated by the survey results. Whereas the survey suggests that Austin's creative traditional forms of professional development, with fixed starting and end times, the participants at the open community meeting cautioned against overcorrecting in that direction. This particular group of nonprofit professionals stated that they like a mix of online and more traditional learning formats. Those at the open community meeting agreed with the individual creatives in thinking that the scores assigned in the overall assessments of Austin as a 'great place to live and work' were generous. Regarding the financial support of arts and cultural nonprofits in Austin, some voiced concern that the established, larger organizations receive funding ahead of the smaller and emerging organizations.

In sum, due to tight budgets and limited staff capacities, arts/cultural organizations often feel they are unable 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.

Conclusions

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. They like a mix of independent and face-to-face learning opportunities.
- *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 physical 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.

In reviewing the list of service providers and their range of offerings for individual creatives and arts/culture organizations (see Gap Analysis Report, Appendix A), virtually all of the providers offer training and development programming, 82% offer community networking, 39% have funding availability, 30% offer space/equipment/materials, and only the Austin Creative Alliance offers health insurance. There are clearly a lot of providers offering programs within the same category of services and it will be useful to have further discussion with these providers to explore opportunities to collaborate and leverage resources more effectively.

Recommendations

These recommendations are based on the results of the survey, the work of the Steering Committee, the open community meeting, and the consultants' collective experiences working with different communities. They reflect all that was learned from this process and are intended to inform the City of Austin's Cultural Arts Division on how it can strengthen its support for the creative sector it has been fostering for so many years. The city seems to be at a 'creative crossroads' with several large strategic creative projects underway at both CAD and the Music Division, increasing numbers of creatives moving to Austin, and a city that is growing rapidly. Additionally, CAD and many other service providers are offering a wide variety of support services and resources for the creative sector. This is an opportune time to optimize the effectiveness of those resources and leverage the available assets into an ecosystem that is highly efficient in serving not just the current needs, but the growth potential for a sustainable and vibrant creative economy.

Many of the shortcomings of Austin's support structures for creatives result from a lack of communication within the sector. There are lots of opportunities and resources, but they are not well coordinated with each other. As a result, both individual creatives and arts/cultural organizations find it difficult stay informed about the many programs offered by various service organizations and support networks. By establishing tighter relations and two-way dialogue with the creative community as a whole (in particular with underserved portions of the community), coordinating the available resource providers, and improving communications about the available resources, CAD has an opportunity to increase its impact on the creative field considerably with relatively modest levels of investment. Ideally, CAD would pursue these opportunities in conjunction with the Economic Development Department's Music and Entertainment Division, Small Business Program, and the Museums and Cultural Programs in the Parks and Recreation Department.

A. Establish Ongoing Creative Sector Dialogue

By conducting the *Building Austin's Creative Capacity* creative sector needs assessment, CAD has already taken a significant step towards addressing some of the most pressing concerns in the field. In a general sense, the study has invited the creative community into a conversation about the support they need in order to continue growing Austin's creative vibrancy in the future. But it has also begun to galvanize the sector in more specific ways. This research builds on and expands CAD's previous assessments of the local services available to creatives, including work that fed into the CreateAustin Cultural Master Plan, CAD's earlier needs assessment study, a UT class that assessed creative centers, and CAD's work on a creative expo in 2013.

The comprehensive list of organizations that provide services to various segments of the creative community in Austin that was assembled for the current study marks another step towards greater communication and coordination among the service providers.

Further, CAD reached out to a number of organizations, hubs, and networks in the cultural community to assist with the dissemination of the survey. The value of these lists

of contacts and partners should not be underestimated. All efforts should be made to capitalize on the work that has been done in these areas, by facilitating communications, continuing to build these alliances, and by making these directories available to the sector. The first two recommendations relate directly to these findings.

Recommendation A.1: Convene all of the service providers listed in the survey on a regular basis (quarterly or semi-annually) to review program details, discuss opportunities for partnership, limit duplicative efforts, and to ensure that programs represent the needs of today's creative sector. (See Findings I1a, I1b, O2b, O3a, O4c)

- *Develop a taxonomy of support services* to uniformly classify the existing opportunities into categories such as “business management training,” “creative development,” “early stage career planning,” and “public relations training.” The categories used in the survey may serve as a starting point, but the taxonomy should be developed collectively to build a community of service providers coordinating and working together.
- *Assess the availability of development opportunities in areas identified as top priorities* in the Gap Analysis Report, such as creative skill development, publicity and recognition, and finding financial resources.
- In addition to the taxonomy described above, *a basic system of coding and filtering support programs* based on eligibility criteria, disciplinary focus, experience level (introductory, intermediate, advanced), and form of engagement (online video tutorial, hands-on workshop, panel discussion, etc.) would help users find the right program for their interests, stage of career, knowledge level, and learning style.
- *Establish a unified publicity campaign with common language* to increase the awareness of service opportunities within the creative sector.

Recommendation A.2: Continue to engage networks and build alliances across the creative sector. Given the breadth and diversity of the creative community in Austin, this must be an ongoing effort. The ties within the community that will help CAD achieve its objectives cannot be achieved with a single meeting or a series of events. They must be developed and maintained over time. The survey demonstrated that CAD is highly respected and that its support programs are greatly appreciated by practitioners in the field. However, the challenges faced in soliciting participation from the communities that were targeted for the Needs Assessment survey suggest that there are limitations to CAD's current networks. Both the survey and the community meeting that was held as part of this study suggest that there is demand for more ongoing dialogue between CAD and the creative sector at grassroots levels.

A useful model for this type of dialogue may be found in the meeting that was convened by one of the Steering Committee members during the review of the Gap Analysis Report, which allowed CAD staff to meet with a number of African American creatives to insure that their concerns received adequate attention.³ The success of this meeting also highlights the need to engage with the creative community through multiple communications channels, since no single channel (e.g. online surveys, program evaluations, social media, town hall discussions) will reach all segments of Austin's creative sector.

Such convenings will engage networks and help build alliances across the sector. (See Findings I2b, I3a, O3a)

- Schedule regular creative sector dialogues on specific topics around the metro area to allow for increased communication and sense of inclusion.
- These conversations could be held in a variety of formats and might include a combination of events for which CAD goes out into the community and expanded “office hours” of the sort that CAD offers through the Cultural Funding Programs and the Arts and Public Places Program, at which creatives and arts/cultural administrators can drop-in to discuss their concerns.
- Some of these conversations should be open to the public, but others might target specific groups (such as major philanthropies that support arts and culture in Austin, small arts and cultural nonprofits, art collectors, etc.)
- Provide opportunities for cross-sector dialogue. For example, bringing nonprofit organizations, for profit creative businesses, and individual creatives together will foster understanding, support new partnerships, and build awareness of the breadth and needs of the entire creative sector.
- Explore how CAD's existing social media outlets can be leveraged to increase capacity and relevance. What connections can be made that aren't there now? Consider, for example, dedicated listserves for individual creatives and arts and cultural organizations.
- Such conversations will provide opportunities to collect contact information and build databases of creative community members. It is also anticipated that they will increase the sense of being supported and increase satisfaction level with Austin as a place to live and work. In order to track progress in these areas, it is recommended that the summative assessment questions (about Austin as a great place for creatives and feeling nurtured and supported) are included in future surveys of the creative community.

³ Since completing the initial drafts of this report, additional focus groups have been held with African American, Hispanic/Latino, and Asian American creatives. Findings from these focus groups will be presented in the forthcoming report *Building Austin's Creative Capacity: Community Focus Groups*.

B. Refine Program Delivery Strategy

In commissioning this Gap Analysis, CAD sought to identify how it could better serve the creative sector through its programming. The Support Service Matrix in Appendix A of the Gap Analysis shows that CAD's past programming has been very successful and that it is greatly valued by the creative community. CAD is among the most highly utilized service providers (only the Austin Public Library, which doesn't provide specialized services, was accessed by a greater number of creatives) and survey respondents ranked the significance of its services in advancing their careers and organizations quite highly. There is thus much to be said in favor of continuing CAD's professional development and support programs.

Greater gains seem possible by changing not what is offered, but by increasing awareness and accessibility. The research has shown that many of Austin's creatives generally feel that the development opportunities and support services that they need are out there, but that they don't know where to find them and/or lack the resources (time, money) to take advantage of them. The "gaps" in service provision are thus not actually gaps—the problem is one of access and delivery.

Recommendation B.1: Develop greater online program capacity. While online learning resources certainly won't be the answer to all development needs in the creative sector—and participants in the public meeting were quick to point out that traditional workshops and classes with face-to-face interaction are still highly valued—there is great potential to expand the reach of the services provided while simultaneously reducing the costs of participation (both money and time) by moving some development opportunities online (See Findings O3a, O3b).

Such online resources would not only meet the demand for low-cost information, they would also fulfill the desire for more self-directed learning and informal development opportunities (See Findings I3b, O3b). They could be presented in a variety of formats—articles about best practices, interviews with practitioners, instructional videos, webinars, full online courses, etc.—to suit the content and the needs of various audiences.

These resources would not necessarily have to be developed from scratch or provided exclusively by CAD. It may be possible to collaborate with other service organizations around the country for many content areas (see Recommendation C1 below), and resources that are specific to Austin could be developed in partnership with other local service providers. It would certainly be advisable to develop online content in coordination with Austin's other service providers, if these are convened as recommended above. In fact, some of the other service providers in Austin may have such online content developed that could be reviewed as part of an overall strategy. It would be in the best interest of all, if the online resources were designed to complement the other professional development workshops, seminars, and training programs that are available in town.

Recommendation B.2: In developing online resources, CAD should consider content areas that are highly sought after by individual creatives and arts/cultural organizations. Based on the Gap Analysis, this would include publicity and gaining critical recognition for individuals and fundraising/donor cultivation, marketing/advertising, and communications/public relations for organizations (See Finding O2b). CAD should also consider how, or whether it can collaborate with other service providers to address individual creatives' desire for ongoing artistic and creative development opportunities.

Recommendation B.3: Many participants in this study indicated a desire for mentoring in their professional and creative development (See Findings I2b, I3a, O3a). To meet the need for this type of peer-to-peer professional connection, CAD could consider sponsoring a guided mentoring program. Such a program could be developed in conjunction with other service providers as well as with individual creatives and the leadership of arts and cultural organizations. Mentoring could be one on one or small group coaching or some combination of approach. Providing learning and growing opportunities through connecting a less experienced professional with a more experienced professional could lead to improved skill development and increased professional connections across the creative sector with a resulting deeper commitment to the Austin community. This type of program may well lead to a greater sense of nurturing and support than the creative sector feels currently (See Findings I4b, O1b).

C. Develop Centralized Online Resource

Both among individual creatives and arts/cultural organizations there is a strong desire for a central web-based resource that serves as a repository for all programs that offer support services for the creative sector. This is echoed in the findings about major barriers that prevent people from accessing the services they need: many individuals and arts/cultural organizations don't know what resources are available or where to find out about them (See Findings I1a, O3a).

Recommendation C.1: Build a centralized online resource database for services and programs available across all providers. In effect, create a 'knowledge hub' of services available for the creative economy. In order to maximize impact, adaptability, and responsiveness to changes in the field, this should be separate from any current website, easily branded, and regularly promoted. This resource could include the following:

Local Program Information (See Findings I1a, I3b O3a, O4c):

- Information on all of the training and development programming filtered by service provider, type of program, date, etc. as described above – with all of the offerings by all of the service providers.
- Programs themselves could be further filtered by beginning/intermediate/advanced, early/mid/late career stage, small vs large cultural organizations, 'how to' versus lecture style, low cost or free offerings, etc.
- A directory of support services, per the taxonomy mentioned in Recommendation A.1

A Designed Online Curriculum (See Findings I3b, O3a):

- A variety of on demand resources, such as videos, webinars, and lectures, on topics such as fundraising, marketing, financial planning, career development, etc. These can be collated and cataloged from a variety of sources. Rather than just relying on links, CAD may develop original content or negotiate agreements with other websites and organizations to republish their existing resources.

Resource Links:

- Reviewing searchable online space 'matchmaker' inventory programs to locate a suitable product for the City of Austin.
- Access to information and organizational links for financial resources – loans, grants, venture capital, crowdsourcing, etc.
- Information and links to resources about city permitting and coding as relevant to the creative sector

User-Generated Posts:

- A jobs board, and equivalent space for other forms of calls and announcements (e.g. audition information, calls for submission, space availability)

If users are required to create an account to access certain features of the site, it will be possible to collect contact information and user preferences/interests to target outgoing communications. Periodically reviewing usage metrics along with regular surveys with random users can provide an ongoing source of data regarding the needs and interests of the creative sector.

There are several different ways in which such a centralized source of information could be implemented, ranging from a simple directory of service providers to a complex, interactive website, with all of the features outlined above. (The examples provided below demonstrate some possible formats.) Many of the sub-points of this recommendation could be implemented in isolation and still achieve significant improvements over the status quo; however, CAD is encouraged to consider this as a significant investment in the capacity of the field, which should be capable of future expansion, if it is not implemented all at once.

It is recommended that CAD take the opportunity to start fresh and develop a new website, independent from the City's current site, which could be 'branded' in collaboration with other interested service partners. It may be possible to 'clone' or 'franchise' a website (both the architecture and portions of the content) from another community and adapt it to local needs. Building this resource will take staff time and web development expertise. With the convening of other service providers there is the real possibility that this resource could be co-managed and not necessarily have to be solely maintained by CAD.

Some useful examples of online database resources include:

- The Chicago Artist Resource (www.chicagoartistsresource.org) was launched by Chicago's Department of Cultural Affairs and is currently maintained by the Chicago Artists Coalition. Resources include a series of instructional videos on foundational business tools (the "survival guide"), professional development resources, calls for artists, jobs listings, a spacefinder, a calendar of events, artists stories, articles, and curated links to service providers and networks.
- NYFA Source (Source.NYFA.org) started as a hotline that sought to provide accurate information about resources for artists. It has since developed into a comprehensive website maintained by the New York Foundation for the Arts, listing resources that working artists and emerging arts organizations need to thrive. The website includes classifieds, a database of resources and opportunities, a library of interviews and articles on the "business of art", and professional development programming.
- The Georgia Council for the Arts' [ArtsLinks](#) page is a simple directory of national, state, and local service providers, grouped by category. This is by far the simplest of the web resources presented here. The Council's webpage also features a page of articles and a listing of "Arts Opportunities;" however, these are sparsely populated and don't appear to be updated very often, highlighting the need for ongoing maintenance that is required even for modest websites.

D. Continue to Address Access to Space – performance, housing, studio

This is a perplexing and longterm issue. Concerns about the affordability of living and working in Austin have been prevalent for some time, and is perceived as a major threat to the creative community in Austin. CAD understands the seriousness of this issue. The topic of affordability and cost of living was listed as a key challenge in the 2015 *Austin Music Census* and the findings from the Gap Analysis Report largely echo those of the *Survey of Artists' Space Needs and Preferences* and *Survey of Arts, Creative and Cultural Organizations and Businesses* conducted by Artspace Projects, Inc. and Swan Research and Consulting in 2013.

The 2013 surveys of artists' space needs demonstrated the deep need for affordable and diverse types of space. In particular, the report cited that the creative sector needed:

- Live/work space for individual artists;
- Studio and creative work spaces for artists to rent on either an ongoing or as needed basis;
- Permanent spaces for arts and culture organizations and creative and arts-friendly businesses;
- Event, performance, rehearsal and education spaces for organizations to rent on an occasional basis;
- And, that there was strong interest in renting space on an ongoing basis in a new, multi-use arts facility.

Recommendations for arts organizations and businesses included planning for a mixed-use facility in Austin as well as encouraging property owners and developers to make a variety of spaces available for the creative community. The study also suggests that the City could develop and target incentives for the creation of a new space, which could lead to the formation and retention of arts hubs and districts. Recommendations for individual artists and creatives include creating up to 111 new, affordable live/work space for artists.

Two years later, it remains that there is no easy solution that could alleviate the financial pressures that Austin's creatives experience on account of the ballooning costs of living in the area. To address this issue, CAD has contributed language to the Long-Range CIP Strategic Plan to set up potential public/private partnerships in the development of artist live/work spaces, incubators, and cultural districts for future bond elections. The Imagine Austin Creative Economy Priority Program is currently contributing thinking towards the Land Development Code Revision, reimagining city development tools for creative sector development, and generating a white paper on creative space development. CAD's partnership in the ArtPlace America grant-funded project, thinkEAST, is creating a template for future creative developments across the City.

In addition to these efforts, the following recommendations would be relatively low-cost steps that might keep moving the needle in the right direction.

Recommendation D.1: The City should review the available software options for a searchable online directory of spaces that are available for creative activities. Providing a centralized online inventory of available spaces would add value to a comprehensive online resource. While this recommendation will not do anything to reduce the costs of accessing space in Austin, development and promotion of such a site could help people on the margins of the creative community find out about available spaces and help maximize the utilization of the existing space resources. (See Findings I3e, O4c)

E. Develop an Integrated Vision and Physical Space to Unify Austin's Creative Sector

Austin has a thriving and growing creative sector. In fact, according to a recent report, *Creative New York*, published by the Center for an Urban Future in June 2015, Austin has experienced a 40% increase in its creative jobs since 2003, the highest creative sector growth rate of all US cities. This explosive growth has led to a vibrant, highly engaged creative community that has an enviable reputation around the globe for its creative vibe and signature events such as SXSW.

With this growth have come many challenges. With increasing rents and a highly competitive marketplace, Austin may have reached a tipping point within its creative sector ecosystem. While the density of people and the creative output may contribute to the 'vibe' of Austin, there is a very real possibility that the growth will drive out the creative types who helped put Austin on the map. This means that the ability to develop creative and business management skills and cultivate buyers for creative products and services is becoming ever more important to sustaining this well-reputed creative community. Austin may well be facing the choice in the near to medium term of either seeing its creative sector diminish from lack of support or flourish with increased investment in its continued success.

In addition to proposing the recommendations above, a holistic vision is offered that has the potential to catapult Austin's creative sector to a new and unique position.

Recommendation E1: It is suggested that CAD consider developing a physical gathering space for the creative sector that would function as a real-world compliment to the online information hub described under Recommendation C1. Co-branding the physical and virtual resource centers is suggested to establish a unified presence within the creative sector. The development of this integrated resource center would constitute a strong, visible statement of the City's commitment to its creative community.

Every creative sector planning effort since the 2003 Mayor's Task Force Economy/Creative Economy Subcommittee has recommended an incubator-like space for creatives. However, this proposal goes far beyond a mere incubator space for a limited number of creative businesses or organizations. A physical space that is dedicated solely to supporting the creative community with knowledgeable staff members, classrooms, reference materials, free wifi, computers, printers, copiers, and perhaps performance and/or exhibition space and a café, would go above and beyond the support structures seen in other cities, and make a bold statement of support. Activities

that could be available in the physical space include: regular meeting hours with City of Austin (CAD, Small Business Development, etc.) and other service provider staff, computer access to the centralized online resource, professional development workshops and seminars, meeting rooms, and other services as developed by CAD and the community. This gathering space would make manifest the centralized online resource as well as provide opportunities for networking, mentoring and peer learning. It would be important for this space to be specialized and advanced enough to be useful to professional arts administrators, but also welcoming to emerging creatives and even engaged hobbyists.

This recommendation is similar to a suggestion articulated in *The Austin Music Census: A Data-Driven Assessment of Austin's Commercial Music Economy* (Titan Music Group, LLC, May, 2015). The report suggested a key policy consideration be the *creation of a commercial music industry hub with affordable co-working space*. This focus on one commercial industry along with co-working space is materially different from the recommendation for an integrated creative sector resource. However, if CAD pursues this idea, it would make sense for the city to discuss potential development of both facilities together.

The advantages to the creative sector of such a co-branded virtual and physical space are easily accessible and integrated resources, an opportunity for improved synergy and understanding across the creative sector, and the fostering of collaborations and new partnerships. The advantages to CAD and the other service providers are a centralized location for listing resources and services, the opportunity to connect with creatives first-hand on a regular basis, a place to present workshops, classes, webinars, and a place to connect and coordinate with other service providers.

The creative sector has made it very clear that it believes there is room for improvement in how nurtured and supported it feels by the greater Austin community. Co-branding the virtual and physical space would directly improve that perception and, more importantly, provide Austin's creative sector with access to each other and resources that potentially would be unparalleled around the country. This in turn will continue to build the excellent reputation of the creative sector in greater Austin and increase the sector's economic value.



BUILDING AUSTIN'S CREATIVE CAPACITY

COMMUNITY FOCUS GROUPS

Report to the

City of Austin
Economic Development Department
Cultural Arts Division

By Christine Harris

February 18, 2016

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INTRODUCTION

In order to assess the available support services for creatives in Austin and identify gaps and overlaps in the provision of those services, the Cultural Arts Division of the City of Austin's Economic Development Department commissioned an assessment of the creative sector's needs. The *Building Austin's Creative Capacity: Creative Sector Needs Assessment* used two online surveys to collect data from individual creatives and leaders of nonprofit arts and cultural organizations regarding their support needs and the available services. A full analysis of the survey data, titled *Creative Sector Needs Assessment: Gap Analysis Report*, was delivered to the Cultural Arts Division (CAD) in June 2015.

The survey was actively promoted through CAD's extensive networks in the cultural community in order to garner responses from creatives and organizations working in a range of creative disciplines, organizational structures, and career stages that reflects the cultural diversity of the city's population. In many respects, these outreach efforts were successful: the survey was completed by 528 individual creatives and 67 representatives of cultural institutions. However, there were concerns that Austin's communities of color, in particular the African American, Hispanic/Latino, and Asian American populations, were underrepresented in the survey results. Table 1 shows the demographic breakdown of the survey respondents.

Table 1: Race and Ethnicity of Survey Respondents and the General Population in the Austin Metropolitan Area

	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)

CAD was concerned that people of color working in Austin's creative sector may experience challenges and needs that are not fully captured in the survey findings. It was important to CAD to give these communities the opportunity to surface any additional information about their creative careers. For instance, are there language difficulties, cultural specificities, or content issues that need to be addressed with these populations to ensure appropriate resource access? CAD therefore decided to host three community conversations with minority groups to discuss the survey findings and assess to what extent participants feel that the survey accurately reflects their concerns, or whether they face resource and service needs that differ significantly from those mentioned by the survey respondents.

The participants for these focus groups were recruited through personal invitations from CAD staff members after soliciting recommendations for the list of invitees from leaders from these particular communities. The groups included a mix of individual creatives and representatives of nonprofit cultural organizations, ranging in age from their late-twenties to over sixty and representing an approximately even balance of male and female participants. Eighty percent of the creatives were long-time residents of the Austin area, and about 20% had arrived in the city within the past 3 to 4 years. The nonprofit organizations that were represented at the meetings tended to be rather small in terms of their annual budgets and program offerings. Many of them only have one or two fulltime staff members. While a variety of artistic disciplines were represented at the meetings, a disproportionate number of the individual creatives in attendance work in the visual arts or in theatre.

The participation rates for the focus groups are shown in Table 2. While some participants were both active as individual artists and employed by a nonprofit, Table 2 reflects the status they reported when registering for the focus group.

Table 2: Overview of Focus Groups and Participation

Focus Group	Location	Date	Time	# of Participants		
				Individual Creatives	Nonprofit Staff	Total
Hispanic/Latino	Emma S. Barrientos Mexican American Cultural Center	09/30/15	1:00 - 3:30pm	5	5	10
Asian American	Asian American Resource Center	09/30/15	5:30 - 8:00pm	5	4	9
African American	George Washington Carver Museum and Cultural Center	10/01/15	11am - 1:30pm	4	11	15

All participants were fiercely committed to their creative practice, the health of their cultural community, and the sustainability of their work and audience in the Austin area. At the convenings, they demonstrated a strong desire to network and build community with each other, in addition to getting access to information on cultural resources. They participated in these focus groups out of a shared dedication to improving the cultural opportunities in Austin for creatives and audiences.

This report consists of a brief discussion of the methodology, a summary of key findings culled from all three focus groups, detailed analyses of the discussions in each individual focus group, and a set of final conclusions.

RESEARCH METHODOLOGY

Christine Harris conducted the focus groups on behalf of WolfBrown. The format and approach was designed by Christine and John Carnwath of WolfBrown and supported by the Cultural Arts Division. CAD staff recruited the attendees after developing a list of potential attendees from recommendations that were submitted by leaders in the each of the three communities. The Parks and Recreation Department's Museums and Cultural Programs provided meeting room space in the three city-owned cultural centers. Light refreshments were provided and key staff members from Austin's Economic Development Department, Cultural Arts Division, and the Parks and Recreation Department's Museums and Cultural Programs attended the meetings. WolfBrown arranged for a \$40 stipend for each participant. CAD sent a copy of the survey findings (*Building Austin's Creative Capacity: Gap Analysis Report*) to all participants in advance of the focus groups.

Harris facilitated discussions of a series of questions in a roundtable format with each focus group. These questions were based on reviewing the gap analysis findings to determine to what extent the findings reflect the situations of the focus groups. The core questions used to guide the conversation included, but were not always limited to:

- What has been your experience in accessing support services and resources in the Austin area?
- With respect to the resources and services you know about, how well do they meet your needs? How could they meet your needs better?
- As you reflect on developing your creative practice/organization, what types of learning content would be most valuable to you?
- What are your preferences for types of learning experiences?
- What do you think about the creative 'vibe' in Austin?
- What would give Austin a 5 out of 5 for 'being nurturing and supporting the creative sector'?

Each session was attended by two or three staff members from the aforementioned departments of the City of Austin. The attending staff members included Janet Seibert, Vicky Valdez, Sylnovia Holt-Raab, Meghan Wells, and Laura Esparza. While there were initial concerns that the presence of City staff members might stifle an open and frank conversation, it did not appear that the focus group participants were "holding back" with their comments or critiques in any way. Indeed, the presence of City staff members seems to have been encouraging to participants since it demonstrated the sincerity of the City's desire to hear their thoughts, and it was helpful that the staff members were able answer questions at the end of each focus group session.

SUMMARY OF KEY FINDINGS

In general, the focus groups confirmed the results of the online survey, but they also added some contextual differences worth noting. This section summarizes the responses from all three focus groups in three overarching topic areas: 1. Assessment of existing resources; 2. Service and resource preferences; and 3. Living and working in Austin.

Assessment of Existing Resources

With respect to assessment of existing resources, the groups generally agreed with the larger survey. They appreciate the support services that they are aware of, but believe there needs to be more effort in helping people become aware of all that is available. Among the small arts and cultural organizations represented in the focus groups, the costs of participation and lack of time are considerable barriers. A comment from the Latino group exemplifies remarks made in all of the groups: *"Right now I don't have staff, money or time to move my organization up. Workshops just give us more work – they don't help us get to the next level."*

Likely because the participants in these focus groups primarily represented the perspectives of individual artists and very small nonprofits, there was general agreement that grant writing and fundraising are very challenging. This is partly due to the processes themselves and partly due to funders who are more interested in the number of residents who are being served than more intimate measures of community impact. As one participant put it, *"We often don't serve a large number of people, but we are deep into the community with lots of families on lots of levels."*

Access to space was very important to these groups, and this need was expressed differently in the focus group meetings than in the online survey results. Whereas there was a general desire for greater accesses to affordable creative spaces in the online survey, each of the minority populations participating in the focus groups is served by its own City-supported cultural center. The attendees think of the respective cultural centers as a creative 'home,' and while they value the cultural centers for this as well as for performance and administrative reasons, they believe that more must be done to ensure these spaces are accessible to all users and patrons. As one participant said, *"it needs to be run as an event space, not a city office."*

In the focus groups, increasing access to affordable, appropriate spaces in their respective cultural centers surfaced as the top priority, with access to other affordable spaces across the Austin area as a second space-related concern. Many artists of color produce work for audiences both within their ethnic or cultural communities and for wider audiences across Austin. The limited availability of spaces at cultural centers limits participation from within their cultural communities, and the difficulty of finding alternative spaces throughout Austin makes it challenging to attract the wider Austin audience.

All focus groups expressed a need for greater access to basic operational business support services (e.g. marketing, fundraising, business planning). However, just having access to these services is not enough – they need assistance in understanding how to

implement what they learn in these professional development opportunities within their day-to-day work. Participants in the Asian American group in particular mentioned that the currently available workshops and courses are “*often too general to apply to artists without enough knowledge of how a creative business works. [It] needs a more artistic focus.*” The participants in these focus groups believe that their business mindset is unique, and they would like business resources tailored to the needs, contexts, and backgrounds of artists.

While monetary issues were the predominant concern among representatives of arts/cultural organizations in the online survey, the level of anxiety about this is particularly high among minorities in the cultural sector. The focus group participants believe minorities are under-represented in traditional philanthropy and often these groups have little access to individual donors or private foundations. The online survey suggests that more support goes to established institutions than newer or smaller organizations, which also means that a disproportionate amount of funding flows to euro-centric organizations (which tend to be larger and more established).

As focus group participants reflected on financial support for their programming, they expressed that traditional foundations don't appreciate their impact and therefore aren't attracted to supporting their work. These creative organizations work very intensely with smaller numbers of participants because the impact of their work affects whole families and oftentimes entire neighborhoods. Traditional philanthropy often prefers to support those programs reaching large numbers of people, which is not how many of these cultural programs operate.

Service and Resource Preferences

In reviewing the service and resource preferences, there was much congruence between the focus groups and the online survey. The focus group participants voiced particular support for the survey's findings regarding networking and mentoring. They would like more opportunities to learn from each other and be exposed to people working in various stages of their practice.

As in the larger survey, participants in the focus groups want more self-directed learning opportunities, but they also appreciate a mix of learning formats. The Hispanic/Latino group said there was a need for services delivered in Spanish. One participant noted, “*Many new artists want to get started but Spanish is their first language.*” The Hispanic/Latino group appreciated opportunities to be with a mix of creatives and cultural organizations.

A need was expressed for more mentoring support along the path of their creative businesses. All of these groups appreciated that they had much to learn from people further along in their creative careers – both from within their cultural communities and across all creative disciplines represented in Austin. This was mirrored in their desire for a wider range of business skill development services. There was strong interest in learning business skills earlier in their careers and having support for increasingly sophisticated learning throughout their careers. A quote from the Asian group highlights this: “*We need to learn business skills earlier. I know that I need it and that if I want to be in the field I need to learn the skills.*”

Both the Hispanic/Latino and the African American groups mentioned a desire for a 'hub' or central place for services. This comment expands the survey respondents interest in shared services to the next level of delivery. These participants were looking for shared community as well as shared artistic space. Such a resource center wouldn't be culturally specific or focused on a particular ethnic community as the City's cultural centers currently are, but rather a central information hub that can help all of Austin's creatives advance their professional practices.

A difference between the online survey respondents and the focus groups was the desire for access to more personalized services. Quotes from the African American group (*"can people in the City be assigned 10 organizations each that they meet with once a month and then come together to compare notes on what is needed?"*) and the Asian group (*"There is that middle space where I need more access to networking and money. I need to meet the next people up the ladder"*) reflect this need.

Living and Working in Austin

With respect to living and working in Austin, the focus groups were in agreement with survey respondents that there is an exciting creative "vibe" in Austin and the Latino group gave credit to the "umbrella/fiscal agent grants" for supporting that vibrancy.

The cost of living and working in Austin is the major concern of creatives and nonprofit organizations in greater Austin – no matter their cultural identity. This concern was consistently voiced across all focus groups. As one member of the African American group put it, *"If you can't afford to live here then you can't make art here."* Similar to what was reflected in the Open Community meeting, Austin artists have to make a living by selling their work outside of Austin (often in Houston and Dallas) – currently there is not enough work being purchased from these artists locally.

When asked about rating Austin as a supportive place for creatives and nonprofit arts and culture organizations, all three focus groups would have given a lower rating than the online survey respondents for all of the categories. Comments from the participants focused on needing a larger market for their work, lack of support for their cultural contributions, and difficulty attracting audiences. These comments largely mirror those in the online survey, but there was greater emphasis on their cultural artistic identity in the focus groups.

Each of the focus groups was asked what would need to change in order for them to "strongly agree" that Austin is a great place to live and work. The number one item they mentioned was that their cultural centers would need to be more flexible and adaptable to their needs. Specifically, they would need to be fully available as performance spaces and provide more opportunities for education and sharing services.

These groups also agreed that more promotion of buying local art and investing in local artists would be beneficial to the arts community. Affordable housing and work space were the other key areas in which Austin was thought to fall short of being "a great place to live and work."

The main findings from these cultural community focus group meetings can be summarized as follows:

- The participants would like the City's cultural centers to be more amenable to their needs (e.g., longer opening-hours, more performance and meeting spaces) in addition to having more access to affordable space in Austin.
- Many small (often one-person) organizations have little time or money to access services.
- Individuals and organizations from these communities find financial resources (public and philanthropic) are very difficult to access.
- Given the density of the market in Austin, audience development is very challenging for everyone in the arts/creative sector (regardless of race or ethnicity)
- The focus group participants were even less enthusiastic about Austin as a place for creatives and cultural organizations than the respondents in the online survey.
- More so than was delineated in the general survey, the focus group participants indicated a need to start with very basic business support services early on in their careers and to have continual access to developing their business skills, including professional mentoring.

DETAILED ANALYSIS OF FOCUS GROUPS

This section details the individual focus group discussions under the headings Assessment of Existing Resources, Service and Resource Preferences, and Living and Working in Austin. These categories mirror the categories in the *Conclusions and Recommendations* as well as those in the *Executive Summary*. There is also a section on recommended priorities.

Assessment of Existing Resources

HISPANIC/LATINO

The Hispanic/Latino focus group represented the creative disciplines of visual art, theatre, dance, ceramics, music and arts education. The age range was approximately mid-30's to over 60 with about half representing Hispanic/Latino cultural organizations and the other half individual creatives with a wide variety of creative practices, not limited to specifically Hispanic/Latino culture or audiences.

With regard to access to support services, the Hispanic/Latino group had a good sense of what resources and services are available but had serious concerns about the cost of the services and finding the time to access the services. Many of the organizational participants were operating their business with a very limited staff (often as a staff of one) and believed they had little opportunity to grow their business or even leverage the resources available to move forward. *"Right now I don't have staff, money or time to move my organization up. Workshops just give us more work – they don't help us get to the next level."* Also, reflecting on limited time and money, both individual and organizational participants said *"the cost of my time and limited dollars is too high for the return."*

The administrative costs were also an issue with respect to writing and submitting grants. Concerns were reflected about CAD's cultural grants and others. *"City cultural grants are too rigorous for the amount of money and staff expertise. Texas Commission on the Arts is a much better experience – more friendly, open and non-rigorous."*

This focus group believed that the Latino/Hispanic culture is not recognized or valued by foundations, so it is hard to get enough money to add staff or other resources. In particular, it is very difficult for the smaller organizations to get funding because most Latino groups are much more focused on community impact than the number of people served. As a result, the foundations don't see large numbers served in grant applications. And yet, participants said *"there are 24,000 Latino students in AISD but they are not all getting served by Latino arts."* There is more demand than supply of cultural programming. *"We often don't serve a large number of people but we are deep into the community with lots of families on lots of levels."* In addition, participants believe that the emphasis of the HOT tax on arts-based tourism is perceived to be a challenge for the more community-based arts groups.

The Latino focus group expressed a need for access to more basic infrastructure services – space to reduce overhead, grant money to support administrative assistance, additional staff support to take advantage of the resources that can help them advance. Above all,

the focus group participants were concerned that the Latino population does not have the access to the art and culture that it could, and should, have, and that artists and cultural organizations are limited in their capacity to deliver services to their community.

The participants fully appreciated the role of the Emma S. Barrientos Mexican American Cultural Center and explained that if your organization can present, perform or be resident in the building, it saves costs – *“when I perform at the MACC more money goes directly into my art rather than overhead.”* The City-owned venue has a Latino Arts Residency Program and a developmental program for Latino arts organizations and artists in all disciplines that provide arts and cultural programming to the Austin community. The challenge is that there are two more phases of construction that were planned that are yet to be implemented. These focus group participants would like to see the MACC completed so that a fuller range of cultural services can be offered to the Latino community.

With respect to space availability in the area, there was the comment, *“the City has given space for nothing for groups but not for the Latino community. We need a census of available spaces.”* This is related to the limited financial support available to Hispanic/Latino cultural organizations, mentioned above.

ASIAN AMERICAN

The Asian American focus group represented the creative disciplines of visual art, theatre, dance, photography, comedy/improv, performance art, and music. The age range was approximately early 30's to 50 with about a third representing Asian cultural organizations, a third representing organizations that are not community-specific and the remaining third were individual creatives with a wide variety of cultural practices which were not limited to culturally specific activities. In some cases, the head of the organization (particularly in dance and theater) also performs the art. A couple of the participants were teachers in various university settings.

In assessing their knowledge of support services, the Asian focus group participants registered that they were unaware of all that is available to them. They would like to see better dispersion of information as well as materials better focused on basic needs. *“The material is often too general to apply to artists without enough knowledge of how a creative business works. Needs more artistic focus.”* This group would like to see one location or one person who knows where all of the resources are and could advise on which ones are most appropriate for their business.

This group is interested in a wide variety of basic support services, such as marketing and promotion, legal services, and corporate outreach. With regard to access to these services, they prefer a variety of options and suggest repeating services at different times and locations. A couple of the participants were enrolled in Artist Inc, a new business training program, delivered through a partnership between CAD and Mid-America Arts Alliance, which *“trains you in skills you don't want to do but learn to do.”* This is an intensive 8-week course for 25 artists at a time. CAD had facilitated 2 classes as of December, 2015. Many of the focus group participants also like the City of Austin's Small Business programs and their free and low-cost classes.

There was serious concern about venue space – they need more small/mid-sized spaces as there can be a 15-16 month wait – *“we find the space first and then figure out what to do with it. We love the Asian American Resource Center but it closes at 6. We need it reasonably priced and easy to get in and out.”* The lower cost venues are booked very far out, and technical rehearsal spaces are too expensive for most people.

AFRICAN AMERICAN

The African American focus group was represented by the creative disciplines of visual art, theatre, dance, writing, film, arts education, and music. The age range was approximately late twenties to 60+ with about half representing African American cultural organizations, and half individual creatives with a wide variety of creative practices – some of which focus primarily on serving their cultural community and others that include serving the wider Austin community. In some cases (particularly in dance and theater), the head of the organization also performs the art. All of these participants were deeply rooted in serving the African American community but many also look for performance opportunities across Austin.

These participants registered that they know the information on resources and services is there but there is so little time to get to it. Some commented that not all of the African American businesses have easy access to these resources. The issue of time and staffing was of significant concern - *“When you are doing everything, you don't have time or money to hire someone else to do it. We need creative time.”*

Finding funding is a large issue for this focus group. They believe that many foundations have a grant application process that is too challenging for the potential money, and as the 'HOT tax' has to be dedicated to public performance and exhibition (arts-based tourism) it requires smaller organizations to tap their limited resources for community work to build in such public events. These participants also believe the reporting requirements for grants are too cumbersome - *“If we don't self-report what we have accomplished to the City we don't get access to the resources.”*

These community members are interested in basic business services like accounting, marketing, web design, business planning. They would appreciate templates that could be adapted and used for their purposes.

The George Washington Carver Museum and Cultural Center is perceived as an excellent community resource, although the participants would like more meeting space options. There was discussion regarding a resident theater company at the Carver. Such a step would require further investigation.

Service and Resource Preferences

HISPANIC/LATINO

This group is interested in services provided in Spanish so that new immigrants and up and coming artists have access to opportunities. *"Many new artists want to get started but Spanish is their first language."*

This focus group asks that the City assist them in thinking creatively about supporting themselves better and helping other support organizations understand what the Latino community is doing. They like having the Mexican American Cultural Center but believe that if the City can complete the project they will have more options to support their needs for performance space, artistic displays and classroom space.

With regard to presentation of services, these participants prefer a very practical approach: *"present the material and then discuss it; make it real to our situations."* They like the combination of online access on their time as well as participating in webinars and in-person sessions.

This focus group was interested in sharing resources. They mentioned wanting to learn from having a wide variety of size of organizations in the same program, and they wanted to look at ways in which they could share administrative services. They like the idea of collaborating – *"we could have a hub for the services we have a hard time doing."*

ASIAN AMERICAN

The participants in this focus group are keenly interested in learning more business skills. They want access to expertise and different sets of skills. Along those lines, they are interested in co-op development, where they not only learn from each other but share support services. The support services they are interested in are basic services, such as marketing and promotion, legal services, and corporate outreach.

With respect to service delivery, these participants prefer a mix of times and repeating services at different times and locations.

"We need to learn business skills earlier. I know that I need it and that if I want to be in the field I need to learn the skills". They are also interested in advancing their creative skills but want to make sure they do that at an earlier business stage.

This focus group talked a lot about resources needed at different career stages and expressed a desire for coaching along a career continuum. They would like options for learning as they move through their career. *"After 5/6 years, I need more support systems but what do I need next? I don't know how to find the right people. There is that middle space where I need more access to networking and money. I need to meet the next people up the ladder."*

AFRICAN AMERICAN

The participants in this focus group expressed the need to understand basic business skills. *"We need things better explained to us, like basic bookkeeping."* This group expressed an interest in exploring bartering of services, which they called "experience trading."

Several avenues of engaging with the African American community were discussed. Using retired professionals as business development mentors and better use of the Texas Accountants and Lawyers for the Arts volunteers were two options mentioned. One idea that was explicitly offered was to use the City's social worker model approach of supporting clients in arranged groups – *"can people in the City be assigned 10 organizations each that they meet with once a month and then come together to compare notes on what is needed?"*

This focus group felt it was important to take the services into the neighborhoods; that is, identify meeting places and bring the services to the community. They saw this as an opportunity for all stages of learning – informal settings for smaller organizations along with more formal opportunities at places like the Carver Museum.

Participants in this focus group wanted more direct support from the City. They wanted more access to individuals who can help with resource access, more money, more mentorship, and a commitment to keep the African American cultural life alive and growing. One person said, *"we need an entire department of support in the City – a City supported center of support."*

Living And Working In Austin

HISPANIC/LATINO

Overall, this group believes that there is a positive vibe in Austin - *"one of the reasons there is a good vibe is that umbrella contracts (i.e. fiscal agents) are available."* However, both individual creatives and representatives of arts/cultural nonprofits feel that they are treading water trying to keep their operations afloat and that they are often forced to prioritize the business needs over their artistic work. These participants also registered concern that Austinites don't buy visual art from local artists (they tend to go to Houston and Dallas), which they believe is undermining the ability of artists to support themselves in Austin.

One Latino musician said, *"It really helps my work and reputation to say that I am an artist from Austin but to make a living I have to perform in larger cities. I can't make a living as an artist in Austin."*

Finally, some significant concern was registered about the audience for Latino culture. The Latino population is 33% of the Austin MSA but these participants' assessment is that there is neither proportionate funding nor programming to reflect the breadth of this population. *"We would like more access to resources and would like to feel encouraged instead of graded. We think it is important for the City to think through its cultural policy and what impact it wants to support."*

What would you need to “strongly agree” that Austin is a great place to live and work?

These focus group participants want more affordable living and working space, as well as a space where artists can hang out and connect with each other. They would also like to see more collection of art and greater willingness to pay for art in Austin. They say that too much is available or expected for free in the local art scene. Finally, they would like to see supportive public policy for the Latino community.

ASIAN AMERICAN

The members of this focus group generally want to be considered “artists” rather than “Asian artists.” They believe they are somewhat “forced” into an “ethnic identity,” while they are interested in more mainstream acceptance and visibility. These participants are committed to their own resourcefulness – *“we can’t just follow a road map to success, we need to be self-motivated.”*

Concern about patron support was raised. *“There are not that many patrons in Austin that buy local. The patrons that are here want bigger artists from elsewhere.”* And another comment was, *“I sell my art elsewhere. Can we collect all local artists on one website – use it to educate the patrons and cultivate more patrons?”*

What would you need to “strongly agree” that Austin is a great place to live and work?

This group would like to see local artists included in mainstream programming, e.g. in museums, galleries, etc. Along with this, they would like a better market to sell their work in Austin. There was some concern about identity – *“our own community is culturally stuck – our community will support international cultural outreach (e.g. national touring programs) but what we need is more support and commitment to being visible in the local mainstream.”* Funding options need to be communicated more clearly to raise confidence and morale in the community.

These participants would like to see artistic work better highlighted by the City. For instance, they suggested that the City could develop and promote an award program similar to the B. Iden Payne awards for theater, the Austin Music Awards, and the Critics Table Awards to cultivate recognition, pride, and honor. They see value in developing a residency for an artist from outside Austin to increase quality and local credibility, and they would like to see local Austin artists have residencies in other communities. They are interested in fostering artistic growth opportunities.

Finally, this group wanted a better quality of life – more affordable housing and health insurance along the lines of the musicians’ Health Alliance for Austin Musicians program.

AFRICAN AMERICAN

This focus group believes that Austin is a very challenging place to live and work for African Americans. With a declining population, attention to their community needs has been reduced. They believe this negatively impacts the support for and growth of the African American cultural identity and expression. In general, the participants from this community feel very marginalized.

What would you need to “strongly agree” that Austin is a great place to live and work?

These focus group participants would like to see a larger cultural facility with more spaces available for meetings, classrooms, and performances. They want this venue to be run like an event space and not like a city office. They like the Carver Museum but believe it is too small and that the opening hours are limiting. Providing a hub to relate to the African American story would be highly desirable. Houston's S.H.A.P.E. Center was cited as an example (<http://www.shape.org>).

In addition to accessing performance space, there was interest in more private/public development for artist housing – cooperative housing like the Project Row Houses in Houston's Third Ward – and perhaps including transient residencies for young people who are coming into town. Interest in “incubators” and collaborative spaces was also expressed as important for better working conditions in Austin.

The issue of affordability of working and living in Austin affects how people feel about being in Austin. *“If you can't afford to live here then you can't make art here.”*

This focus group was interested in cultivating the African American audience and requested help in making the arts more accessible to the African American community. Independently of the focus group, a group of African American creative met to discuss their common concerns and support needs with CAD staff in a less formal setting, indicating their commitment improving their situation and their openness to dialog about potential improvements.

Prioritizing Activities

Each of the focus groups was asked what they would prioritize for developing the cultural community of Austin. They generally agreed on the following:

- ✓ Keep these conversations going – this is helpful dialogue.
- ✓ Work more closely with artists to develop ideas and policies; *work with us not just for us.*
- ✓ Do something about affordable housing and work space.
- ✓ Provide more accessible funding options, including easier application processes.
- ✓ Ensure that there is continual celebration and support of all diversity in Austin.

CONCLUSION

Overall, there was significant congruency between what was learned from the focus groups and the results of the online survey. The key differences were that the focus group participants wanted:

- more intensive and extensive use of their respective cultural centers;
- more opportunities to interact with and learn from other creatives both within their cultural communities and in the wider creative community of Austin;
- better understanding of how they serve their communities from the philanthropic sector; and
- more basic infrastructure support (money, staff assistance, services support, fundamental business education).

It was also clear that more frequent dialogue with communities of color will not only be welcomed by these the individual creatives and leaders of cultural organizations in these communities, but will also lead to a much fuller understanding of what is and is not working for individual creatives and nonprofit organizations in Austin. These conversations were an excellent beginning of a more engaged dialogue between the City of Austin and the cultural community.