

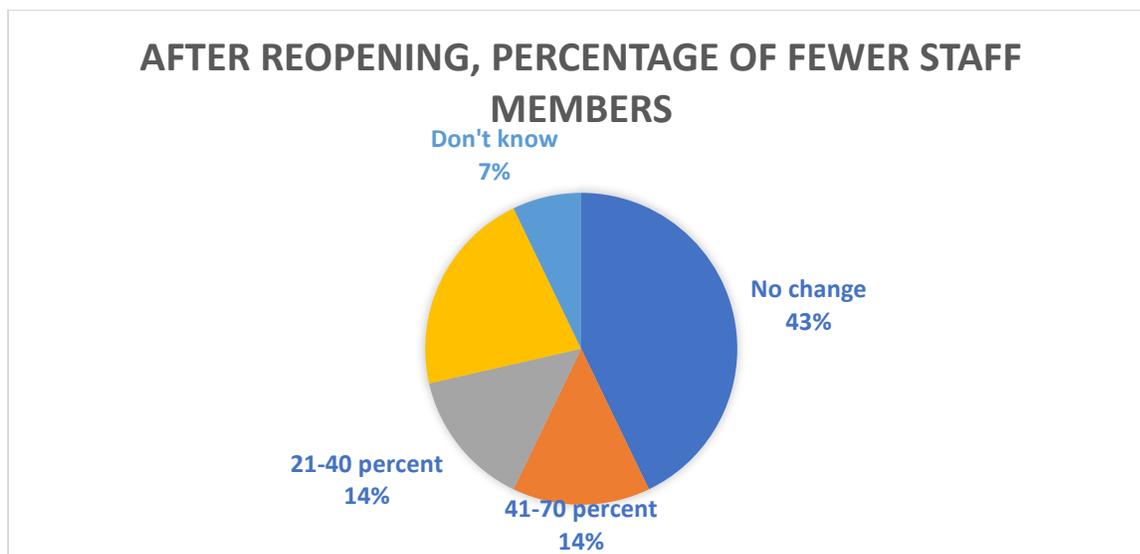
State of the Arts Survey Results

All of the Arlington supported arts groups were sent a “State of the Arts” survey by Embracing Arlington Arts and we received 100% participation. The goal was to ascertain how the pandemic and resulting shutdown has impacted these organizations, their staffs, their budgets, and contractors relying on them for their own livelihoods. The results prove that this critical industry is badly hurting and the situation will likely get worse over the next six months or so. In a separate document we are asking the County Board and other decisionmakers to consider several suggestions we are offering in how they can partner with these organizations to ensure a stronger arts and culture presence in 2021 and beyond.

Staff:

Arts organizations have unfortunately had to lay off or furlough numerous part-time and full-time staff since the shutdown began in mid-March. According to the survey results, arts organization had to lay off or furlough 15% of their full-time staff and 55% of their part-time staffs as of November 1. (NOTE: These numbers will likely increase as many arts organizations, including theaters and musical organizations will be unable to offer live performances which generates much of their revenue for at least another 3-4 months.) Additionally, these numbers do not encompass the many hundreds of contractors who lost income due to projects being cancelled. While some of these contractors are being hired again for streaming content, they are more than likely being paid a fraction of what they would have normally earned for in-person work.

Of the survey respondents who employed staff, half anticipate having smaller staffs than before the pandemic hit when they begin presenting live performances again and only 43% anticipate returning with the same staff levels.

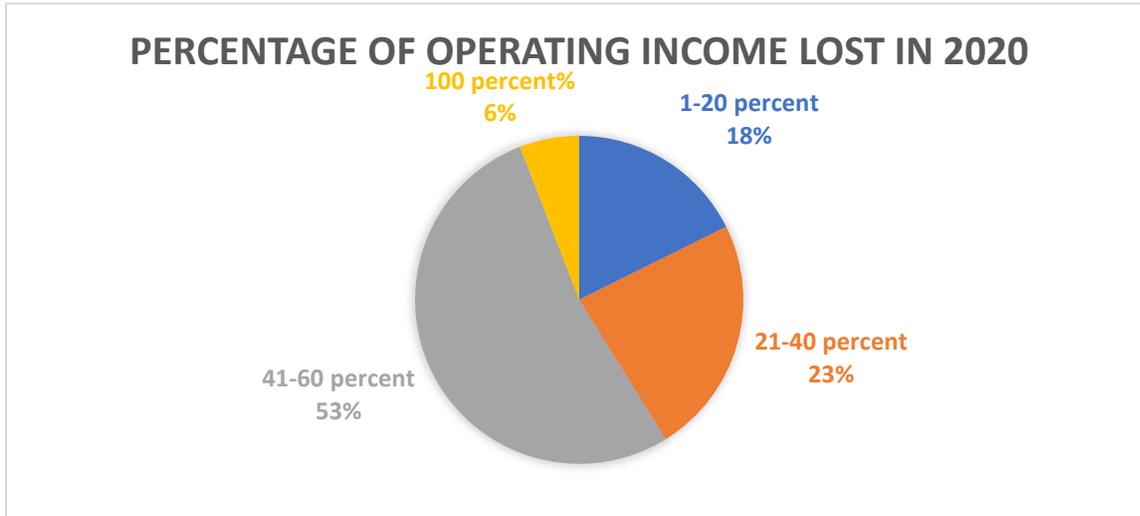


Operating Reserves:

According to the survey results, the median average of months of reserves on hand for arts organizations is 4 months.

Income Lost in 2020:

All of the organizations surveyed experienced a loss in income due to COVID-19 and over half have lost 41-60% of their total expected income this year. Total estimated lost income was over \$10 million in 2020 alone and this does not include expected lost income in 2021. The percentage of losses for these organizations as a component of their total budget is detailed below.



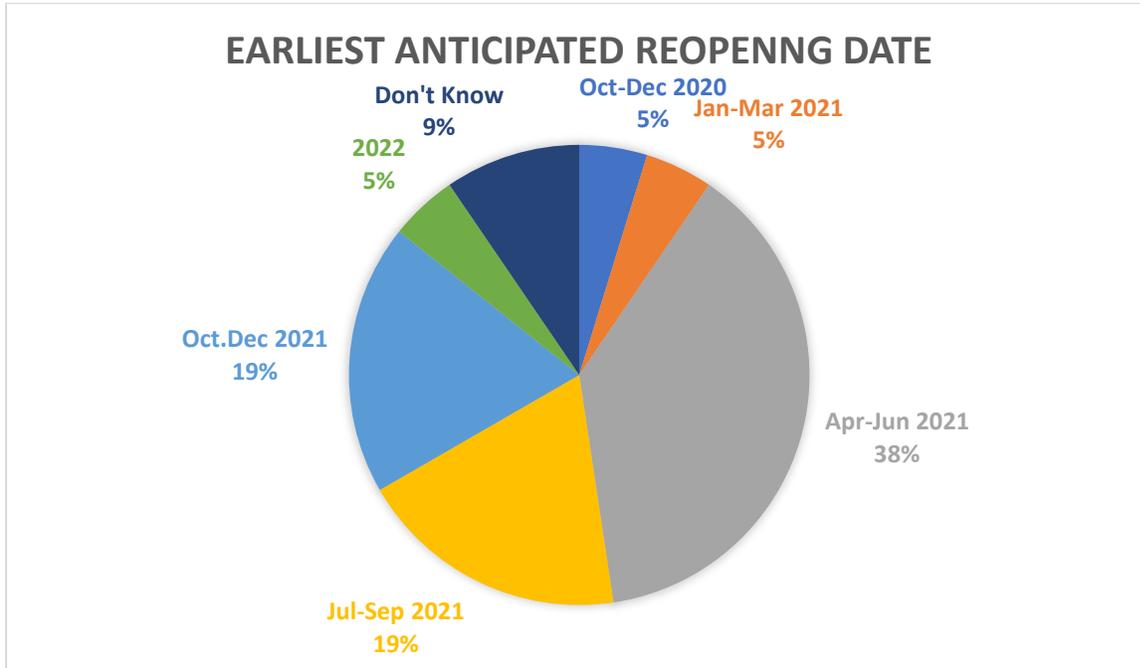
Closing if no help available:

The groups were also asked if there was a significant risk of their organization closing in the next 16 months absent additional financial resources. (NOTE: One Arlington dance organization has already shut its doors due to the shutdown.) Forty-three percent of respondents either believed their organization would have to shut down or did not know.



Reopening:

Finally, the organizations were asked what was the earliest they foresee their organizations being able to offer live, in-person performances again. Only 10% believed it would be possible within the next 4 months, with the vast majority responding not until after April 2021 – five months from now.



Yet They Continue Giving Back to the Community:

Despite the toll the pandemic and shutdown is taking on artists and the arts industry, these individuals and organizations have continued generously giving back to the community in so many ways. Here is a sampling of their efforts:

Our dance companies made available to seniors and those with physical disabilities a series of short videos of dance pieces to help them exercise and combat emotional and social isolation.

A chorale group offered ZOOM meetings to keep seniors stimulated and engaged during this long shutdown.

Several theater companies conducted free play readings and other online performances and events to continue bringing the arts into residents' daily lives to stave off boredom and loneliness.

Several visual arts organizations offered virtual tours of exhibits and artist talks for free.

A theater company partnered with other theater and non-profit organizations to provide supplies for those participating in the Black Lives Matter protests.

A cultural heritage group set up a COVID-19 Medical Advice Hotline to help their community receive valuable medical advice from medical professionals.

Two theater companies partnered with AFAC to help boost donations through a video and helped collect goods for families in need.

A visual arts organization delivered art kits to children at Bridges for Independence's family shelter and present monthly online workshops for these children.

A theater company continued its work with students in need of social outlets through weekly play readings and creating an original film.

Several organizations, recognizing the need for parents to continue working, pivoted their summer camps to an online format at greatly reduced rates and a high learning curve for their limited staffs and instructors.

A musical organization performed an outdoor concert for the residents of Goodwin House.