

A R T S V I S I O N

State of the Arts in
Howard County 2003

A Planning Guide

Prepared by Jean Moon & Associates
For the Howard County Arts Council
in partnership with Vision Howard County

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Background and Purpose

In 1991, the citizens of Howard County developed a 10-year plan for the arts community. The plan, *ArtsVision 2001*, identified areas of need, and developed goals and timelines for implementation of strategies to achieve those goals. In the years since *ArtsVision 2001* was published, Howard County has grown and changed dramatically. Artists and arts organizations face new challenges today, as do those that support their services – corporations, foundations, individuals, and government agencies.

In light of these changes, the Howard County Arts Council (HCAC) embarked upon an assessment and update of *ArtsVision 2001*. The process began in October of 2002 after funding was secured from the National Endowment for the Arts, the Howard County Arts Council, Columbia Association, and the Maryland State Arts Council.

In order to evaluate progress and set new priorities, the following questions needed to be answered:

- How has Howard County changed since 1991?
- How has the arts community changed since 1991?
- What are the current trends in the arts community, and the community at large?
- Are the original goals stated in *ArtsVision 2001* still valid?
- Are there new needs?
- How can the arts community meet these needs?
- What are the indicators that can be used to track change in the future?

The Howard County Arts Council selected Jean Moon & Associates to conduct an assessment and publish a new report that included all these factors.

ArtsVision 2001: Then and Now

ArtsVision 2001, published in April of 1992, was a 10-year plan for the arts and culture in Howard County. The plan, with goals, strategies, organizational responsibilities and timeline for implementation was meant to be an action-plan for the arts and cultural institutions in the county, including the Howard County Arts Council. Goals and strategies were built around 12 issue areas: advocacy, art-in-public-places, arts organizations, artists, audiences, education, funding, Howard County Arts Council, multiculturalism, participation, regional partnerships and space. *ArtsVision 2001* Goals and Strategies are included in the Appendices.

During the course of the assessment and update of *ArtsVision 2001*, it became clear that some issues no longer held the same level of importance, and the goals were restructured accordingly. As much as possible, the issue areas and goals of *ArtsVision: State of the Arts in Howard County 2003* parallel the original document: advocacy, art-in-public-places, arts organizations, artists, diversity, education, funding, Howard County Arts Council, marketing and audience development, and space.

ArtsVision: State of the Arts in Howard County 2003

The new document, *ArtsVision: State of the Arts in Howard County 2003*, builds upon *ArtsVision 2001*, and includes data about the community of Howard County as well as the arts community.

ArtsVision: State of the Arts provides the citizens of Howard County with a realistic assessment of the arts in the county today. It is designed to serve as an advocacy tool, resource, and planning guide for artists, arts organizations, educators, funders, and policy-makers as they look towards the future of the arts in Howard County. The document will help artists and arts organizations identify trends, assess their programs, and build organizational capacity. *ArtsVision: State of the Arts* is not an action plan for any agency, public or private, arts or non-arts, including the Howard County Arts Council.

Using the Planning Guide

As a planning guide, the new *ArtsVision: State of the Arts* document:

- Provides a “snapshot” of Howard County, including current demographic, economic, and social data.
- Evaluates the “state of the arts” nationally, in Maryland, and in Howard County, utilizing data from many sources.
- Recommends ways to achieve the goals identified during the six-month process, and offers innovative ideas that arose in interviews and surveys.
- Identifies indicators that individuals and groups can use to monitor change in the arts community and to track the success of organizations’ efforts.
- Provides resource information for artists and arts organizations as they build their plans for the future.

For purposes of this study, the consultants have used information about the arts in Howard County gathered from the Howard County Arts Council’s grant recipients from the past 10 years. Operating grant recipients are organizations with 501(c)(3) nonprofit status whose main purpose or mission is to produce or present the arts through public programs or services. In addition, HCAC makes some arts projects grants to qualified 501(c)(3) nonprofit organizations for the presentation of arts-related activities.

This study does not include audience or other statistical information from the commercial arts industry in Howard County, such as Merriweather Post Pavilion, or senior and community centers or libraries. While these organizations do present arts activities, their missions and core services are not solely focused on nonprofit presentation of arts programs.

However, representatives from the commercial arts industry and other presenters were included in focus groups and interviews so as to inform the study with their insights and perceptions.

The statistical information gathered for this report is consistent with the information used in the original *ArtsVision* document. It is also consistent with the information used by arts funders and public policy organizations across the U.S., such as the National Endowment for the Arts, the Ford Foundation, Americans for the Arts, and the Maryland State Arts Council; when compiling regional and national data, these organizations utilize information from the nonprofit, rather than commercial, arts industry.

Process

To ensure broad community input, the assessment process was overseen by a 27-member Steering Committee made up of arts, business, community, education, and government leaders.

As the lead partner, the Howard County Arts Council oversaw the work of the project consultant, raised funds to support the project, and provided administrative support and meeting space. The project consultants, Jean Moon & Associates, conducted research and managed the project. Vision Howard County assisted with research and oversight.

Jean Moon & Associates conducted 30 45-minute interviews with various community and arts leaders, asking questions about changes in the community, challenges to the arts, and assessing the results of the *ArtsVision 2001* plan. Concurrently, eight focus groups met to discuss changes in the community and current needs. These included: Ethnic Populations, African-Americans, Older Adults, Educators, Music, Theater and Literary Arts, Dance, and Visual Arts. Focus group participants met again as a group to review the goals and recommendations developed over the course of several months.

A survey assessing the results of *ArtsVision 2001* was distributed to 156 arts leaders and organizations in the county, with a return rate of 42%. A different survey, assessing income, education levels, and attendance factors, was distributed at arts venues and events around the county; this survey was also distributed to the general public. Surveys were returned by 898 Howard County residents.

Jean Moon & Associates also conducted research and evaluated data from many sources in order to provide current information about Howard County and the “state of the arts.” Many of the resources utilized are listed under the section “Resources for the Arts.”

As a result, more than 1,000 people participated in the *ArtsVision* process.

About the Project Partners

The Howard County Arts Council

The Howard County Arts Council was established as a private, nonprofit organization in 1981 to serve the citizens of Howard County by fostering the arts, artists, and arts organizations. To fulfill its mission, the Howard County Arts Council sponsors a wide range of programs that not only foster the arts, but encourage community-wide participation and support for the arts. The Arts Council is governed by a volunteer Board of Directors.

In 1984, the County Council designated the Howard County Arts Council as the local agency responsible for re-granting Howard County and State of Maryland funds for the arts. The grant program that was subsequently established has been cited for its excellence by the Maryland State Arts Council and used as a model for other county arts councils around the

state. Grants that are awarded can be used to underwrite operating costs associated with running an arts organization or to support projects in the arts. In its first full year as a re-grant agency, the Arts Council awarded \$37,000 to 10 arts groups and six public schools. Today, the Arts Council manages four grant programs – Artist-in-Education, Baltimore Arts and Cultural Organizations, Community Arts Development, and the Jim Rouse Theatre Subsidy – as well as a scholarship program. In FY2002, the Arts Council awarded \$336,800 to 27 Howard County organizations, 14 public schools and the Ellicott City Head Start, and seven key Baltimore City organizations that provide significant services to Howard County residents. Funding to support the grant program is received from Howard County, the Maryland State Arts Council, corporations, foundations, and individuals.

The Arts Council also oversees the management of the Howard County Center for the Arts, a 27,000-square foot facility in Ellicott City. The Center, which opened in 1983, is a community resource where citizens of all ages and abilities can participate in the arts. The Center features two galleries, classrooms, meeting space, a 100-seat black box performing space, studios for visual artists, and office space for arts groups. The Center is home to 14 visual artists, the National Quilting Association, Piano Perspectives School of Music, Eva Anderson Dancers, and 10 affiliate arts groups.

During its formative years, 1981 to 1991, the Arts Council established several of its signature programs such as: the Community Arts Development and Artist in Education grants; the Art Maryland, Art HoCo, HoCo Open, Youth Art Month, and Howard County Center for the Arts Resident Visual Artists exhibits; the Performing Arts Showcase; the Howie Awards for outstanding artist, arts educator, and business supporter of the arts; Art Center usage and tenant agreements; and membership, among others.

In 1987, Howard County Government hired consultant Joseph Wesley Ziegler to conduct a cultural needs assessment. The assessment involved over 4,000 participants and was completed in 1989. As a follow-up to the assessment, the Arts Council worked with Zeigler to develop *ArtsVision 2001*, a 10-year plan for the arts. The plan has been used to guide the arts in Howard County and has resulted in new facilities, increased opportunities and access to the arts, growth in both organizations and programs, and the development of stronger regional partnerships.

One of the goals of *ArtsVision 2001* was to create new facilities and, as a direct result of the plan, the Howard County Center for the Arts was renovated and transformed into an exciting multi-purpose arts incubator space where both artists and the public can explore the arts. Renovations at the Center were completed in 1996, and the black box theatre was opened for public use in 1998. In addition, the Arts Council, along with Howard County Government, Howard County Public School System, and numerous individuals and corporations, formed a public/private partnership to create The Jim Rouse Theatre for the Performing Arts (JRT), a \$1.2 million state-of-the-art theatre in Columbia, Maryland. The JRT complex was built as a two-story wing of the Wilde Lake High School and features a 739-seat main theatre, dance studio, choral arts room, band room, and black box instructional theatre.

Another goal was to increase regional partnerships and opportunities. To that end, Howard County Government invited the Howard County Arts Council to formalize a process for, and administer, the Baltimore City Arts and Cultural Organizations grant program. The program, established in 1992, awards operating grants to nine key Baltimore institutions. Final reports from grant recipients show that Howard County residents make over 250,000 visits to these organizations each year and that county residents also support these organizations through memberships and other contributions.

Another goal was to extend educational opportunities and, in 1994, the Arts Council received a major grant from the National Endowment for the Arts for a multi-year program of extended residencies to place artists of ethnically and culturally diverse backgrounds in the schools and community sites. The program culminated with a commission for a public sculpture at Thunder Hill Elementary School. In addition, the Arts Council established an arts scholarship in 2001.

Arts advocacy and participation were also cited as goals in *ArtsVision 2001*. Between 1998 and 2001, several new initiatives were developed to inform existing audiences and reach out to new ones including quarterly arts roundtables, the county-wide on-line events calendar, the *Directory of Arts Programs and Resources*, a new Arts Council web-site and brochure, the Fabulous 50+ Players, the Head Start in Art pre-school program, and the No Boundaries Musical Theatre Program for young adults with disabilities. In addition, the Arts Council received a major grant from The Horizon Foundation to conduct a nation-wide study on arts programs that address community health and wellness issues that resulted in the 135-page report, *A Study of Model Community Arts Programs*. The report, published in 2002, includes in-depth descriptions and case studies of programs, additional data and findings from other sources (surveys, interviews, research, comparable U.S. counties), and recommendations on the development of future arts-based health and wellness programming in Howard County.

Funding was also cited as a goal in the original plan. In 1997, the Arts Council initiated the Celebration of the Arts in Howard County, a gala fundraising event held at The Jim Rouse Theatre in Columbia. With the Celebration, the Arts Council was able to increase partnership opportunities for businesses and create greater visibility for local artists and arts groups. One of the main purposes for establishing the event was to find additional funding sources to support the Arts Council's local grant and educational programs and, in five years, it has raised \$324,000 (net) for the arts in Howard County. To ensure the longevity of support for the Arts Council, The Future of the Arts in Howard County Endowment Fund, administered by The Columbia Foundation, was established in 1999.

In 2002, the Arts Council was awarded grants from the National Endowment for the Arts, the Columbia Association, and the Maryland State Arts Council to partner with Vision Howard County to assess and update *ArtsVision 2001*. The Arts Council Board and staff will use the updated plan to inform their strategic planning process.

Vision Howard County

Vision Howard County (Vision) is an all-volunteer nonprofit civic organization dedicated to improving the quality of life in Howard County. Incorporated in June of 2000, Vision's committees monitor and track issues of importance to county residents and partner with other organizations to address these issues. Vision has delivered testimony to the Howard County Council on issues ranging from historic preservation to affordable housing.

Vision most recently produced a *Report on Quality of Life Indicators* for Howard County, which includes indicators of the economy, environment, education, public safety, health, and community life. This information will help county residents to address the needs of those less fortunate, protect our resources, encourage community involvement, and hold ourselves accountable for change. The report on indicators is designed to provide a guide for action for county policymakers, businesses, and individuals.

Vision Howard County grew out of Howard County – A United Vision, a grassroots visioning and long-range planning project chaired by Sandra Trice Gray, then of Independent Sector, and former County Executive Chuck Ecker. With facilitation from the National Civic League and a coordinating committee, 200 “stakeholders” and numerous other county residents worked for 9 months to develop a vision and goals for the future of Howard County. The work of Howard County – A United Vision set the stage for the Howard County to win the National Civic League's All America County designation in 2001.

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Demographic, Economic and Social Trends in the Past Decade

Howard County has changed dramatically in the past decade, and as the arts community prepares for the future, it is essential that it be fully informed of the state of the county today. This “snapshot” briefly reviews the demographic changes, median income, education levels, job growth, mobility, charitable giving, and lifelong learning opportunities in the county – all of which impact the arts, artists, and arts organizations.

Population and Demographics

Howard County is home to approximately 250,000 residents. Its population has grown 32% in the last decade, and it is the third-fastest growing county in the state, behind Calvert at 45% and Worcester at 33%. One quarter of its population is non-White, and 56 different languages are spoken in its schools. Between 1990 and 2000, the Latino population grew 103% to 7,500,¹ and the Asian population by 137% to more than 19,000. The number of foreign-born persons more than doubled, from 11,367 people in 1990 to 28,113 in 2000, representing 11.3% of the population.

The latest data show that those 60 and older represent 10% of the county’s population, made up of 57% women and 43% men, with 16% a racial or ethnic minority. Nearly half have a college or advanced degree, and 30% remain in the workforce. Compared to seniors in other jurisdictions statewide and nationally, most seniors in Howard County currently experience a quality of life that is as good or better. They are well-off financially – 34% have household incomes of \$60,000 or more. The senior population in Howard County is expected to grow 169% over the next 20 years.²

According to the Howard County Disability Services office, estimates are that 20% of the population in any jurisdiction has some type of disability – sensory, physical, mental, or self-care – while half of those (or 10% of the population as a whole) have more severe disabilities.

Household Income

According to the U.S. Census 2000, Howard County is the 10th richest county in the United States, with a median household income of \$74,167. With this tax base, there are many amenities available to citizens, including exceptional public schools, public recreation facilities, some local transportation, and cultural opportunities.

While Howard County’s overall median income is high, it is not uniformly high for every census tract: in 1989, median income varied from under \$42,000 along the Route 1 corridor to \$70,000 to \$78,000 in the Clarksville area. Census 2000 figures show median income varying from under \$60,000 along the Route 1 corridor, to \$110,000 to \$117,000 in the Clarksville area. Those who reported lower median income showed less gain in 10 years than those at the high end of the scale. Several older Columbia neighborhoods reported little gain in household income in the past decade. Those households with lower median

¹ County government estimates that the Latino population numbers approximately 15,000; Census estimates are considered to be low, given the difficulty accounting for the immigrant population.

² Data from Howard County Office on Aging, *Summary of Status of Seniors in Howard County, 2001*.

income remain concentrated along the Route 1 corridor, and in the Ellicott City neighborhoods bounded by Rtes. 29, 40, Interstate 70 and the county line. Howard County's General Plan 2000 acknowledges that high property values and the high proportion of recently built expensive, single-family homes have caused housing prices to rise substantially and have put most market-rate houses "out of reach of low (50% or less of the median) or moderate (up to 80% of the median) income households."³

Estimates from the U.S. Census 2000 show that approximately 3.9% of the population lives in poverty. In 2000, 4,242 children (9.5%) in the Howard County Public School System received free or reduced lunches. An estimated 12,000–15,000 people are without health insurance, and the homeless population continues to rise, according to the agencies and organizations that provide shelter and services to the homeless.

Quality and Levels of Education

For eight of the last 10 years, the Howard County Public School System has ranked first among Maryland's 24 school districts on the state's School Performance Assessment Report Card and, in 2000, the county had the state's highest composite scores for both fifth and eighth grade. The school system has been able to improve performance results despite a 42.6% increase in the number of students since the 1991-92 school year, and is nationally known for its quality of public education.

As of the 2000 Census, Howard County ranks eighth among counties nationwide for its percentage of residents with a higher education. It ranks first among Maryland counties, at 93.1%, in the percentage of residents over 25 with a high school degree, and sixth in the region, at 52.9%, in the percentage of residents over 25 with a college degree. However, the number of residents over 18 without a high school diploma is 9%,⁴ or 12,900 residents, and an estimated 11% of the population reads at Level 1, that is, able to read a little, but not well enough to fill out an application, read a food label or read a simple story to a child.⁵

Job Growth and Employment

What was once the largely agrarian society of Howard County has been transformed in 30 years to an economically and culturally diverse suburban county. Nevertheless, 25% of the county's land remains agricultural, and agriculture is a \$345 million industry in the county. In fact, a recent equine survey revealed that Howard County has the most horses, at over 5,000, of any jurisdiction in the state.

According to 2000 Census data, Howard County has created 52,073 jobs since 1990, a growth rate of 64.4% – the highest in Maryland – while the population has grown 32.3%. This growth has been fueled largely by the high tech industries, but the county retains a diverse economic base that is fundamental to a healthy economy. As a result, Howard County has a very low unemployment rate, below that of both the state and the nation.

³ Howard County Government. *Howard County General Plan 2000*: 78

⁴ Data from Maryland State Department of Education: www.msde.state.md.us.

⁵ As defined by the National Institute for Literacy: www.nifl.gov, and modeled by CASAS, www.casas.org.

(In December 2002, Howard County's rate was 2.4%, while the state of Maryland's rate was 4.2%.) There is a chronic shortage of entry level and unskilled workers, primarily because of the cost of housing and the lack of public transportation, and there is some concern that this could adversely affect future job growth. The General Plan 2000 for Howard County estimates that job growth will continue at an annual average rate of 4,000 jobs until 2010 when it will then slow to an average of 3,000 jobs. This slowdown is expected because of a declining land supply, increase in traffic congestion, and rising numbers of retirees as the baby boomers reach retirement age.

Mobility

Sixty-two% of the Howard County workforce commutes daily, compared to an overall 47% of state residents who work outside their resident counties. Approximately 30% commute to the Baltimore area and 31% to the Washington, D.C. area, while the balance, 1%, commute out of Maryland. People who live outside of the county hold more than half of the county's 134,000 jobs and must rely heavily on the automobile to bring them to their places of employment. Employers have difficulty finding low-wage workers, most of whom cannot afford housing in the county and whom often rely upon public transportation. Some companies, at their own expense, have begun transporting such employees to their jobs, as little transit is available coming into the county. The Corridor Transportation Corporation, which manages transit in Howard County, reports that transit ridership has grown 122% since 1998, as the county has increased its investment in public transit. Even so, the vast majority of travel in Howard County is by automobile.

Charitable Giving

In 2000, the Howard County United Way campaign raised more than twice as much as other jurisdictions with much larger populations, \$2,917,002, and had the largest per capita contribution to the United Way of any county in the region. More specific county information regarding general charitable giving is not available.

Howard County is the 10th wealthiest county in one of the wealthiest states in the country, although Maryland has historically been seen as a less generous state than most, according to a report by the Association of Baltimore Area Grantmakers. *The State of Giving in Maryland 2002*, which focuses on giving trends and challenges in the state, with emphasis on Central Maryland, of which Howard County is included, partially refutes this perception.

Factoring in the high cost of living in Central Maryland, it appears that Marylanders are not as ungenerous as previously recorded – if they earn under \$100,000 a year. In 2000, Marylanders earning \$75,000 to \$100,000 ranked third in the nation, while those earning \$100,000 to \$200,000 ranked 7th.⁶ Those earning \$200,000 to \$500,000 ranked 35th, and those earning more than \$1 million ranked 38th.⁷

Organizations providing funding to nonprofits in Howard County include The Columbia Foundation, The Horizon Foundation, and The Rouse Company Foundation, among others. Funding specifically for the arts is provided by the Howard County Arts Council, and the

⁶ With cost of living factored in, according to the Association of Baltimore Area Grantmakers and the Baltimore Giving Project: *State of Giving in Maryland, 2002*

⁷ Association of Baltimore Area Grantmakers and the Baltimore Giving Project: *State of Giving in Maryland, 2002*

Maryland State Arts Council. Howard County arts organizations may also be eligible to receive funding from the National Endowment for the Arts, the Mid-Atlantic Arts Foundation, and other local and national funders of the arts.

Life-long Learning

Opportunities for adult education abound in Howard County. Credit and non-credit courses are offered at Howard Community College, Loyola College in Columbia, University of Phoenix (Howard County campus), Johns Hopkins University, School of Professional Studies, Columbia Center, and the Education Center at the Johns Hopkins Applied Physics Laboratory. In addition, classes for all ages are offered by the Howard County Arts Council, Howard County Department of Recreation and Parks, the Columbia Art Center, Slayton House and at a number of other community centers.

In conclusion...

Howard County has a growing, wealthy and highly educated population. The County's location and excellent school system have spurred growth and development, and in the last decade it has boasted the highest rate of job growth in the state of Maryland and a low unemployment rate. Many amenities are available to the residents of Howard County, and numerous opportunities exist for adult education.

The data in this section have ramifications for the arts and arts programming in the future. The latest National Endowment for the Arts' *Survey of Public Participation in the Arts*,⁸ states that, in order of impact, the four most important predictors for arts participation are: education, income, gender, and age. Howard County's well-educated, generally wealthy, and aging population is well-positioned to support arts activities and recognizes their importance to the community's quality of life. A stable economy like Howard County's provides more disposable income; it appears that those who live and/or work in the county are very generous, according to United Way data.

Nevertheless, generosity among the wealthiest Howard County residents is disappointing, and an increasingly ethnically and demographically diverse population brings challenges to arts programming and marketing, particularly with regard to accessibility, affordability, and outreach.

⁸ See pages 15 and 16 for further survey results.

Recent studies show a thriving nonprofit arts community nationwide. Funding has increased and participation has grown over the past decade. This section examines the “state of the arts” nationwide, in Maryland, and in Howard County, reviewing the economic impact of the arts, and trends in funding, participation, and advocacy.

The State of the Arts Nationwide

Economic Impact

A survey released in June 2002 by Americans for the Arts, a Washington, D.C.-based advocacy group, portrays a thriving nonprofit arts community. The survey covered 3,000 local arts organizations and 40,000 arts patrons in 91 cities, but did not include the acknowledged arts centers of New York, Los Angeles, and Chicago, so as to present a more accurate nationwide picture. The survey shows that nonprofit arts groups generate approximately \$134 billion in economic activity every year, and account for 4.85 million full-time-equivalent jobs, a larger percentage of the workforce than lawyers or computer programmers. Tax revenues generated a total of \$24 billion, including \$10.5 billion to the federal government.

Funding

The survey also tracked audience spending: in addition to ticket costs, arts patrons spent \$80.8 billion on secondary expenses such as parking and restaurants. Those that traveled outside their county spent an average of \$38 per person, in addition to ticket costs, while those who attended events close to home spent \$23 per person.

As National Endowment for the Arts (NEA) support decreased in the late 1990s, the survey shows that corporate and foundation support, state funding, private donations, and local government funding increased.

Funding for the NEA increased for the first time in nearly a decade in 2001 to \$104.8 million; funding in 2003 is expected to top \$117 million.

The current economic climate, however, will undoubtedly affect all sources of arts funding in the future. For example, during the last economic downturn (1991-1993), legislative appropriations to the Maryland State Arts Council dropped more than \$3 million, with per capita support dropping from a high of \$1.53 in 1991 to 89 cents in 1993. Not until 1995 did the per capita support increase, when it reached \$1.56.

Participation

The latest year for which information is available regarding arts participation is 1997, when the NEA sponsored a nationwide survey. *The Survey of Public Participation in the Arts* sampled 12,349 people throughout the U.S.⁹

⁹ Participants were asked about attendance at the listed art forms as well as at historic parks and art/crafts fairs.

According to the survey, attendance rates over a 12-month period were:

- 35% of American adults made at least one visit to an art museum or gallery
- 25% made at least one visit to a musical theater presentation
- 16% made at least one visit to a classical music concert
- 16% made at least one visit to a theater presentation
- 12% made at least one visit to a jazz concert
- 12% made at least one visit to a modern dance presentation
- 6% made at least one visit to the ballet
- 5% made at least one visit to the opera

Personal participation rates were:

- 17% - creative photography
- 16% - painting and drawing
- 13% - dance, other than ballet
- 12% - creative writing
- 11% - classical music
- 10% - sing in choir, chorus, or other ensemble

Other survey findings:

- Audiences for all art forms except opera are aging faster than the general population, although the American Symphony Orchestra League states that the median age of the symphony audience has been in the mid-50s for many years¹⁰
- Baby boomers and post-boomers sample art forms more widely than previous age groups
- Age by itself is not a strong indicator of participation
- Education is, in every instance, the best predictor of participation in each art form
- The four most important predictors for participation are, in order of impact:
 - Education
 - Income
 - Gender (females are more likely to participate)
 - Age

Those regions reporting the highest levels of participation were the New England, Mid-Atlantic, and Pacific regions. The survey also found substantially higher participation rates for broadcast and recorded media than for live attendance: more than twice as many people listened to or watched jazz, classical music, or opera on radio or television than attended live performances.

A similar survey by the NEA was conducted in 1992. Results show that all rates of attendance were greater in 1997 than in 1992, and that the median age increased for all art forms tracked.

¹⁰ "Going Against The Graying: Arts Groups Aim For Young Patrons," *The Washington Post*, December 23, 2001.

Trends in Arts Advocacy

Public support for the arts has become a matter of public policy in the past decade, and has resulted in the doubling of state funding for the arts nationwide.¹¹ As advocates have demonstrated the benefits of arts investment in economic, social, and educational terms, public and private support for the arts has grown dramatically.

The *NASAA Advocate*, published by the National Assembly of State Arts Agencies, publishes an advocacy agenda, making the following connections between the arts and public policy:

- Research shows that children who study the arts demonstrate stronger overall academic performance.
- For young people at risk, involvement in the arts can improve academic performance, reduce school truancy, provide positive outlets and build new skills that give children a chance at a better life.
- The arts attract tourism, America's third-largest retail sales industry. Cultural tourism is a key strategy for job and economic growth.
- Data gathered from economic impact studies have repeatedly shown that the economic benefits of the arts exceed the investment of public support.

¹¹ The NASAA Advocate: *The Arts In Public Policy: An Advocacy Agenda*, 2002.

The State of the Arts in Maryland

Over the past decade, state support of the arts in Maryland almost doubled, from \$7.4 million to \$13.5 million. As of 2001, Maryland's appropriation of \$2.39 per capita ranked as eighth in the U.S. The appropriation for 2002 is \$2.52 per capita. Anticipated funding for FY 2004 is \$11 million, 9% less than the appropriation for FY 2003 of \$12.1 million.

Comparatively, in fiscal year 2001, state legislatures provided \$447.5 million in arts funding. That number dropped in 2002 to \$411.4 million, and is expected to drop further in 2003. Average per capita spending in 2002 was \$1.42.

Economic Impact and Attendance in Maryland¹²

In 2001, the nonprofit arts industry in Maryland supported 18,217 jobs, and generated \$386 million in direct spending. More than 10.6 million people attended arts events and they spent \$580 million on admission costs and secondary expenses.

In the past decade, Maryland has experienced a 70% increase in audience attendance. Arts events attracted 4.2 million more people in 2001 than they did in 1990. Regionally, central Maryland, which includes Anne Arundel, Baltimore, Carroll, Cecil, Harford, Howard counties and Baltimore City, generated \$525.5 million in expenditures and 11,092 jobs.

The Arts and Educational Reform in Maryland

In 1989, Maryland became one of the first states to require that students earn a credit in the fine arts to receive a high school diploma. Since then, the state has gained increased recognition for its commitment to fine arts education through the actions of its State Superintendent of Schools and the Maryland State Board of Education.

In 1995, the Maryland State Board of Education adopted the following goal: By the year 2000, 100% of Maryland's students will participate in fine arts programs that enable them to meet the content and achievement standards as established by state standards for the arts. By FY 1997, the State Board of Education had developed and approved these standards for dance, music, theater, and visual arts programs. The approved publication, entitled *Maryland Essential Learner Outcomes for the Fine Arts*, encompasses the outcomes, expectations, and indicators of student success in the four disciplines.

Maryland Essential Learner Outcomes for the Fine Arts

The Maryland Fine Arts Standards, which are aligned with the national standards and were created with the participation of over 1,000 Maryland teachers, are a set of documents entitled *Maryland Essential Learner Outcomes for the Fine Arts* for dance, music, theater, and visual arts for elementary, middle, and high school. They describe what children should know and be able to do in the arts by fourth grade, eighth grade, and 12th grade.

Each discipline comprises four outcomes:

1. Perceiving, performing, and responding – aesthetic education
2. Historical, cultural, and social context
3. Creative expression and production
4. Aesthetic criticism

For each of the outcomes, there are objectives, expectations, indicators of learning, and sample instructional activities.

The standards can be used as tools for curriculum development for instruction and for training teachers. For teachers, the standards provide clarity about what students need to learn, continuity of program across levels in schools, and definitions of quality.

¹² Maryland State Arts Council, *Economic Impact of the Arts In Maryland*, 2002.

In Fiscal Years 2000, 2001 and 2002, the Maryland General Assembly provided funding for Fine Arts Initiatives in all 24 school systems, contingent upon each system's development of a long-range plan to achieve the state standards in the arts. In FY 2002, the state awarded a contract to Westat, based in Rockville, Maryland, to develop an assessment system for all four areas of fine arts education at all education levels.

As of 2003, all students in Maryland public schools have access to fine arts programs, and all school systems have developed fine arts strategic plans.

The Arts Education in Maryland Schools Alliance (AEMS) has received a grant from the National Endowment for the Arts to now evaluate the schools' fine arts strategic plans. Through the work of AEMS and the Maryland State Department of Education and its partners, Maryland's efforts at achieving the Fine Arts standards will be reviewed, curricula evaluated, and best practices identified over the next two years.

STATE OF THE ARTS IN HOWARD COUNTY

At the beginning of the 21st century, the arts in Howard County appear to be flourishing, especially for audiences. Every week a smorgasbord of exhibits, literary readings, film, concerts, plays, and other performances entice local residents and arts enthusiasts from elsewhere to a range of venues from The Jim Rouse Theatre for the Performing Arts and Smith Theatre to coffee shops, local churches, and the Howard County libraries.

The variety and quality, as well as number, of offerings is impressive. In the coming months, for example, an American Indian Pow Wow will take place the same weekend as a performance of Chinese classical and folk dancing and a concert by mezzo-soprano Marilyn Horne.

Presenters include the long-established arts organizations, as well as newer groups seeking their own niche. The birth of the Fabulous 50+ Players and the Hua Sha Chinese Dance Center reflect the changing make-up of the population: older and more ethnically diverse. Indeed, the programming of the mature arts organizations also reflects this shift. In April 2003, for example, Candlelight Concerts, recognized for its chamber music series, will present a concert of wind quintet music based on Hispanic and Native American origins. The increase in diverse programming and presentation of ethnically diverse artists is a matter of pride among local arts organizations and is seen as one of the major successes of the past decade.

There are a growing number of ethnically specific organizations, such as the Korean American Association of Howard County and the Pakistani-American Arts Council, that are presenting arts programs within their own communities. These programs are not currently well-known outside of the immediate circle of the ethnic groups producing them. Most organizations, both established and newer groups, are keenly aware of the absence of audience diversity and are looking for new strategies to encourage cross-cultural participation. The barriers to successful inclusion are sometimes cultural in nature, but other factors, such as socioeconomic impediments and a sense of not belonging, may also affect participation. One-third of the members of the general public surveyed for this report, for example, indicated that “low ticket prices” influenced their attendance at arts events.

In addition to diversifying their programming, the county’s established arts organizations appear to have broadened their reach. Surveys returned by audiences at local arts events in the winter of 2003 suggest that people are traveling to Howard County to attend performances and see exhibits. Of the 96 surveys returned at the Howard County Poetry and Literature Society’s 25th annual Irish Evening on February 7, 2003, 34 came from 24 zip codes outside Howard County. The Red Priest performance presented by Candlelight Concerts on February 1, 2003, garnered 172 surveys, 34 from 21 zip codes outside the county. Of the 57 surveys returned by attendees at Howard Community College’s production of “The Italian Lesson and Other Divertissements,” 17 came from people living in 14 zip codes

There are a growing number of ethnically specific organizations, such as the Korean American Association of Howard County and the Pakistani-American Arts Council, that are presenting arts programs within their own communities.

outside Howard County. Smaller samples from other events reflected the same breakdown of 20-30% of the audience residing outside the county. The Columbia Festival of the Arts, which drew 20,000 attendees in 2002, attracts over 50% of its audience from outside the county, according to festival staff reports.

Development of arts organizations is also reflected in size of audiences, number of artists featured, and money generated from admissions, contributions, and grants. In 1991, through its Community Arts Development (CAD) grant program, HCAC awarded \$106,200 to a total of 13 grantees. The grantees reported combined attendance of 65,107, with 1,479 artists served. Revenues generated that year by grantees totaled approximately \$1 million.

As Howard County's population has grown over the last decade, arts attendance skyrocketed, as did the number of arts organizations. While Howard County's population increased 13% between 1995 and 2000, attendance at arts events increased 90%.¹³ By 2001, there were more than 100 nonprofit and for-profit arts organizations in the county, including performance and visual arts groups, galleries, presenters, and producers.¹⁴

While Howard County's population increased 13% between 1995 and 2000, attendance at arts events increased 90%.

By FY02, HCAC nearly doubled its CAD grantees to 27 and awarded them a total of \$204,925. In terms of local (county) government support, Howard County, at \$359,376, ranks second in the state in per capita arts spending at \$1.43, behind Baltimore County at \$2.72.¹⁵ The CAD grantees reported attendance of 252,935 with 2,086 artists served, 890 of which were Howard County residents. Revenues generated that year by grantees totaled over \$3.1 million. Audiences spent approximately \$500,000 on admissions, which generated an additional \$1.1 million in secondary spending.¹⁶

Data from the Howard County Arts Council also show that a significant number of Howard County residents travel to Baltimore's arts and cultural institutions. In fact, more than 10% of the people who visit the Baltimore Museum of Art and attend Baltimore Symphony Orchestra concerts come from Howard County. Respondents surveyed at Howard County arts events indicated that 12% are subscribers, members or donors to arts organizations in Baltimore City and 7% to arts organizations in Washington, D.C.

Of the Howard County residents surveyed at arts events, 43% indicated their households spent more than \$51 per month on tickets, fees or admissions to arts events; 16% spent more than \$100 per month.

¹³ Statistics from nonprofit arts organizations that receive funding from the Howard County Arts Council.

¹⁴ Data from the Howard County Arts Council's *Directory of Howard County Arts Programs and Resources*, 2002.

¹⁵ Not including capital funds appropriated to the arts.

¹⁶ Based on calculations described in *Economic Impact of the Arts in Maryland*, Maryland State Arts Council, 2002.

Revenue sources for Howard County organizations funded by the Howard County Arts Council in FY 2002 were as follows:

- 7.5% individual contributions
- 15.9% corporate support¹⁷
- 12% foundation support
- 8.4% state support
- 1% federal support
- 11% Howard County Government, administered through the Howard County Arts Council
- 30% other sources, including class fees, rentals, etc.
- 15% admissions

Americans for the Arts reports that, on average, nonprofit arts organizations receive 24.9% of their funding from all private sources, i.e., individuals, foundations, and corporations; 8.7% from federal, state and local public sources; and 66.4% from earned income, i.e., ticket sales, memberships, advertising, and endowments.¹⁸

Howard County's arts organizations report that they receive 35.4%¹⁹ of their funding from private sources; 20% from public sector support; and 45% from earned income.

Support for the arts is one barometer of their significance in a community, and some of the major touchstones of support – attendance figures and revenues – evidence a growth in local support for arts organizations over the past decade. Credit for such support is given to advocacy efforts which have garnered greater recognition and appreciation of the arts in Howard County. Name recognition of the Howard County Arts Council, for example, was 82% among the general public surveyed and 90% among those surveyed at county arts venues. In 1989, name recognition of the Howard County Arts Council was 52% among the general public surveyed for *ArtsVision 2001*.

Ironically, the strain on existing facilities as a result of the growth in arts organizations, programming and audiences continues to make it difficult for individual artists living and working in Howard County to find affordable rehearsal and studio space. The number of artists appears to be increasing, as well. Of the attendees surveyed at arts venues, 42% identified themselves as artists or participants in arts production.

The maturing of Howard County's largest arts organizations has led to new issues. Leadership transition and board development have been identified as major challenges of the years ahead, as some of the founders of Howard County's premier arts groups prepare to retire after a quarter of a century or more at the helm. There is concern that groups will not

Leadership transition and board development have been identified as major challenges of the years ahead, as some of the founders of Howard County's premier arts groups prepare to retire after a quarter of a century or more at the helm.

¹⁷ The Columbia Festival of the Arts receives a significant amount of corporate support; when the Festival is factored out, the percentage of corporate support for the arts in Howard County is 5.8%.

¹⁸ Americans for the Arts: *National and Local Profiles of Cultural Support: Executive Summary*. Study conducted between 1999 and 2001.

¹⁹ The Columbia Festival of the Arts receives a significant amount of corporate support; if the corporate support for the Festival is factored out, the percentage of private support is 25.3%, in line with the national average.

be able to afford to replace current leadership. As one of the focus group participants noted, “Passion is the psychic income for founders, but it is not enough for successors.”

Organizational capacity rests with identifying new funding sources but also with identifying new leadership. Over 200 civic leaders are currently serving on boards of directors of arts groups funded by HCAC, many from the business community, educational institutions and government, as well as from the arts community. Such diversity – as well as diversity of race, ethnic and cultural background, gender and age – is considered essential to the continued growth and success of Howard County’s arts organizations.

Ultimately, however, the future of the arts in Howard County rests with education. Education of our young people is seen as the factor most critical to the future prosperity – if not survival – of the arts.

Arts Education in Howard County

Myriad opportunities for arts education exist in Howard County: arts in the public schools; pre-performance lectures; dance classes; children’s camps; museum tours; and community college classes. Classes for children, adults, and seniors are offered by many institutions – and *ArtsVision: State of the Arts* participants believe that the residents of Howard County take advantage of these programs. Enrollment in fine arts classes at Howard Community College (HCC) increased 40% in 2001 and an additional 23% in 2002. HCC and Howard County government are investing in a new Visual and Performing Arts building, slated to open in 2005.

From the public schools to community organizations, arts education programs abound. Of survey respondents who said they or their children had taken classes in the arts in the past three years, 58% of the general public identified college, community site or home as the venue, while 79% of the arts enthusiasts did the same.

Howard County Public School System

The Howard County Public School System (HCPSS) is well-regarded for its fine arts curriculum and its fine arts enrollment. Its fine arts programs are based on the *Maryland Essential Learner Outcomes for the Fine Arts* (see page 18), and exceed the state general curriculum requirements for grades 1 through 8: every school in Howard County has certified arts specialists to teach music and visual arts. Instructional Facilitators work with for- and nonprofit arts organizations through the HCPSS Business Partnership program, bringing various kinds of arts experiences to students. In addition, the Visual Arts program maintains an official partnership with the Howard County Arts Council. The Arts Council also works with PTAs throughout the county, offering a showcase of performers for in-school programs, as well as an Artist-in-Education grant program.

Every year, from grade 1 through grade 8, every child in the Howard County Public School System has direct experience of art and music through class instruction. In addition, these students may have more direct experience if they choose to join the chorus or play a musical

instrument in the band. At the high school level, by state regulation, each student must have one fine art credit in any of the four disciplines (music, dance, theater, or visual arts) to graduate. Currently, 7,392 students are enrolled in band, 11,415 in chorus, and 4,335 in string programs at all grade levels. More than 33,000 students at the elementary and middle school levels take general music and visual art classes. Another 3,926 high school students are enrolled in art classes, as well as 1,276 in dance. Theater classes are also offered at the high school level.

A calendar of events is offered online (www.howard.k12.md.us), and distributed to senior centers; seniors are admitted free to any school fine arts event. Community attendance is high, with more than 150,000 people estimated to have attended music events in the past year.

Recognizing that demand for fine arts classes sometimes exceeds the staffing available, the HCPSS is working towards solutions – surveying need, adding staff, and moving towards a more centralized system that will address inconsistencies in class availability from school to school. The HCPSS is also working towards developing partnerships and mentoring programs for fine arts students and summer school programs, as currently exist in the Gifted and Talented program.

Lifelong Learning Opportunities

Arts education in Howard County covers a broad range of offerings. From dance studios to private music teachers, from the Howard County Arts Council to Howard Community College, classes are available for all age groups. Pottery, painting, piano, guitar, music appreciation, kids camps – the scope is remarkable. A quick glance at some of the major institutions in the county provides a sampling of the offerings.

The Howard County Department of Recreation and Parks Spring/Summer Guide lists movement, dance, and creative arts classes for children as well as dance, drama, and music camps. Classes for adults include dance, drawing and painting, photography, and music, while seniors are offered creative arts, crafts, and dance. Trips and tours are offered as well, some of which visit museums and cultural events.

Howard Community College offers a number of noncredit classes, some of which are free to seniors. These classes include beginning music instruction, music appreciation, crafts, dance, and theatre – and, this spring, a calligraphy course taught in Korean.

The Columbia Art Center classes and workshops include field trips and classes for both adults and students in clay, jewelry-making, painting, ceramics, and stained glass.

Arts education in Howard County is not limited to educational institutions: many arts presenters offer educational programs as part of their season schedules in order to enhance understanding and build audiences. The Columbia Festival of the Arts, for example, offers master-classes and workshops, while Candlelight Concert Society regularly schedules pre-concert lectures.

The arts community and its patrons recognize the value of continuing education in the arts as well as the value of educating our young people, as do the residents of Howard County. Survey results show that 42% of the arts enthusiasts or their children have taken classes in the arts in the past three years, while 40% of the general public has.

In conclusion...

The nonprofit arts community is thriving in Howard County, in Maryland, and nationwide. The data gathered affirms that the wealthy and educated residents of the county and the region are arts supporters. Of the Howard County residents surveyed at arts events, for example, 61% had achieved a post graduate level of education, and 37% had an average household income over \$100,000.

Maryland ranks 8th in the US in per capita arts spending by state government, and in the past decade, audiences have grown by 4.2 million people. The State of Maryland has gained increased recognition for its commitment to arts education in the schools, and Howard County's commitment to arts education in the public schools is well-documented.

Howard County's arts community is healthy and well-supported. Attendance has increased in the past decade and local public funding from Howard County Government ranks the county 2nd in the state, well above the national averages. The residents of Howard County appear to value continuing education in the arts, as well as arts education in the public schools.

As noted by the National Assembly of State Arts Agencies, one of the most important developments in the past decade is that public support for the arts has become a matter of public policy. Policy-makers and community leaders recognize the enormous economic impact of the arts – in tax income, secondary spending (restaurants, gas, and lodging), and tourism dollars – as well as its impact on academic performance and general quality of life.

Challenges do exist, however. Howard County's arts organizations' revenue from earned income is well below the national average. In addition, the state of the local and national economy affects appropriations to the arts from public sources. In times of economic decline, non-profit arts organizations that are already operating on tight budgets may have to stream-line operations even further.

Howard County will continue to experience demographic and ethnic changes, and this increasing diversity will require thoughtful, creative, and proactive responses to ensure the continued growth and success of the arts in the county.

Introduction

During the assessment process, Jean Moon & Associates sent out surveys and conducted numerous interviews and focus groups in order to gather information and identify future goals for the arts in Howard County. The consultants distributed a survey instrument to 156 arts organizations and leaders in the county designed to record their perception of change in the arts community. In addition, 30 45-minute interviews and eight focus groups were held with community and arts leaders. The Steering Committee and the Howard County Arts Council Board of Directors evaluated the results and perceptions. More than 135 people were directly involved in the *ArtsVision: State of the Arts* process, and an additional 898 Howard County residents responded to surveys distributed to arts patrons and the general public.

Overall, *ArtsVision: State of the Arts* participants believe that the arts community in Howard County has prospered and grown over the last decade. Challenges remain, however. *ArtsVision: State of the Arts* participants noted that funding, leadership issues, audience development, arts education for youth, space limitations, and issues around diversity were of top priority.

The following goals, strategies, recommendations, and indicators take these challenges into account and are meant to serve as a guide for artists and arts organizations as they plan for their future and work to capitalize on their resources. Indicators are included as a way to track success over time. Specific resources for more detailed guidance are included in the section “Resources for the Arts.”

ArtsVision: State of the Arts participants offered many ideas for implementation over the course of the project. A selection of these ideas is included with each goal.

ADVOCACY

ArtsVision participants believe that advocacy for the arts remains an important function of artists, arts organizations and their supporters. Participants recognize that increasing awareness of the arts and linking the arts to economic development and quality of life issues are critical to the health of the arts community. Survey respondents believe that “satisfactory” to “very good” progress has been made with regard to recognition and appreciation of the arts, and in building alliances with regional organizations.

Goal: Speak For the Arts

GOOD IDEAS

- Develop fundraising and promotional materials that promote the impact of the arts in terms of economic development, educational achievement, community health and wellness, and other quality of life issues.
- Join with Maryland Nonprofits, the Association of Community Services of Howard County, Maryland Citizens for the Arts and other advocacy organizations to raise the profile of arts organizations and to advocate for funding.
- Create a Business or Government Affairs Committee for the Arts to assist with advocacy efforts.

STRATEGIES

1. Increase awareness of the value of the arts for economic development, educational achievement, community health and wellness, and other quality of life issues.
2. Advocate for public and private funding of the arts at the local, state, and national levels.
3. Advocate for public policy initiatives to benefit the arts at the local, state, and national levels.

RECOMMENDATIONS

1. Research and collect data supporting the impact of the arts on quality of life issues.
2. Encourage people who are involved in the arts to participate in advocacy efforts.
3. Identify and recruit leaders within the government and corporate communities who will assist with advocacy efforts.
4. Keep elected officials educated about and informed of local artists and arts events.
5. Build alliances with local and regional advocacy and arts organizations to speak for the arts.
6. Join with business, government and nonprofit agencies to advocate on behalf of arts funding and public policy initiatives.
7. Promote volunteerism in the arts.

INDICATORS

- Levels of government, corporate, foundation, and individual contributions
- Number of individual, government, and corporate advocates and patrons
- Level of participation with local and regional advocacy and arts organizations and/or in local and regional advocacy efforts

ART-IN-PUBLIC-PLACES

Art-in-Public-Places programs are developed to bring the vision and talent of artists out of galleries and museums and into communities. Generally, these artworks are in the form of permanent installations of sculpture, mosaics, or murals that enrich and enliven public areas, both interior and exterior, such as airports, transit lines, libraries, fire stations, and government buildings. Public art programs are often created by legislation that allocates a small percentage of construction funds for artworks.

ArtsVision: State of the Arts participants believe that the development of an art-in-public-places program would be of value to the arts and to the broader community.

Goal: Create Art-In-Public-Places Programs in Howard County

STRATEGIES

1. Research best practices and successful models for creating public art programs.
2. Assess feasibility of creating a public art program.

RECOMMENDATIONS

1. Identify models from across the U.S. where art has been incorporated into built environments.
2. Educate the public about the value of public art programs.
3. Recruit a committee to oversee a feasibility study and make recommendations.
4. Develop partnerships with interested individuals, and arts and non-arts organizations.
5. Advocate for public policy initiatives that support public art programs.

INDICATORS

- Development of Art-In-Public-Places Programs
- Number of public art installations

GOOD IDEAS

- Host events or lectures featuring the work of successful public art programs.

ARTISTS

Artists working in all media face challenges: finding work, securing rehearsal and studio space, and enhancing skills. Survey respondents believe that artists are less isolated than they were a decade ago, and that “very good” progress has been made including ethnically and culturally diverse artists in programming. Availability and affordability of rehearsal and studio space continues to be an issue. *ArtsVision: State of the Arts* participants believe that it is important for the community of Howard County to value and support its artists.

Goal: Foster Individual Artistic Expression

GOOD IDEAS

- Participate in existing artist registries and directories.
- Attend arts roundtable discussions and other free networking events.
- Become involved with arts and arts advocacy organizations.

STRATEGIES

1. Increase opportunities for artists to live, work, study and present their work in Howard County.
2. Provide professional development opportunities for artists.
3. Provide opportunities for dialogue between and among artists and the public.

RECOMMENDATIONS

1. Encourage artists to be pro-active both in terms of arts advocacy and career advancement.
2. Take advantage of community resources that inform artists about potential work, funding and technical assistance, and exhibit and performance opportunities.
3. Encourage public agencies and businesses to collect and commission the work of Howard County artists.
4. Encourage non-arts organizations to showcase the work of local artists.
5. Encourage arts and non-arts organizations to continue to commission and showcase new works by individual artists.
6. Look for ways to increase funding opportunities for individual artists.
7. Encourage artists to build professional relationships and partnerships, both locally and regionally.
8. Encourage artists to serve on boards and committees.
9. Encourage artists to enhance their management and marketing skills.
10. Educate arts audiences and patrons about the important contributions artists make in the community.
11. Keep elected officials educated about and informed of local artists and arts events.
12. Develop multi-disciplinary projects that involve individual artists.

INDICATORS

- Number of artists showcased in the community
- Number of Howard County artists included in public and corporate collections
- Number and type of programs that involve individual artists
- Number of new works or projects that involve individual artists

ARTS ORGANIZATIONS

Leadership issues and organizational capacity are of primary concern to *ArtsVision: State of the Arts* participants, although most participants believe that county arts organizations have become stronger in the last decade. A majority of survey respondents believe that “satisfactory” progress has been made in all areas: artistic programming, interdisciplinary efforts, use of nontraditional spaces, board diversity, and long-range planning. At the same time, arts groups recognize their vulnerability because of funding uncertainty and leadership recruitment challenges.

Goal: Strengthen Arts Organizations

STRATEGIES

1. Strengthen administrative, programmatic, and management practices to build organizational capacity.
2. Raise the profile of arts organizations in the larger community.
3. Diversify the funding base.
4. Continue to build professional relationships and partnerships, both locally and regionally.

RECOMMENDATIONS

1. Develop long-range plans that include administrative and artistic goals, as well as leadership transition plans.
2. Improve board recruitment and development.
3. Enhance the administrative, technological, marketing and fundraising expertise of board and staff.
4. Join with arts and non-arts organizations to raise the profile of arts organizations and to advocate on behalf of arts funding and public policy initiatives.
5. Strengthen volunteer programs and recruitment.
6. Avoid duplication of services and investigate ways to “pool” resources with other arts and non-arts organizations to defray administrative, fundraising, and marketing costs.

INDICATORS

- Number of arts organizations with long-range plans in effect
- Number of arts organizations in existence for 20 or more years
- Level of corporate and business representation on Boards of Directors
- Audience/attendance numbers and demographics
- Levels of earned and contributed income
- Number of partnerships developed with other organizations
- Number of paid full-time or full-time equivalent positions, number of full-time or full-time equivalent administrative volunteer positions, number of special event volunteers

GOOD IDEAS

- Create a Business Volunteers for the Arts organization.
- Participate in free and low-cost seminars and workshops about Board development, administrative issues, marketing, and fundraising.
- Work with area volunteer programs to recruit board members and other volunteers: Leadership Maryland, Leadership Howard County, the Volunteer Center Serving Howard County.
- Attend networking activities at the Chamber of Commerce and other business groups.

EDUCATION

Education in the arts, particularly education of our young people, is seen as the factor most critical to the future prosperity – if not survival – of the arts. Survey respondents state that “satisfactory” progress has been made in the number of student performances and exhibits and in the cultural diversity of the arts curriculum. However, respondents were not in agreement that public arts education is funded appropriately, with equal numbers believing that little or no change had occurred and that “satisfactory” progress had been made. In addition, some participants were concerned with insufficient arts staffing in certain schools, and inconsistent access to arts programs at the high school level, as well as inconsistent allocation of resources from school to school.

With regard to life-long learning opportunities, *ArtsVision: State of the Arts* participants believe that there are many offerings and good instruction available at many venues. Survey respondents agree, noting “satisfactory” progress in performance and exhibition opportunities for all levels of participants.

Goal: Provide Opportunities for Life-long Learning

GOOD IDEAS

- Include links to arts organizations’ web sites on the Howard County Public School System’s web site.
- Advocate for full-time Instructional Facilitators in dance and theater, as exist for music and visual arts in the Howard County Public Schools.
- Encourage more arts groups to join the Howard County Public Schools Business Partnership program.
- Develop mentoring and partnership programs for fine arts students, as exist for the Gifted and Talented program.
- Speak out in support of arts funding and initiatives at school board meetings and elsewhere.

STRATEGIES

1. Continue to develop educational and participatory experiences in the arts for people of all ages, abilities, and socio-economic backgrounds.
2. Continue to develop and strengthen K–12 arts curriculum programs in the Howard County schools and recognize that the arts are a core part of the curriculum.

RECOMMENDATIONS

1. Develop more courses and workshops for people of all ages, abilities and socio-economic levels, including opportunities for advanced as well as beginning participants.
2. Develop marketing efforts, programs, and incentives to encourage people of all ages, abilities, and socio-economic backgrounds to participate in the arts.
3. Ensure all types of accessibility: present activities in accessible places and provide sign language interpreters and assistive listening devices; consider financial accessibility, availability of transportation, and timing of programs.
4. Continue to educate arts audiences, both formally and informally, about the arts and artists to enhance their interest in and appreciation of various art forms.
5. Increase artistic education programming for pre-school children; work towards providing a full range of experiences in the arts.
6. Develop more after-school and weekend programs for school-age children.

7. Advocate for increased emphasis on and adequate funding for arts programs in the public schools: promote the value of the arts in educational achievement.
8. Work towards equal access to fine arts programs throughout public and private schools.
9. Increase the number of formal collaborations among artists, arts organizations and all educational facilities, from pre-school through community college.
10. Include exposure to primary arts experiences – performances and exhibitions – as part of the public and private school arts curriculum.

INDICATORS

- Number and type of arts educational programs offered by arts and community organizations
- Levels of participation and demographics of participants in educational programs offered by community organizations
- Levels of arts program funding in schools and Howard Community College
- Fine arts enrollment in primary and secondary schools and Howard Community College
- Number and type of arts programs in primary and secondary schools and Howard Community College

ETHNIC DIVERSITY

Since *ArtsVision 2001* was released, there has been greater awareness and recognition of multiculturalism in Howard County. As one participant stated, “There is no organization that doesn’t consider multiculturalism in programming.” Survey respondents agreed, with a majority noting “very good” progress in inclusion of ethnic and culturally diverse artists and programming. In addition, as the population has become increasingly diverse, new ethnic and cultural organizations have developed and provide arts programming for their constituents. Most organizations, including ethnically specific organizations, have not seen a significant increase in audience diversity.

As noted under Marketing, *ArtsVision: State of the Arts* participants recognize the importance and impact of the significant demographic changes that occurred over the last 10 years.

GOOD IDEAS

- Develop a directory of ethnic and cultural resources in Howard County.
- Encourage ethnically and culturally diverse artists and arts organizations to participate in existing calendars and directories.
- Partner with arts or cultural organizations to produce jointly sponsored cross-cultural events.

Goal: Embrace and Celebrate Ethnic and Culturally Diverse Artistic Expression, Recognizing its Contribution to the Broader Community

STRATEGIES

1. Continue efforts to ensure that culturally diverse artists and art forms are presented.
2. Continue to integrate ethnically and culturally diverse art and culture in K–12 and higher education curricula.
3. Foster communication and collaboration among diverse cultural arts groups.
4. Provide leadership opportunities in the arts for people of ethnically and culturally diverse backgrounds.

RECOMMENDATIONS

1. Continue to program a variety of exhibits, performances, and educational programs to attract ethnically and culturally diverse audiences, including events that feature a mix of ethnic and cultural groups.
2. Develop community outreach and marketing strategies for specific target audiences, working with diverse arts leaders, ethnic organizations, and media.
3. Build cross-cultural partnerships with ethnic arts and community organizations to foster communication and collaboration.
4. Educate audiences, both formally and informally, about ethnically and culturally diverse arts and artists to enhance their interest in and appreciation of those art forms.
5. Include exposure to ethnically and culturally diverse primary arts experiences – performances and exhibitions – as part of the pre-K–12 and higher education arts curriculum.
6. Cultivate and recruit people of ethnically and culturally diverse backgrounds for board and committee positions.

INDICATORS

- Number of arts programs presented by community organizations that feature ethnic or culturally diverse artists or art forms
- Audience numbers and demographics
- Number of cross-cultural partnerships with ethnic arts and community organizations
- Number and type of ethnic or culturally specific arts programs in the schools

FUNDING

Adequate funding to support the arts, artists, and arts organizations continues to be a top priority. Survey results show that a majority of arts leaders believe that little or no progress has been made with regard to improving fundraising efforts – and that state government does not adequately fund the arts. Arts organizations in Howard County, however, compare favorably with the arts organizations nationally as reported by Americans for the Arts. Arts organizations in Howard County report that they receive 35.4% of their funding from private sources compared to 24.9% nationally and 20% from public sector support, exceeding the national average of 8.7%. Only the percentage of funding from earned income is lower, averaging 45% in Howard County against 66.4% nationally.

Goal: Develop and Sustain a Diverse Funding Base for the Arts

STRATEGIES

1. Advocate for a stable and increasing government funding base.
2. Develop funding strategies that increase individual, foundation, and corporate support.
3. Promote the important contributions that the arts make to economic development, educational achievement, community health and wellness, and other quality of life issues.
4. Increase government, foundation, and corporate understanding of the value of partnering with the arts.
5. Investigate and develop sources for earned income.

RECOMMENDATIONS

1. Advocate for public and private funding of the arts at the local, state and national levels.
2. Keep elected officials educated about and informed of local artists and arts events.
3. Develop local and regional partnerships with arts and non-arts organizations to raise the profile of the arts and to advocate on behalf of arts funding and other support.
4. Identify and recruit leaders within the corporate community to assist with advocacy and fundraising efforts with their peers.
5. Develop donor programs geared specifically to individual donors.
6. Encourage arts organizations to work together to explore group funding opportunities.
7. Enhance the fundraising skills of the board and staff of arts organizations.

INDICATORS

- Levels of government, corporate, foundation, and individual contributions
- Levels of earned income
- Diversity of funding sources

GOOD IDEAS

- Include links to donor sites on arts organizations' web sites.
- Investigate group funding opportunities to create a central box office.
- Create an endowment fund or planned giving program.
- Participate in free or low-cost fundraising seminars and workshops offered by local and regional agencies.

HOWARD COUNTY ARTS COUNCIL

The Howard County Arts Council has two primary functions. As a non-profit 501(c)(3) organization, it functions programmatically and organizationally like any other arts organization in the county and faces the same program, funding, and administrative challenges. As the local agency authorized by county code to administer county and state funds designated for the arts, the Arts Council also functions as a facilitator to advance the arts in the community. Therefore, the strategies, recommendations and indicators listed below serve a dual purpose: they are used to judge the success of the Arts Council's own programs as well as to assess the success of county-wide initiatives facilitated through its grant and advocacy efforts.

**Goal: Support the Mission of the Howard County Arts Council,
Which is to Serve the Citizens of Howard County by Fostering the Arts,
Artists and Arts Organizations.**

STRATEGIES

1. Develop initiatives that foster the arts and encourage community-wide participation in the arts.
2. Advocate on behalf of public and private funding for the arts and public policy regarding the arts.
3. Strengthen the foundation for community-based arts to insure Howard County citizens have access to the arts.
4. Expand and diversify the Arts Council funding base.
5. Increase awareness of the Arts Council and its programs and activities.
6. Strengthen and expand the programmatic and organizational capacities of the Arts Council.

RECOMMENDATIONS

1. Act as an advocate and facilitator for the arts.
2. Embrace and promote diversity in the arts.
3. Promote and support lifelong-learning in the arts.
4. Promote the value and impact of the arts.
5. Work with Howard County Government, and other public and private agencies, to advance the arts in Howard County.
6. Manage and operate the Howard County Center for the Arts.
7. Provide grants to foster the arts.
8. Encourage the development of initiatives that enable artists and arts organizations to become more self-sufficient.
9. Convene arts communities to improve communication among and between diverse groups and to monitor growth and needs.
10. Encourage partnerships with and between public and private organizations in the interest of supporting the arts.
11. Investigate ways to further expand and diversify the Arts Council's funding base.

INDICATORS

- Audience/attendance numbers and demographics
- Levels of earned and contributed income
- Number of public and private partnerships
- Number of advocates and donors
- Level of participation with local and regional advocacy and arts and non-arts organizations
- Number of artists showcased
- Number and range of media reviews
- Number and type of arts programs

MARKETING AND AUDIENCE DEVELOPMENT

Survey participants gave arts organizations high marks in audience development, with a majority believing that “satisfactory” or “very good” progress had been made in the areas of marketing, media coverage, low-cost activities, family programming, and geographic balance. Audiences have grown and educational activities – both formal and informal – are a mainstay of programming for many organizations.

Survey results indicate that more than seven out of 10 Howard County residents depend upon newspapers to find out about arts events. “What is presented” remains the number one determinant in attending an event, with eight out of 10 respondents selecting it as a factor.

Among the options, “low tickets prices” came in fifth place as an attendance determinant for the general public, with 33% citing it as a factor. Arts enthusiasts gave “low tickets prices” less significance, with 21% saying it may determine attendance. “Proximity to home” and “time of event,” were cited by almost half of the respondents as factors influencing attendance.

Half of the survey respondents from the general public say they attend events intended for children, families or all ages, and half attend programming for adult or for senior audiences. Seven out of 10 arts enthusiasts, on the other hand, attend events intended for adults.

Most *ArtsVision: State of the Arts* participants see marketing and audience development as a continual challenge. While participants believe arts organizations have been successful at presenting more ethnically and culturally diverse artists and art forms, organizations have not been able to significantly increase ethnic diversity in their audience base. They are also concerned about building youth audiences, and perceive that popular culture draws this demographic away. *ArtsVision: State of the Arts* participants note the importance of responding to the significant demographic changes that have occurred over the last 10 years and believe the arts community will have to develop creative approaches to reach new audiences.

Goal: Develop New Arts Audiences

STRATEGIES

1. Improve and diversify marketing skills of artists and arts organizations.
2. Continue efforts to reach out to underserved and non-traditional audiences.
3. Create opportunities for people of all ages, abilities, and socio-economic backgrounds to participate in the arts.

RECOMMENDATIONS

1. Enhance marketing skills of artists and arts organizations.
2. Use web-based technology to market programs.
3. Survey and assess audiences on a regular basis.
4. Increase quality of arts programs.
5. Increase diversity of arts programs, appealing to a broad spectrum of audiences, including underserved and non-traditional audiences.
6. Produce multi-disciplinary and multi-media arts presentations that appeal to all ages.
7. Develop marketing efforts and programs that reach out to target audiences, including people with disabilities and ethnic, youth, senior, and low income populations, and work with agencies and organizations serving these populations.
8. Ensure all types of accessibility: present activities in accessible places and provide sign language interpreters and assistive listening devices; consider financial accessibility, availability of transportation, and timing of events.
9. Support public policy efforts regarding accessibility issues.
10. Bring artists and audiences together informally.
11. Continue to educate audiences, both formally and informally, about the arts and artists to enhance their interest in and appreciation of various art forms.
12. Enhance volunteer programs to build community participation, reaching out to underserved and non-traditional audiences.

INDICATORS

- Audience/attendance numbers and demographics
- Ticket sales
- Number and range of media reviews
- Numbers of volunteers

GOOD IDEAS

- Develop a web presence.
- Take the show “on the road” to non-traditional venues.
- Evaluate compliance with ADA: develop materials that state available accommodations; participate in training programs as necessary.
- Use the online calendars of the Greater Baltimore Cultural Alliance, Cultural Alliance of Greater Washington, Howard County Tourism Council, Howard County Library, and Maryland Public Television.
- Pool resources to create group display ads.
- Research other groups’ innovative ideas and borrow them.
- Develop daytime programs for seniors.

SPACE

In 1997, The Jim Rouse Theatre for the Performing Arts opened at Wilde Lake High School. The development of this new space, one of the principal goals of the original *ArtsVision 2001* plan, is widely regarded as a turning point in venue development in Howard County. In the past decade, a number of other spaces were also developed, expanded, or renovated: Slayton House, the Howard County Center for the Arts, Howard Community College’s Theatre Outback and Drier Stage, Glenelg Country School’s Mulitz Theatre, the Columbia Art Center, the Artists’ Gallery, and the outdoor stage at Centennial Park. In addition, one of the more exciting developments has been the use of non-traditional spaces for arts activities such as churches, libraries, restaurants, and coffee shops.

Seven out of 10 Howard County residents surveyed for this report say that “the arts in Howard County are meeting the needs of the community.”

Development of arts spaces continues with the planned opening of Howard Community College’s Visual and Performing Arts building in 2005. This building, projected to cost \$19.5 million, will include a black box theater, recital hall, dance studios, gallery space, and visual arts studios.

ArtsVision: State of the Arts was not designed to be a facility needs assessment, so issues of space were not fully studied or documented during the course of this project. However, a majority of survey respondents believed that little or no progress has been made with regard to availability and affordability of rehearsal, work, and performance spaces – even with the development of new spaces. Concern was expressed about the loss of Savage Mill and nearby Oella Mill studio space for visual artists, as well. *ArtsVision: State of the Arts* participants believe that a new assessment of space and space needs for the arts should be undertaken.

Goal: Identify and Develop Appropriate Spaces for the Arts

STRATEGIES

1. Maintain existing arts spaces and ensure accessibility.
2. Conduct a facility needs assessment and feasibility study in order to define space needs for the arts and the community and to determine the capital and operating costs needed to sustain them.
3. Advocate for the creation of an “Arts & Entertainment District” in Howard County.

INDICATORS

- Number of designated arts spaces
- Development of facility needs assessment and feasibility study

Please note that this is a representative list of resources and is not comprehensive. Contact information is subject to change.

The American Arts Alliance

1869 Park Road NW
Washington, DC 20010
Tel: (202) 387-8300 | Fax: (202) 797-9856
www.americanartsalliance.org

The mission of the American Arts Alliance is to be the principal advocate for America's professional nonprofit arts organizations and their publics in representing arts interests and advancing arts support before Congress and other branches of the Federal government.

Americans for the Arts

Washington Office
1000 Vermont Ave. NW, 6th Floor
Washington, DC 20005
Tel: (202) 371-2830 | Fax: (202) 371-0424
www.artsusa.org

Americans for the Arts is the nation's leading arts information clearinghouse, with a 40-year record of objective arts industry research. As the preeminent arts advocacy organization, it is dedicated to representing and serving local communities and creating opportunities for every American to participate in and appreciate all forms of the arts.

American Symphony Orchestra League (ASOL)

Washington Office
910 17th Street N.W.
Washington, D.C. 20006
Tel: (202) 776-0215 | Fax: (202) 776-0224
www.symphony.org

ASOL provides leadership and service to American orchestras while communicating to the public the value and importance of orchestras and the music they perform. The League provides services, information and data, and educational opportunities.

Arts Education in Maryland Schools Alliance (AEMS)

616 Water Street, Suite 321
Baltimore, MD 21202
Phone: (410) 783-AEMS (2367) | Fax: (410) 783-0275
www.aems-edu.org

AEMS strives to support the Maryland State Department of Education (MSDE) Goal approved in 1995 that “all students will have the opportunity to participate in programs that enable them to meet Maryland content and achievement standards in the arts.” AEMS works in close conjunction with the Maryland Fine Arts Education Advisory Panel to implement the MSDE Board policy on arts education. In addition, AEMS serves as a resource for local school systems.

Association of Baltimore Area Grantmakers (ABAG)

2 East Read Street, 8th floor
Baltimore, Maryland 21202
Tel: (410) 727-1205 | Fax: (410) 727-7177
www.abagmd.org

ABAG's primary purposes are to strengthen and promote organized private philanthropy in Central Maryland. ABAG offers information about regional grantmaking and trends in giving.

Association of Community Services of Howard County (ACS)

6620 Amberton Dr.
Elkridge, MD 21075-6216
Tel: (410) 796-7824 | Fax: (410) 379-1308
www.acshoco.org

ACS is a network of human service providers, community organizations, government agencies, and citizen advocates who work together to advance human services through advocacy, education and member services. ACS offers free or low-cost workshops on fundraising and board development, and maintains a Board bank.

Baltimore Theatre Alliance (BTA)

P.O. Box 5982
Baltimore, MD 21282
Tel: (410) 342-4416 | Fax: (410) 342-0513
www.baltimoreperforms.org

BTA is a nonprofit organization dedicated to supporting and promoting theater in the greater Baltimore area. BTA publishes a calendar, quarterly newsletter, posts audition notices, and offers workshops.

Chorus America

1156 15th Street, NW, Suite 310
Washington, DC 20005
Tel: (202) 331-7577
www.chorusamerica.org

Chorus America serves the spectrum of professional, volunteer, children/youth, and symphony/opera choruses. Chorus America provides information, publications, conferences, consulting, training programs, surveys, networking, and awards to support choruses in North America.

The Columbia Foundation

10221 Wincopin Circle, Suite 100
Columbia, MD 21044
Tel: (410) 730-7840 | Fax: (410) 715-3043
www.columbiafoundation.org

The Columbia Foundation is a public foundation that supports organizations and agencies that contribute to the quality of life in Howard County. Grants are issued to nonprofit organizations delivering services to Howard County residents in the human service, cultural, educational or community affairs areas.

Cultural Alliance of Greater Washington

1436 U Street NW, Suite 103
Washington, DC 20009
Tel: (202) 638-2406 | Fax: (202) 638-3388
www.cultural-alliance.org

The Cultural Alliance of Greater Washington is a regional arts service organization working on behalf of artists, cultural arts organizations, and the community. Its programs include health care, a job bank, arts management workshops, the National Arts Marketing Project, Business Volunteers for the Arts in Washington, and TICKETplace, a half-price ticket outlet.

Foreign-born Information and Referral Network (FIRN)

5999 Harpers Farm Road, Suite E-200
Columbia, MD, 21044
Tel: (410) 992-1923 | Fax: (410) 730-0113
www.firnonline.org

The mission of FIRN is to assist recent immigrants to Howard County, Maryland in the slow and sometimes frustrating process of becoming Americans. FIRN offers comprehensive assistance related to employment, housing, basic needs, immigration and interpretation/translation.

Grantmakers in the Arts (GIA)

604 West Galer Street
Seattle, WA 98119-3253
Tel: (206) 624-2312 | Fax: (206) 624-5568
www.giarts.org

GIA is a nonprofit membership organization comprised of private foundations, family foundations, community foundations, corporate foundations, corporate giving programs, and nonprofit organizations that make arts grants. GIA offers research and publications online.

Greater Baltimore Cultural Alliance (GBCA)

111 S. Calvert Street, Suite 2220
Baltimore, MD 21202
Tel: (410) 637-4130 | Fax: (410) 468-3383
www.baltimoreculture.org

GBCA exists as a catalyst to create a cohesive cultural community that strengthens the livability and economic vitality of the Greater Baltimore region. GBCA maintains a job bank and publishes an e-calendar, ArtScoop.

Howard County Arts Council (HCAC)

8510 High Ridge Road
Ellicott City, MD 21043
Tel: (410) 313-ARTS (2787) | Fax: (410) 313-2790
www.hocoarts.org

With funding from Howard County Government, businesses and individuals, the HCAC maintains several granting programs, provides resources for arts organizations, and operates the Howard County Center for the Arts. HCAC offers a quarterly calendar, arts and artist directories, quarterly arts roundtables, information about arts opportunities, and information regarding local accessibility services in the arts.

Howard County Library

6600 Cradlerock Way Columbia, MD 21045
Tel: (410) 313-7750
www.hclibrary.org

The Howard County Library provides a number of services and programs for children and adults, and maintains an online calendar of events in Howard County.

Howard County Tourism Council

8267 Main Street, P.O. Box 9
Ellicott City, MD 21041
Tel: (410) 313-1900
www.visithowardcounty.com

Among other services, the Tourism Council maintains on-line and print calendars of events in Howard County.

Leadership Howard County (LHC)
5560 Sterrett Place, Suite 105
Columbia, Maryland 21044
Tel: (410) 730-4474 | Fax: (410) 730-4209
www.leadershiphc.org

Leadership Howard County (LHC) is part of a national movement referred to as “community leadership programs.” LHC strives to select individuals who possess leadership skills; are willing to serve the community by sharing their talents, time and resources; represent the diversity of our community; and can effect change - thus ensuring Howard County’s values and quality of life. The graduates of LHC are currently serving over 240 organizations in the Howard County community.

League of Washington Theatres
P.O. Box 21645
Washington, DC 20009-1645
Tel: (202) 638-4270 | Fax: (202) 638-1220
www.lowt.org

The League was established to create greater public awareness, appreciation, and support for theatre in the Washington area. Current issues of interest include arts advocacy, arts funding, audience development, theatre media coverage, accessibility, current trends in the Washington area, and cultivating a sense of community among its diverse membership.

Maryland Citizens for the Arts
3697 Park Ave., Suite 100
Ellicott City, MD 21043
Tel: (410) 203-1301 | Fax: (410) 203-1317
www.mdarts.org

Maryland Citizens for the Arts is one of the leading voices for the arts community in Maryland, serving the arts through advocacy, education and outreach. MCA works with elected officials and its statewide partners - the Maryland State Arts Council and Arts Education in Maryland Schools Alliance - to shape and support public policy that benefits the arts.

Maryland Council for Dance
300 Washington Ave.
Chestertown, MD 21620
Tel: (410) 778-7237
www.marylanddance.org

The Maryland Council for Dance is a non-profit educational organization working to promote, encourage, and amplify the growth of dance as a major art form in Maryland and surrounding areas. Services include workshops, a master dance calendar, showcases, and awards programs.

Maryland Nonprofits

Silver Spring Office
8720 Georgia Avenue, Suite 303
Silver Spring, MD 20910
Tel: (301) 565-0505 | FAX: (301) 565-060

Baltimore Office
190 W. Ostend Street, Suite 201
Baltimore, MD 21230
Tel: (410) 727-6367 | Fax: (410) 727-1914

www.mdnonprofits.org

Maryland Nonprofits' mission is to strengthen and improve individual nonprofit organizations and the nonprofit sector as a whole, while also working to bolster public confidence in and support for nonprofit organizations. Services include: training and technical assistance; cooperative buying programs; information sharing and networking; public policy advocacy; and research, public education and public relations.

Maryland State Arts Council (MSAC)

175 West Ostend Street, Suite E
Baltimore, Maryland 21230
Tel: (410) 767-6555 | Fax: (410) 333-1062

www.msac.org

The mission of the MSAC is to encourage and invest in the advancement of the arts for the people of Maryland.. The goals of the Council are to support artists and arts organizations in their pursuit of artistic excellence, to ensure the accessibility of the arts to all citizens, and to promote statewide awareness of arts resources and opportunities. To accomplish its mission, MSAC offers a number of granting programs, arts resources, information and publications, and professional development programs.

Maryland State Department of Education**Maryland Essential Learner Outcomes for the Fine Arts**

200 West Baltimore Street
Baltimore, MD 21201
Tel: 410-767-0100

Contact James L. Tucker, Jr., jtucker@msde.state.md.us, for a copy of the complete document.

MENC: The National Association for Music Education

1806 Robert Fulton Drive
Reston, VA 20191
Toll Free: (800) 336-3768
Tel: (703) 860-4000 | Fax: (703) 860-1531

www.menc.org

A 90,000 member association, MENC works as an advocate for music education, conducts research, and provides resource information and publications.

Mid-Atlantic Arts Foundation

201 N. Charles Street
Baltimore, MD 21201
Tel: (410) 539-6656 | Fax: (410) 837-5517
www.charm.net/~midarts/

The Mid-Atlantic Arts Foundation administers a number of different funding and service programs. Foundation programs encourage the creation of new works of art, promote new relationships and ideas within the performing arts community, build new audiences, and advocate for the arts in education.

National Assembly of State Arts Agencies (NASAA)

1029 Vermont Avenue, NW, 2nd Floor
Washington, DC 20005
Tel: (202) 347-6352 | Fax: (202) 737-0526
www.nasaa-arts.org

The National Assembly of State Arts Agencies (NASAA) is the membership organization that represents and serves the nation's state and jurisdictional arts agencies. NASAA conducts research, collects data, and provides resources to arts organizations.

National Endowment for the Arts

1100 Pennsylvania Avenue
NW Washington, DC 20506
Tel: (202) 682-5400
www.nea.gov

The Endowment was created by Congress and established in 1965 as an independent agency of the federal government. It offers grants for arts projects, fellowships and honors, develops public partnerships and international exchanges, conducts research, maintains a library, and produces publications.

Vision Howard County

PO Box 245
Columbia, MD 21045
vision@r-r.com
www.aunitedvision.org

Vision Howard County is an all-volunteer nonprofit civic organization dedicated to improving the quality of life in Howard County. Incorporated in June of 2000, Vision's committees monitor and track issues of importance to county residents and partner with other organizations to address these issues.

Volunteer Center Serving Howard County
10221 Wincopin Circle
Columbia, MD 21044
Tel: (410) 715-3172 | Fax: (410) 715-0845
www.volunteerhoward.org

The mission of the Volunteer Center is to stimulate and expand volunteerism in the community through connecting people to needs of nonprofit and public agencies in order to improve the quality of life for all people in Howard County. The Volunteer Center maintains a database of volunteer opportunities and offers programs for corporations and businesses.

APPENDIX A

ArtsVision 2001 Goals and Objectives

Published by the Howard County Arts Council, April 1992

ADVOCACY

Speak For The Arts In Partnership With Other Regional Cultural Advocates

1. Promote awareness of the value of the arts in the everyday lives of people.
2. Build alliances with local and regional advocacy and arts organizations to speak for the arts.
3. Be an advocate for the arts at the local, state and national levels.
4. Ensure that minority and culturally diverse arts and artists are represented in all aspects of the arts.
5. Recognize the importance of arts in education.

ART-IN-PUBLIC-PLACES

Petition For A Built Environment That Uses The Arts For Surprise And Delight

1. Develop a long-term plan to incorporate art into the public places of our community.
2. Use the Art-In-Public-Places Program as a way to encourage the professional development of Howard County and Maryland regional artists.
3. Involve the public of Howard County in the selection of art for the community.

ARTS ORGANIZATIONS

Strengthen Arts Organizations, Thus Enabling Them To Take Artistic Risks In Serving A Changing Community

1. Encourage organizations to take artistic risks and assist both mature and emerging artists to develop professionally.
2. Encourage organizations to form regional professional relationships.
3. Educate audiences about an organization's art form.
4. Challenge arts organizations to use culturally diverse, minority and disabled artists and to bring arts programs to all areas of Howard County.
5. Raise the profile of arts organizations and enhance their image in the larger community.
6. Strengthen and increase the funding base for arts organizations.
7. Present the arts in appropriate spaces.
8. Strengthen the administrative structure of arts organizations.

ARTISTS

Enable Artists To Work At Their Professions

1. Involve artists as full participants in the decisions being made about the arts.
2. Provide a variety of both work and performance spaces for artists.
3. Develop strategies to reduce the isolation of artists.
4. Increase funding opportunities for individual artists.
5. Develop ways to help stimulate the art market.
6. Ensure that minority and culturally diverse artists are included.

AUDIENCES

Attract More People To Come To The Arts

1. Find ways to increase the quality and diversity of the arts offerings.
2. Increase information about the arts in the community.
3. Recognize the importance of space to audience development.
4. Develop ways in which artists and arts organizations can know their audiences.
5. Educate audiences about the arts and artists to enhance their interest in and appreciation of the arts.
6. Find ways to involve audiences in arts organizations.
7. Attract minority and culturally diverse audiences to arts events.

EDUCATION

Provide Opportunities For Education In The Arts For People Of All Ages

1. Strengthen the arts as a formal curriculum and increase their visibility in the larger community.
2. Develop further and strengthen the existing K–12 arts programs in the Howard County schools.
3. Teach the arts and cultural contributions of diverse cultures as a regular part of the arts curriculum.
4. Recognize the unique opportunity to bring a full range of artistic education programming to pre-school children.
5. Recognize and emphasize life-long learning opportunities in the arts.

FUNDING

Build A Stable, Widespread Funding Base For The Arts

1. Develop a three-year plan, with broad participation, to increase giving and volunteerism in the arts in Howard County.
2. Increase individual giving-levels to the arts from the current level of 20% to the national norm of 30%.
3. Increase corporate funding, especially from small and mid-sized companies.
4. Ensure a stable and increasing government funding base.
5. Assist organizations about foundation funding opportunities.

HOWARD COUNTY ARTS COUNCIL

Strengthen The Mission Of The Howard County Arts Council To Serve The Public Of Howard County By Fostering The Arts, Artists And Arts Organizations

1. Develop the identity of the arts as vital to the life of the community.
2. Adopt the goals and objectives of ArtsVision 2001 and include them in the internal planning for the Council.
3. Develop a process to communicate the goals and objectives of ArtsVision 2001 to community, government and arts organizations.
4. Develop ways to increase the visibility of the Howard County Arts Council in the community.
5. Pursue and embrace cultural and ethnic diversity in all aspects of the Howard County Arts Council's work.
6. Promote volunteerism in the arts.
7. Strengthen the administration of the Arts Council.
8. Provide regular and dynamic information about the arts to the public.
9. Act as the fiscal agent for Howard County funding for the arts and administer the grant process to arts organizations based in the county and in Baltimore.
10. Continue the renovation of the Howard County Center for the Arts as a working and performing art space for individual resident artists and organizations and the public of Howard County.

MULTICULTURALISM

Recognize Multiculturalism In Howard County And Provide Opportunities For Its Artistic Expression

1. Increase participation by minority and culturally diverse people in the arts.
2. Increase the general community's knowledge of and participation in minority and culturally diverse arts.
3. Continue to develop an understanding and awareness of minority and culturally diverse art and culture as part of the K-12 education of Howard County students.
4. Bring a geographical balance to the arts offerings in the county.

PARTICIPATION

Involve The People Of Howard County In Participating In The Arts

1. Ensure that the arts in Howard County represent a diversity of disciplines and activities.
2. Find ways to ensure that "The Arts Are For Everyone."
3. Find ways to identify and adapt existing spaces to be working art spaces.
4. Recognize and develop the relationship between participation, advocacy and audience development.
5. Provide opportunities to participate in the arts as a part of life-long education.

REGION

Forge Productive Relationships Between Arts Institutions In Howard County And Arts, Educational And Civic Institutions In The Baltimore-Washington Corridor, In Order To Strengthen The Arts In The Region

1. Forge productive relationships between arts institutions in Howard County and the arts, educational and civic institutions in the Baltimore/Washington region.
2. Foster and develop arts and cultural organizations that enrich our community and complement the variety of the offerings in the Baltimore/Washington region.

SPACE

Create Appropriate Spaces For The Arts

1. Define the space needs for the arts and community, recognizing the need for a mix of working, performing and visual arts spaces.
2. Develop partnerships among business, government, education and the arts to identify and develop arts spaces.
3. Community access to art spaces must be ensured.
4. Support and preference should be given to the county's existing art spaces.

APPENDIX B

ArtsVision: State of the Arts in Howard County 2003 Participants

INTERVIEWEES

Becky Bafford	Columbia Art Center
David Barrett	Howard County Poetry & Literature Society
Maggie Brown	Columbia Association
Ron Carlson	Community Arts Advocate
Ryland Chapman	Glenelg Country School
Teresa Colvin	Maryland State Arts Council
*Valerie Lash	Howard Community College
*Donni Dingman	Verizon; Columbia Festival of the Arts
Mary Ellen Duncan	Howard Community College
*Carla Dunlap	Maryland State Arts Council
Kathi Ferguson	Howard County Ballet
Steve Gershman	KAWG & F, P.A.
Mike Guiliano	Journalist
John Harding	Patuxent Publishing Company
*Padraic Kennedy	The Horizon Foundation Board; Arts Patron
*Bernice Kish	Slayton House
Rick LaRocca	Musician; Producer
*Barbara Lawson	The Columbia Foundation
Sally Livingston	The Jim Rouse Theatre
Richard G. McCauley	The Horizon Foundation; Arts Patron
Margaret Mauro	The Rouse Company Foundation
*Jan Morrison	Columbia Jewish Congregation
Jean Parker	Merriweather Post Pavilion
David Phillips	Lockheed Martin Foundation
Amy Poff	Howard County Arts Council
James N. Robey	Howard County Executive
Ron Schimel	Miles & Stockbridge; Columbia Festival of the Arts
Holly Thomas	Candlelight Concert Society; Columbia Orchestra
Coleen West	Howard County Arts Council
Kim Wilhelm	Howard County Arts Council
Vera Wilson	Howard County Center of African-American Culture

FOCUS GROUP PARTICIPANTS

African-Americans

David Barrett	Alpha Phi Alpha; Howard County Poetry & Literature Society
Sandy Barrett	Jack and Jill of America, Inc.
Damon Foreman	Jazz Musician
*Doris Ligon	African Art Museum of Maryland
Ron Roberson	Maryland State Arts Council; Howard Community College
Beverly White	Ballet Royale

Educators

Camellia Blackwell	Visual Artist; Educator
*Mo Dutterer	Retired Teacher, Howard County Public Schools
Margaret Gatto	Maryland Youth Symphony Orchestra
Patricia Gordon	Howard County Board of Education
David Holmes	Maryland State Music Teachers Association; Private Teacher
Elaine Newhall	Columbia Orchestra; Private Teacher
Tina Smith	Piano Perspectives School of Music
Street Thoma	Arts Consultant

Ethnic Populations

Yifei Gan	Howard Community College Instructor; Visual Artist
Alfreda Gill	Pakistani-American Arts Council
Marta Goodman	Howard County Public Schools
Daisy McTighe	Baltimore County Public Schools
Sang Oh	Howard County Government
Zenoby Orsten	Columbia Association
Juana Simon	Conexiones
Murray Simon	Conexiones
Chris Tsien	The Horizon Foundation

Older Adults

Judi Bard	Howard County Office on Aging
*Laurence and *Helen Bory	Columbia Community Players; Columbia Pro Cantare
Ann Havill	Elkridge Aging Alliance
Nancy Koepsell	<i>Spotlight on Seniors</i>
Jeanette Lazarofsky	Coalition of Geriatric Services
Denise Love	Vantage House Retirement Community
Rich Madzel	TIO (Try It Out) Theatre
Irene Patton	Actress
Adro Puma	Vantage House Retirement Community
Phyllis Stanley	Fabulous Fifty+ Players; Private Teacher

ARTS MEETINGS ATTENDEES**Dance**

Jennifer Adams	Student
*Eva Anderson	Eva Anderson Dancers
Marilyn Byers	Dance Dimensions and FreeFall
Carolyn Kelemen	Dance Critic; Instructor

Music

*Kathy Bowen	Columbia Pro Cantare
Rae Bernard	Harmony of the Sol
Bonita Bush	Candlelight Concert Society
Maurice Feldman	Columbia Concert Band
Harry Glass	Sundays at Three
Bob Jones	Sundays at Three
Barbara Lett	Howard County Department of Recreation and Parks
Jason Love	Columbia Orchestra
Elaine Newhall	Columbia Orchestra

Theatre and Literary Arts

Anne Barney	Poet; Freelance Writer
*Prudence Barry	Actress; Playwright
*Bill Brown	Director; Designer
*Kasi Campbell	Rep Stage
Katie George	Howard County Library
Susan Thornton Hobby	Writer; Editor
*Toby Orenstein	Toby's Dinner Theatre
Tim Singleton	Howard County Poetry & Literature Society
Bill Stanley	Actor; Playwright

Visual Arts

*Jim Adkins	Artist
Becky Bafford	Columbia Arts Center; Artist
Vinnie Bagwell	Artist
Aline Feldman	Artist
Penny Friedberg	Through the Flower
Nichole Hickey	Columbia Festival of the Arts; Artist
Stan Wenocur	Artist
*David Zuccarini	Artist

* Participants in *ArtsVision 2001* and *ArtsVision: State of the Arts in Howard County 2003*.

Appendix C1

ArtsVision 2001 Assessment Survey

Please answer the following questions within the framework of "In the last 10 years..."

1 – No change 2 – Minimal Progress 3 – Satisfactory Progress

4 – Very Good Progress 5 – Excellent NA – Not Applicable

	For Your Organization						In Howard County					
Speak for the Arts												
Has appreciation and recognition of the arts increased?	1	2	3	4	5	na	1	2	3	4	5	na
Have alliances with local and regional arts organizations increased?	1	2	3	4	5	na	1	2	3	4	5	na
Are there minority and culturally diverse artists and programming?	1	2	3	4	5	na	1	2	3	4	5	na
Has the educational component of programming increased?	1	2	3	4	5	na	1	2	3	4	5	na
Strengthen the Arts												
Are more "artistic risks" being taken with programming?	1	2	3	4	5	na	1	2	3	4	5	na
Are there more interdisciplinary efforts?	1	2	3	4	5	na	1	2	3	4	5	na
Are nontraditional spaces being used for performances and exhibits?	1	2	3	4	5	na	1	2	3	4	5	na
Has board diversity increased? (business, ethnic, arts...)	1	2	3	4	5	na	1	2	3	4	5	na
Is long-range planning guiding the arts?	1	2	3	4	5	na	1	2	3	4	5	na
Are professionals reviewing finances on an annual basis?	1	2	3	4	5	na	1	2	3	4	5	na
Support Artists												
Are minority and culturally diverse artists included as performers or artistic creators?	1	2	3	4	5	na	1	2	3	4	5	na
Are artists serving on boards of directors?	1	2	3	4	5	na	1	2	3	4	5	na
Are artists less isolated?	1	2	3	4	5	na	1	2	3	4	5	na
Are rehearsal, work and performance/exhibit spaces available and affordable?	1	2	3	4	5	na	1	2	3	4	5	na
Has there been more creation and commissioning of new works?	1	2	3	4	5	na	1	2	3	4	5	na
Have disabled artists been included as performers or artistic creators?	1	2	3	4	5	na	1	2	3	4	5	na
Attract Audiences												
Has marketing by arts organizations improved?	1	2	3	4	5	na	1	2	3	4	5	na
Has media coverage of the arts improved?	1	2	3	4	5	na	1	2	3	4	5	na
Are free or low-cost activities provided?	1	2	3	4	5	na	1	2	3	4	5	na
Has programming for families increased?	1	2	3	4	5	na	1	2	3	4	5	na
Is there a geographical balance to arts offerings?	1	2	3	4	5	na	1	2	3	4	5	na

	For Your Organization						In Howard County					
Educate the Public												
Is public arts education funded appropriately?	1	2	3	4	5	na	1	2	3	4	5	na
Have student performances and exhibits increased?	1	2	3	4	5	na	1	2	3	4	5	na
Is the K-12 arts curriculum artistically and culturally diverse?	1	2	3	4	5	na	1	2	3	4	5	na
Are there enough preschool arts programs?	1	2	3	4	5	na	1	2	3	4	5	na
Is the quality of arts instruction consistent throughout the county school system?	1	2	3	4	5	na	1	2	3	4	5	na

	For Your Organization						In Howard County					
Fund the Arts												
Has individual giving increased?	1	2	3	4	5	na	1	2	3	4	5	na
Have small business supporters increased?	1	2	3	4	5	na	1	2	3	4	5	na
Have fund-raising efforts improved?	1	2	3	4	5	na	1	2	3	4	5	na
Does Howard County government adequately support the arts?	1	2	3	4	5	na	1	2	3	4	5	na
Has foundation and corporate funding increased?	1	2	3	4	5	na	1	2	3	4	5	na
Does state government adequately fund the arts?	1	2	3	4	5	na	1	2	3	4	5	na

	For Your Organization						In Howard County					
Involve People												
Are there performance and exhibition opportunities for beginning as well as advanced participants?	1	2	3	4	5	na	1	2	3	4	5	na
Are outstanding artists appropriately recognized?	1	2	3	4	5	na	1	2	3	4	5	na
Does the public know about participation opportunities?	1	2	3	4	5	na	1	2	3	4	5	na
Are arts benefactors appropriately recognized?	1	2	3	4	5	na	1	2	3	4	5	na
Have volunteer opportunities increased?	1	2	3	4	5	na	1	2	3	4	5	na

Notes & Comments

Optional
Name
Title
Organization
Phone #
Email

Please fax completed survey to 410-313-2790 or mail to:
Howard County Arts Council
Attn: ArtsVision 2001 Assessment
8510 High Ridge Rd.
Ellicott City, MD 21043

APPENDIX C2

Howard County Arts Survey

Thank you for taking the time to answer the questions below. These surveys will be used to assess arts activities in Howard County and may be used to plan for future activities.

1. Zip Code of current residence: _____

2. Marital Status: Single Married

3. Age:

- Under 18 18 – 24 25 – 34
 35 – 44 45 – 54 55 – 64
 65 or over

4. What is your last completed grade in school?

- 8th Grade or under Grades 9 – 11
 High School Graduate Some College
 College Graduate Post Graduate

5. Average Household Income:

- \$24,999 or under \$25,000 - \$39,999
 \$40,000 - \$54,999 \$55,000 - \$69,999
 \$70,000 - \$84,999 \$85,000 - \$99,999
 \$100,000 or above

6. Are you an artist or do you participate in arts productions?

- YES NO

7. Have you heard of the Howard County Arts Council (HCAC) and the Howard County Center for the Arts (HCCA) before today?

- YES NO

8. Are you a subscriber, member or donor to an arts organization in: (Check all that apply)

- Howard County Washington DC
 Baltimore City Other: _____

9. If yes, what is your approximate combined annual contribution to the arts?

- Under \$100 \$100 - \$499
 \$500 - \$999 \$1000 or over

10. Have you or your children taken a class in the arts in the last three years?

- YES NO

11. If yes, where were they held?
(Check all that apply)

- K-12 School Art center/school
 College Community site Home

12. On average, how much money per month do the people in your household spend on tickets, fees or admissions to arts events?

(Please circle one)

- \$10 & Under \$11 - \$25 \$26 - \$50
 \$51 - \$75 \$76 - \$100 Over \$100

13. Here are factors that may determine attendance at arts events. Check the 4 most important to you.

- Proximity to home Attractiveness of setting
 Time of event Low ticket prices
 What is presented Civic obligation
 Media reviews/articles Having someone with whom to go
 Featured artists Involvement of friend or family member
 Recommendations of others
 Professional/Personal fulfillment

14. Please check the 2 ways in which you most often find out about arts events.

- Posters/flyers From other people
 Newspapers Through the mail
 Television Radio

15. Who is the intended audience for the majority of the events that you attend?

- Children Family/All ages
 Adult Senior

16. Do you feel the arts in Howard County are meeting the needs of the community?

- YES NO

17. If no, please identify the needs that you feel are not being met and rank them in order of importance.

PLEASE MAIL OR FAX TO:
Howard County Arts Council
8510 High Ridge Road
Ellicott City, MD 21043
FAX: 410-313-2790

Thank you for taking the time to fill out this survey. All information will be kept confidential!

APPENDIX D

Howard County Arts Survey Results 2003

	ARTS ENTHUSIAST	PUBLIC
1. Top Zip Codes		
21044	32%	24%
21045	25%	14%
21042	15%	20%
21043	8%	15%
21046	6%	6%
Various other Zip Codes	14%	21%
2. Marital status		
Single	28%	29%
Married	72%	71%
3. Age		
Under 18	1%	1%
18 - 24	3%	2%
25 - 34	5%	13%
35 - 44	9%	29%
45 - 54	20%	26%
55 - 64	40%	22%
65 or older	23%	7%
4. What is your last completed grade in school?		
8th or under	1%	0%
Grades 9 - 11	1%	1%
High School Grad	3%	7%
Some College	11%	16%
College Grad	22%	38%
Post Grad	61%	38%
5. Average household income		
<\$25k	4%	4%
\$25k - \$39k	7%	8%
\$40k - 54k	10%	13%
\$ 55k - 69k	9%	8%
\$70k - 84k	10%	13%
\$85k - 99	23%	18%
\$100k or more	37%	36%
6. Are you an artist or do you participate in arts production?		
Yes	42%	22%
No	58%	78%

	ARTS ENTHUSIAST	PUBLIC
7. Have you heard of the Howard County Arts Council (HCAC) and the Howard County Center For The Arts (HCCA) before today?		
Yes	90%	82%
No	10%	18%
8. Are you a subscriber, member or donor to an arts organization in? (check all that apply)		
Howard County	47%	16%
Baltimore City	12%	9%
Washington DC	7%	7%
Other	8%	2%
Don't know/no answer	26%	65%
9. If yes, what is your approximate combined annual contribution to the arts?		
Did not answer/Don't contribute	59%	75%
Under \$100	23%	19%
\$100 to \$499	0%	0%
\$500 to \$999	10%	4%
\$1,000 or more	8%	3%
10. Have you or your children taken a class in the arts in the last three years?		
Yes	42%	40%
No	58%	60%
11. If yes, where were they held? (check all that apply)		
K - 12 school	22%	42%
Art Center/School	0%	0%
College	50%	21%
Community Site	18%	32%
Home	11%	5%
12. On average, how much money per month do the people in your household spend on tickets, fees, or admissions to arts events?		
\$10 and under	13%	32%
\$11 to \$25	22%	23%
\$26 to \$50	22%	17%
\$51 to \$75	12%	10%
\$76 to \$100	15%	7%
More than \$100	16%	10%

	ARTS ENTHUSIAST	PUBLIC
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**13. Here are factors that may determine attendance at arts events.
Check the 4 most important to you.**

Proximity to home	50%	47%
Attractiveness of setting	5%	6%
Time of event	42%	50%
Low ticket prices	21%	33%
What is presented	84%	78%
Civic obligation	1%	2%
Media reviews or articles	22%	21%
Having someone with whom to go	13%	17%
Featured artist	55%	45%
Recommendation of others	18%	28%
Professional or personal fulfillment	33%	21%
Involvement of a friend or family member	20%	26%

14. Please check the 2 ways in which you most often find out about arts events.

Posters or flyers	22%	23%
From other people	32%	39%
Newspapers	73%	72%
Through the mail	38%	24%
Television	6%	15%
Radio	10%	12%

15. Who is the intended audience for the majority of the events that you attend?

Children	3%	14%
Family or All ages	24%	37%
Adult	69%	49%
Senior	5%	1%

16. Do you feel the arts in Howard County are meeting the needs of the community?

Yes	71%	68%
No	29%	32%