



California's Arts and Cultural Ecology

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SEPTEMBER 2011

FUNDED BY THE JAMES IRVINE FOUNDATION

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This report is supported by a complete Technical Appendix, and accompanied by a highlights document, *Arts, Culture and Californians*, presenting select research findings. All materials are available via www.irvine.org/ArtsEcology.

Acknowledgments

Markusen Economic Research thanks our data team leader, Anne Gadwa, Principal of Metris Arts Consulting, and Elisa Barbour of University of California Berkeley and William Beyers of University of Washington for their assiduous, smart, and careful work with multiple data sources and thorny problems of variable construction, sample size, and regional disaggregations. Our qualitative team—Maria Rosario Jackson, Deborah Wong, Carolina Sarmiento, Kate Alexander, and Teresa Sanchez—thoroughly and sensitively approached, interviewed and wrote up the experiences of a diverse set of smaller arts and cultural nonprofits spread around the state in all sorts of disciplines. Amy Kitchener and her staff at the Alliance for California Traditional Arts provided critical help in identifying interview candidates. Derik Andreoli, University of Washington, designed our maps, and Michael Leary and Paul Griffiths provided editorial assistance.

Beyond our team, we learned a great deal from the gifts of time and feedback from our Virtual Advisory Committee members Angie Kim of Southern California Grantmakers, Sunil Iyengar of the National Endowment for the Arts, John Kreidler, Cora Mirikitani of the Center for Cultural Innovation, Frances Phillips of the Walter and Elise Haas Fund, and Steven Tepper of the Curb Center at Vanderbilt University. We also appreciate feedback from the members of the California Cultural Data Project Working Group and from Celeste Wald of the California Association of Museums. In deciding upon a metric for sizing arts and cultural non-profits, we enjoyed the active (and again virtual) engagement with researchers Martin Cohen, Randy Cohen, Paul DiMaggio, Mark Hager, Roland Kushner, Frances Ostrower, Thomas Pollak, and Melissa Stone.

For providing information, data and assistance in its use, we thank Cultural Data Project staff members Neville Vakharia, Lauren Hooten, and Christopher Caltagirone, and at the Urban Institute Center on Nonprofits and Philanthropy, Katie Roeger, Thomas Pollak, and Phomika Palmer. Our analysis often required data cleaning exercises that were enabled by their expertise. We are very grateful to the founders and leaders of California nonprofit arts organizations for their time, data, and insights in interviews and follow-up, and to the many California arts leaders and staffers who have provided data to the CDP and the NCCS in recent years. The resulting analyses and interpretations of Markusen Economic Research do not reflect the views of any of these individuals or organizations.

Finally, *California's Arts and Cultural Ecology* benefited greatly from the ready, thoughtful and intelligent feedback from our contact at The James Irvine Foundation, Kevin Rafter, Manager, Research and Evaluation, and his colleagues in the Foundation's arts program group. We appreciate the creative work of Bob Tobin and his Williams Group teammates and Tommy McCall in developing the companion highlights document with its dazzling and communicative graphics.



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Executive Summary

Californians create, organize, and nurture one of the world's richest arts and cultural ecologies. Across diverse landscapes, they preserve traditions and unveil cutting-edge new artwork. As artists, cultural leaders, community-builders, and arts lovers, they build organizations that nurse creativity from conception through production, presentation, and participation.

California's arts and cultural ecology encompasses complex ties among people, organizations, and places. An ecological approach underscores the prominence and contributions of these arts ecology components and how they can be strengthened, especially in times of economic austerity.

California's arts and cultural nonprofits play an initiating and pivotal role in this ecology. They are important shapers of the state's internationally renowned cultural industries. They preserve, commission, and present a cornucopia of music, performance, heritage, and visual arts to people in all of the state's regions, across age groups and ethnicities at all levels of income and wealth.

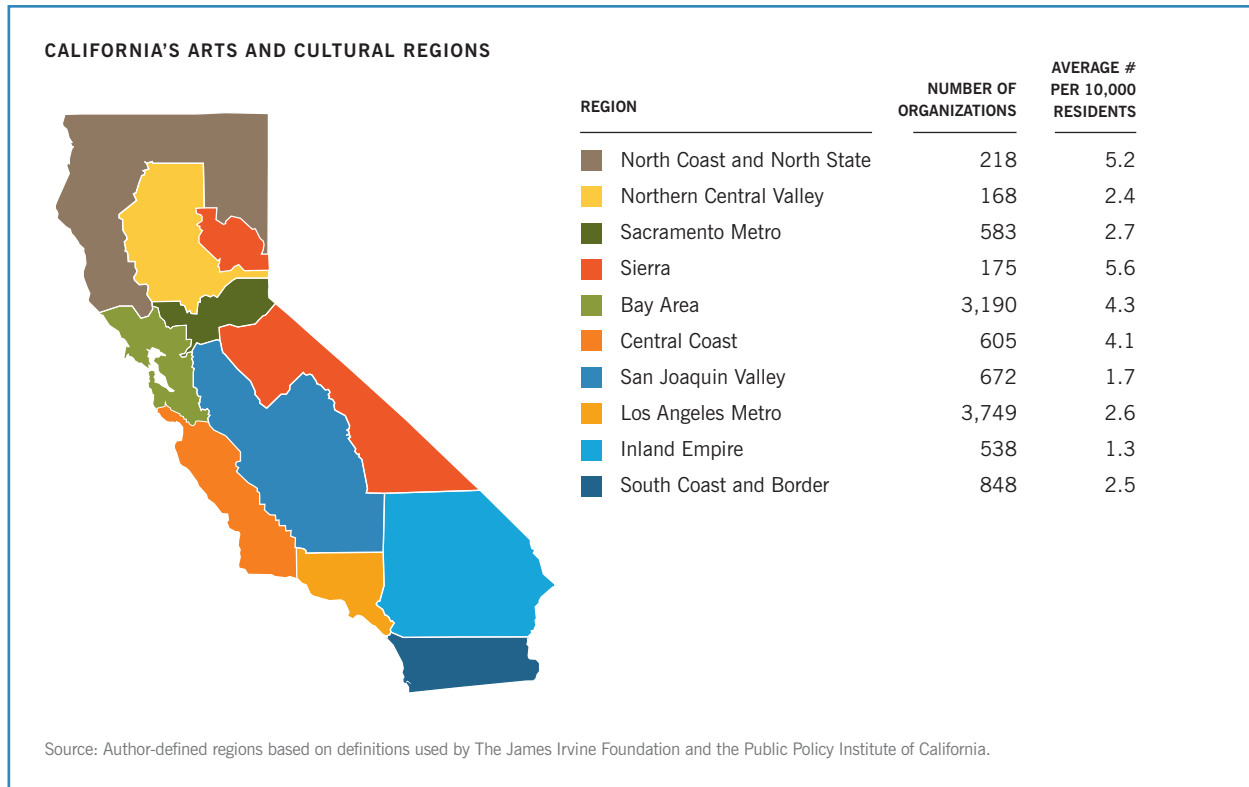
Our study documents the budget size, disciplinary focus, and intrinsic and economic impacts of nearly 11,000 California arts and cultural nonprofits, mapping them onto cities and regions. We use new data from the California Cultural Data Project, The National Center for Charitable Statistics, the American Community Survey, the Survey of Public Participation in the Arts, and Impact Analysis for Planning. To explore causal connections, we correlate elements of this mosaic with community characteristics. We detail how people work for the sector, volunteer, and make financial contributions. We show the overall impact of people and organizations on California's economy in terms of jobs, income, output, and state and local tax revenue. With interview data, we offer qualitative insights into governance, inter-organizational relationships, and special challenges for small nonprofits.

California's nonprofit arts and cultural organizations

California hosts more nonprofit arts and cultural organizations than do most of the world's nations. Their ranks include multipurpose cultural centers, science and visual arts museums, symphony orchestras and folk ensembles, artist service organizations, ethnic arts groups, literary societies, dance companies, professional associations, and many more. Some have no formal budgets, do little fundraising, and operate chiefly on energetic contributions of volunteers. Others manage sizable budgets with extensive staff, run large productions and venues, and rely less on volunteers.

California's nearly 11,000 arts and cultural nonprofits operate across the state's regions. Smaller organizations vastly outnumber large ones, with 85% of organizational budgets falling under \$250,000 and 48% under \$25,000. Yet California's nonprofits have a much larger footprint than formal budgets convey, because at all budget sizes, they engage the services of substantial numbers of volunteers and receive in-kind contributions of time and materials uncommon in public and for-profit sectors.

Reflecting California's ethnic diversity and its immigrant character, 22% of California's arts and cultural nonprofits focus on ethnic, folk arts, and multidisciplinary work. Another fifth focus on humanities, legacy, and other museums. Visual arts organizations, including art museums, comprise 5% of California nonprofits, but 10% of those with budgets over \$10 million.



Arts and cultural participants

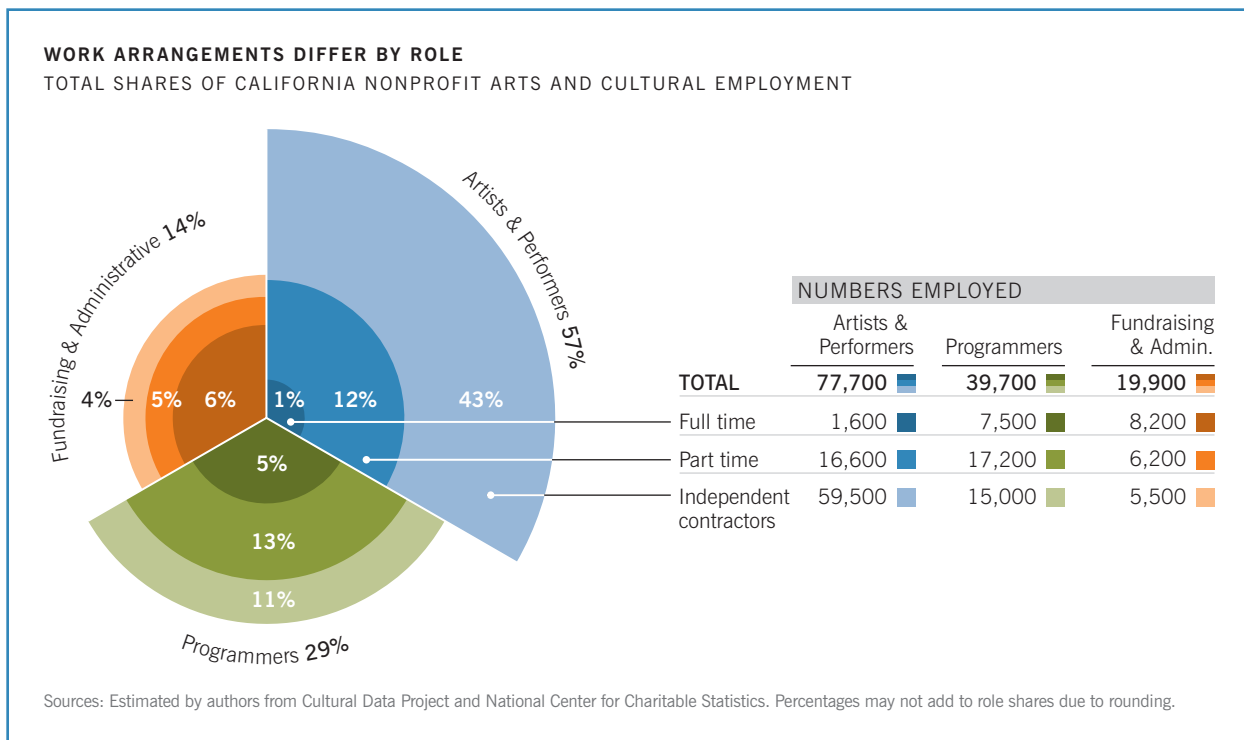
Californians are more often fans of arts and culture than their counterparts elsewhere. In 2008, excluding festivals to permit comparison over time, 52% of Californians over the age of 18 attended at least one arts event compared to 46% in other states. Salsa dance, jazz concerts, plays, and art galleries and museums are particular favorites. The state's nonprofit arts and cultural organizations logged an estimated 137 million attendees, both California residents and visitors. Participation among California adults fell 6 percentage points from 2002 to 2008, less rapidly than elsewhere in the United States.

Demographic factors influence arts and cultural participation among California adults. Women are more likely to attend events than men, and older adults under age 65 are more likely to attend than younger ones. However, after controlling for age, family income, race/ethnicity, sex, education level,

and metropolitan location, the odds of a California adult attending at least one event were still 25% higher than nationally. Both nationally and within California, broader definitions of participation that include activities such as dancing, playing musical instruments, and photography, would likely generate considerably higher participation rates.

Arts and cultural workers, volunteers, and contributors

The California nonprofit arts and cultural workforce is large, diverse, and spread among cities and regions. More than 709,000 people work in the sector as employees, contractors, and volunteers, many of them part-time. Those working for pay earn more than \$1.9 billion annually. Well over two million people make financial contributions.



California's arts and cultural nonprofits engage over 137,000 people as employees and contractors, many part-time. They pay nearly 77,000 artists for work each year, representing 57% of all paid arts workers. Because only 2% work full time and another 21% part-time, artists account for just 27% of paid hours. In contrast, 19% of programming staff and 41% of administrators and fundraisers work full time. The managerial challenge is considerable—the majority of people staffing arts nonprofit operations work less than full time and on contract. Workers on full-time payroll (13%) log 46% of hours worked, while the 58% working on contract account for 23% of hours logged.

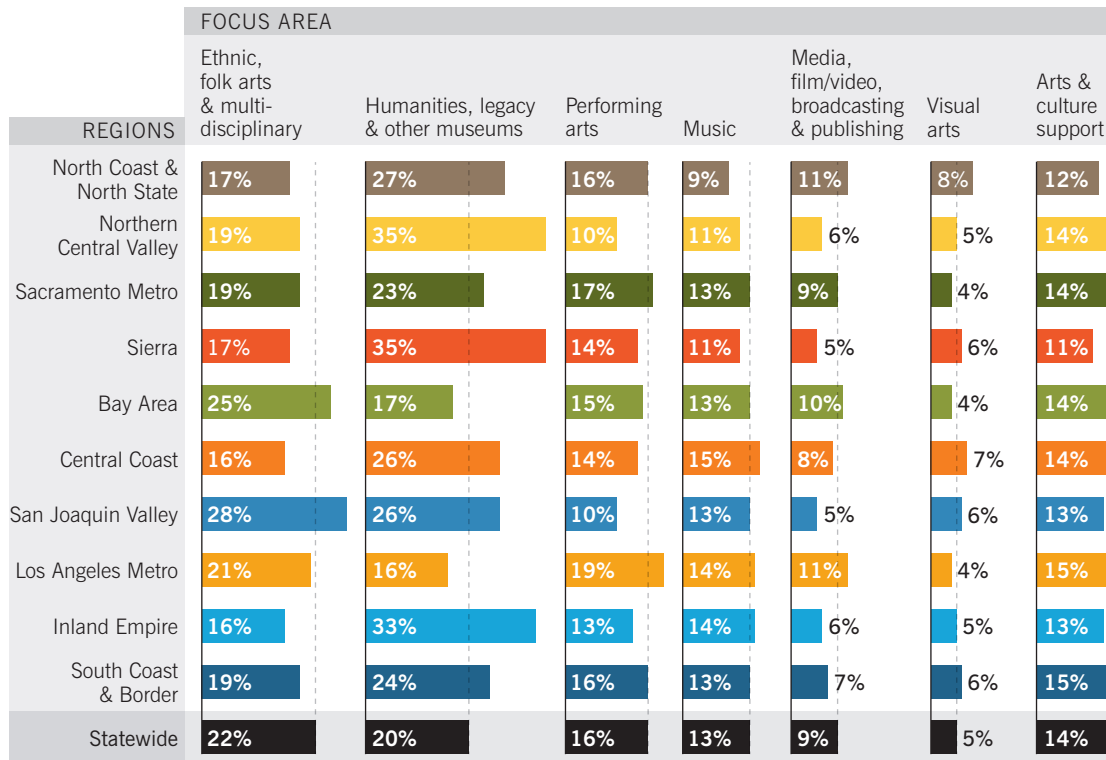
For every compensated worker in the sector, four times as many people—a total of 572,000—give of their time, energies, and skills as volunteers, interns, and apprentices. An estimated 2.2 million people contribute to California arts and cultural nonprofits annually, and 61,000 board members contribute both time and money.

How California regions and cities host arts and culture

California regions vary dramatically in size and density of population. Larger arts and cultural nonprofits thrive more easily in large, densely populated metros, reflecting both economies of scale in reaching audiences and high concentrations of artists and designers. The Los Angeles region supports relatively more very large organizations than all other regions, and its nonprofits generate 46% of all the direct expenditures made by California's arts and cultural nonprofits. However, the San Francisco Bay Area hosts the largest concentration of nonprofit arts-related employment and higher numbers of organizations per capita than other populous regions. Bay Area residents patronize nonprofit arts and cultural organizations at higher rates than elsewhere in the state. However, the Sierra region and the North Coast and North State region support the highest numbers of organizations per capita.

Larger than average shares of San Joaquin Valley and Bay Area organizations focus on ethnic, folk, and multidisciplinary arts, while the opposite is true for the

CHARTING EXPRESSION ACROSS CALIFORNIA
 FOCUS AREAS OF ARTS AND CULTURAL NONPROFITS BY REGION



Sources: National Center for Charitable Statistics; Cultural Data Project.

Central Coast and Inland Empire. The performing arts account for larger shares in the Los Angeles and Sacramento metros. More Central Coast organizations focus on music, while the North Coast and North State region specializes more in humanities, legacy, media, and visual arts.

In a causal investigation of variations in organizational presence, size, and focus across places, we found that place-based characteristics matter greatly—that the conjunction of people with place explains much of the longer-term evolution of local arts and cultural ecologies across California. Arts and cultural organizations depend on collective, not just individual, actions and commitments for their continued existence.

Certain features of cities help explain numbers of arts and cultural organizations per capita, including the Bay Area's high incidence. The features mostly

closely and positively associated with higher per capita arts and cultural organizational presence are the city's role as an employment center, levels of private philanthropic funding for arts and culture, levels of educational attainment among adults, and personal wealth of city residents.

Intrinsic and economic impacts

California's arts and cultural nonprofits do not primarily aspire to generate economic impacts, but to create beautiful and meaningful arts and cultural experiences and make them available to the general public. They succeed quite remarkably. Each year, they collectively offer an estimated 277,000 performances, almost one in four away from the organization's home base. They commission an estimated 41,000 theater, dance, musical compositions,

and artworks annually. On average, these nearly 11,000 organizations are open to the public 18 hours a week for programs and performances. Surprisingly, they offer more educational programs and workshops than productions and exhibits. People pay no fee for participation 62% of the time. These offerings are complemented by activities organized by informal arts and cultural organizations not included in the data.

California's arts and cultural nonprofits also have sizable economic impacts on their communities and the state as a whole. Through their purchases of equipment, materials and services, rental and mortgage payments, and spending by their employees and contractors, they generate a total of \$8.6 billion in sales, \$3.6 billion in labor income and a total of 71,000 FTE jobs, generating average full-time earnings of \$50,000 per FTE. By sector, indirect and induced jobs are spread widely. Financial and business services, wholesale and retail trade, accommodation and food services, and health care account for the largest shares.

Special challenges for small organizations

Smaller arts and cultural organizations often structure their organizations and solve their problems differently than do larger ones. They rely much more heavily on volunteers and less on paid staff. The volunteer-to-paid staff ratio for organizations with budgets between \$25,000 and \$250,000 is seven to one, compared with one volunteer for every five paid staff for the largest organizations.

Our interviews suggest that small organizations are organizationally more diverse than larger ones. Some begin and remain informal, while others are structured as collectives or nonprofits. Some have formal membership structures and tailor their governance processes to unique constituencies and missions.

Small arts and cultural nonprofit organizations are more likely to lack dedicated space to create, present, and organize their work than are larger ones. For this and other scarce resource reasons, small organizations are more likely to seek and rely on inter-organizational relationships, often informal, including with non-art organizations.

Smaller arts and cultural nonprofit organizations are more likely to be embedded in geographic and/or affinity (ethnic, immigrant, age, sexual preference, specialized art form) communities than are large organizations. Some play important roles in stabilizing their immediate neighborhoods: improving safety, aesthetics, and infrastructure; and providing a sense of community for people more generally. Some small organizations, especially those serving immigrant groups, maintain strong cultural connections with communities in countries of origin.

Arts and cultural organizations embedded in very poor communities struggle with finances and space; their constituents cannot afford to contribute and/or pay much for services. Leaders of these organizations are often asked to solve problems outside their arts and cultural expertise: neighborhood violence, immigration issues, and community health challenges. Such demands, though often met, place an extra burden on their operations.

Conclusion

In California's arts and cultural ecology, nonprofit arts organizations play a key role. They form a huge seedbed for new arts and cultural forms and are also major caretakers for cultural heritage and fine art. They provide food for thought, underscore meanings and interpretations of past and present, and deliver delight and beauty. They are often the originators of ideas and forms that result in creative industry products and services that generate many more jobs and incomes than those generated directly by their operations.

This study breaks new ground in measuring the extent of arts and cultural activity in California and revealing the interconnections between organizations, people, and places. New data from the California Cultural Data Project and the American Community Survey have enabled us to document size and focus, as well as location, participation, and economic impacts in ways that were not possible even two years ago.

These findings will help arts and cultural leaders, advocates, and participants understand and appreciate the extraordinary collective reach of the sector and its interconnections with people's lives and the communities in which its many venues are embedded. We hope that this ecological and more fully fleshed-out depiction of the state's arts and cultural nonprofits will generate greater participation in and respect for their many gifts to California.

SECTION ONE

Conceptualizing California's Arts and Cultural Ecology

Californians create, organize, and nurture one of the world's richest arts and cultural ecologies. Across diverse landscapes, they engage in distinctive cultural traditions and art forms, and explore new ones. They alter cultural and expressive practices in response to contemporary social and community challenges. As artists, cultural leaders, community builders, and arts lovers, they build organizations that nurse creativity from conception through production, presentation, and participation. Californians participate in the state's nonprofit arts and cultural offerings at higher rates than do Americans as a whole.

An arts and cultural ecology encompasses the many networks of arts and cultural creators, producers, presenters, sponsors, participants, and supporting casts embedded in diverse communities. Forty years ago, scientists and policymakers realized that treating plants, animals, minerals, climate, and the universe as endlessly classifiable, separate phenomena did not help people understand or respond to environmental problems. So they created the integrated field of environmental ecology. In similar fashion, arts producers, advocates, and policymakers are now beginning to strengthen the arts and cultural sphere by cultivating a view of its wholeness and interconnectedness. Following the pioneering work of John Kreidler and Moy Eng in their study, *Cultural Dynamics Map*, and William Beyers and colleagues' two studies of the music industry in Seattle, we define the arts and cultural ecology as the complex interdependencies that shape the demand for and production of arts and cultural offerings.¹

Why does an ecological approach matter? A wide variety of factors—separation by distance, arts disciplines and missions, size of organizations, and organizational form—make it difficult for creators,

advocates, policymakers, and the public to appreciate the prominence and contributions of the sector.

Californians know very little about the state's arts and cultural ecology as a whole or about the sector's intrinsic and economic benefits and why these are central to California's quality of life. In this study, we begin to document the breadth and depth of California's arts and cultural ecology, including interdependencies among commercial, nonprofit, public, and informal organizations. However, just as modern environmental science began by exploring ecological subsystems, our work focuses on the understudied nonprofit arts and cultural sector and its intersections with people and place.

California's arts and cultural ecology consists of relationships among organizations, people, and places (Figure 1).² Organizations nurture artistic expression and produce, present, support, and preserve arts and cultural content. People—cultural workers, managers, participants, and contributors—bring talent, energy, and resources to the cultural ecology and make important decisions that affect its evolution. Places—neighborhoods, towns, cities, regions, and states—are the sites for arts and cultural creation, innovation, production, presentation, and participation. Place-based political and civic leaders craft and implement the policies that nurture arts and cultural organizations even though the results may serve people and organizations farther afield.

Arts and cultural nonprofits: an arts ecology subsystem

Because they play an initiating and central role, we use nonprofit arts and cultural organizations as the major point of entry in this study. California's arts nonprofits

FIGURE 1. CALIFORNIA'S ARTS AND CULTURAL ECOLOGY

Source: Adapted from Ann Markusen and Anne Gadwa, *Creative Placemaking*, Washington, DC: Mayors' Institute on City Design and the National Endowment for the Arts, October, 2010.

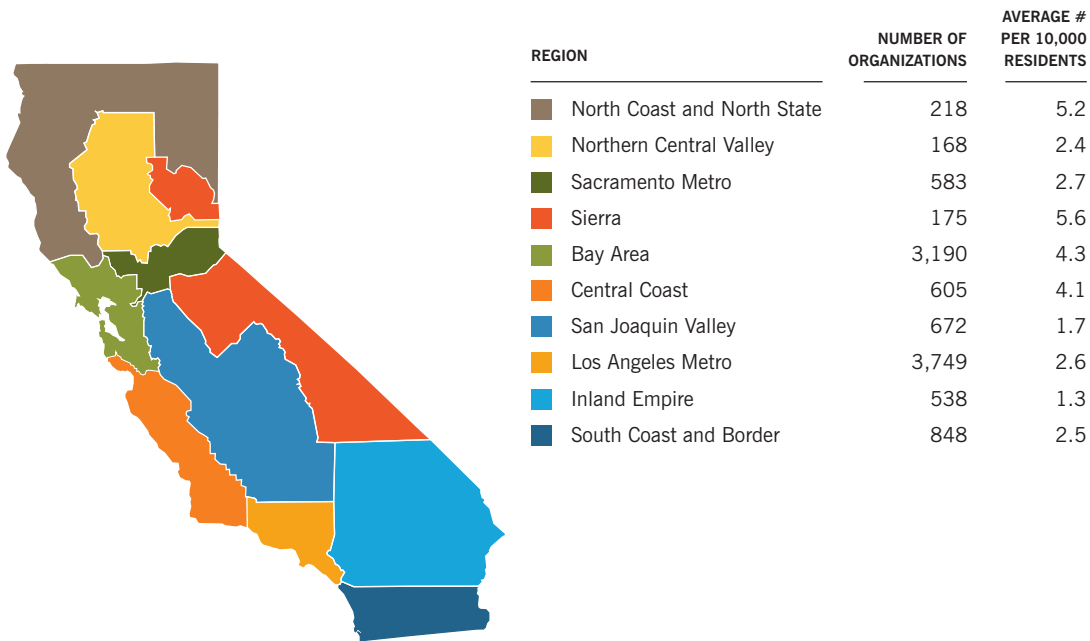
nurture artistic talent, support innovation, present new and time-honored works, archive fine art and cultural materials, and preserve and share diverse cultural practices. Their role is acknowledged and supported by tax policies that affirm their contribution to the public good.³ We show how the arts and cultural nonprofits engage people as participants, workers, volunteers, and contributors; how they map onto regions and how distinctive characteristics of places shape nonprofit offerings.

Thanks to innovative public and nonprofit surveys, we can now explore the diversity and impact of California's nonprofit arts and cultural ecology. We use recent data from the National Center for Charitable Statistics (NCCS), the California Cultural Data Project (CDP), and Impact Analysis for Planning (IMPLAN). To explore participation more fully, we combine insights from the CDP with the National Endowment for the Arts' Survey of Public Participation in the Arts (SPPA). To place the nonprofit sector in context alongside for-profit and public sector arts and cultural organizations, we

use data on California artists' employment from the decennial Census and the American Community Survey (ACS). To understand the relationship of arts and cultural organizations to the places in which they reside, we assemble characteristics of cities and their residents derived from the ACS, the California Department of Finance, the California State Controller's Office, and the Foundation Center. For regional units, we use those portrayed in Figure 2 and where data permit, we also employ metropolitan and city disaggregations.

Existing data sources on nonprofit organizations are valuable for fleshing out an arts and cultural ecology, but they present challenges for the researcher. Both the NCCS and CDP cover smaller arts organizations, but their coverage is not perfect. The NCCS, more comprehensive because the IRS requires nonprofits to submit data, potentially overestimates their numbers because it does not adequately track merged, renamed, or failed organizations. We address potential overcounting of small organizations in the NCCS with conservative adjustments based on sample-

FIGURE 2. CALIFORNIA'S ARTS AND CULTURAL REGIONS



Source: Author-defined regions based on definitions used by The James Irvine Foundation and the Public Policy Institute of California.

based research by others. The CDP best captures organizations that receive grant funding and misses out on many very small organizations who often do not or cannot seek grants, a group that makes up 48% of California NCCS arts and cultural nonprofit organizations. It overrepresents performing arts and music organizations and captures only 6% of the NCCS's ethnic, folk arts, and multidisciplinary organizations. However, the CDP offers many more data points on facets such as arts and cultural organizational offerings, attendance, expenditures, contributors, employment, and volunteer involvement. In exploring this singular and pathbreaking CDP evidence, we use NCCS weights to adjust size, regional, and focus distributions so that the results are more comprehensive. The Technical Appendix details the advantages of these data sources, the challenges, and our methods of dealing with them.

We supplement these data with insights from three dozen interviews conducted with smaller arts organizations throughout the state that were not in the CDP as of July 2010 and that predominantly focus on the ethnic, folk arts, multidisciplinary activities, heritage, and humanities (see the appendix for methodology). Though exploratory, these interviews reveal important insights into variations in structure and governance, how organizations morph over time, how they work across sectors and interrelate with other arts and cultural organizations, how they use dedicated space, how they are embedded in local and other types of communities, and how they generate intrinsic as well as economic impacts. They help us anticipate what a fuller depiction of the state's arts and cultural ecology might look like with further research. Throughout, we draw from these interviews to illustrate dimensions of California's arts and cultural diversity. In the penultimate section, we summarize what they reveal about ecological interrelationships.

Placing nonprofit arts and culture in the larger California ecology

Before homing in on nonprofits, it is worth inquiring into the relative size of the subsector vis-à-vis other arts and cultural organizations. Especially because the state hosts a large, robust contingent of American for-profit cultural firms, nonprofits are likely to account for a smaller share of overall activity in the sector than in the nation. However, since interdependencies between California's for-profit and nonprofit sectors are well documented (Markusen, Gilmore, et al., 2006), it cannot be inferred that they are less important.

Artists' employment data from the ACS offer a lens for making these comparisons. In 2007–09, an estimated 159,000 Californians reported making their living as arts and design workers, comprising 1% of the state's employed workers and considerably higher than the national employment share of 0.7% (Table 1).⁴ Within the state, artists are overrepresented among the Los Angeles and Bay Area employed but underrepresented in small metros like Visalia-Porterville, Madera, and Hanford-Corcoran.

TABLE 1. CALIFORNIA ARTS AND DESIGN WORKERS BY REGION, 2007–2009

	ARTS AND DESIGN WORKERS	ARTS AND DESIGN WORKERS % OF TOTAL
Los Angeles Area	87,684	1.1
Bay Area	38,257	1.1
South Coast and Border	13,429	0.9
Selected Rest of State*	7,268	0.9
Sacramento Metro	5,711	0.6
San Joaquin Valley	4,698	0.3
California: Total State	159,160	1.0
USA	976,550	0.7

Source: 2007–09 American Community Survey. *Includes Mendocino, Monterey, Nevada, San Luis Obispo, Santa Barbara, Santa Cruz, Shasta, Siskiyou, and Sutter counties.

Fewer California artists are employed in nonprofit arts and culture than in the U.S., a reflection of higher concentrations of their employment in the private sector. Only 7% of California's artists report working for wages or salaries for nonprofit employers as their primary employment status, a share much lower than the national rate of 13% (Table 2). Public sector wage and salaried employment also is much lower for California artists than nationally. Higher shares of California artists work for private sector employers than nationally—48% versus 42%. Artists' private sector employment is even more prominent in the Los Angeles (54%) and San Jose (52%) Metro areas, where cultural industry employers are concentrated.⁵ Enterprises in the for-profit motion picture and video industries in particular account for much higher shares of California creative talent than in the nation (Markusen, Gilmore, et al., 2006, Table A3). California's nonprofit and informal arts and cultural organizations reflect this expertise, with greater emphasis on music, acting, filmmaking, and related design genres than elsewhere in the nation.

However, large shares of California's artists (43%) report being self-employed (Table 2). Many are working on contract with private, nonprofit, and public sector employers, while others are working in the unincorporated sector in ways we cannot chart. As we found using CDP data, some 78,000 artists receive pay for their work from California nonprofits, and 51% of their paid hours are on contract. Overall, since artists are 67% more prominent in the California workforce than nationally, their employment in nonprofit and public sectors is not likely to lag behind the nation's on a per capita basis.

The for-profit and nonprofit arts sectors in California are deeply interdependent. Both generate training, jobs, experience, and innovative content for the ecology as a whole. Many artists work in both sectors simultaneously. A recent Irvine-sponsored study found that while artists earn higher shares of their income on average in the commercial sector, they devote more hours on average to the nonprofit sector. Artists rank

the nonprofit sector highest for aesthetic satisfaction. They also report better opportunities for exploring new media and collaborating across disciplines in the nonprofit sector.

Though our study presents only a partial view of the entire ecology, it is the first to address California's nonprofit arts and cultural sector comprehensively. In what follows, we first explore the numbers, size, and focus of nonprofit organizations. We then examine their intersections with people and with regions and cities. In a final section, we summarize their influence in terms of arts delivery and economic impact. Wherever possible, we explore the "why" of what we describe, correlating ecological differences with causal factors.

TABLE 2. ARTISTS BY EMPLOYMENT STATUS, CALIFORNIA, UNITED STATES, 2000

EMPLOYMENT STATUS	CALIFORNIA (%)	UNITED STATES (%)
Wage and salary, private employer	47.5	42.2
Self-employed, unincorporated	35.3	33.2
Self-employed, incorporated	7.4	6.6
Wage and salary, nonprofit	7.1	13.3
Wage and salary, public	2.4	4.3

Source: Calculations by author Ann Markusen, Greg Schrock, Sara Thompson, and Anne Gadwa for Markusen Economic Research Services, based on Population Census PUMS data (2000, 5% file) from Integrated Public Use Microdata Series, Minnesota Population Center, University of Minnesota.

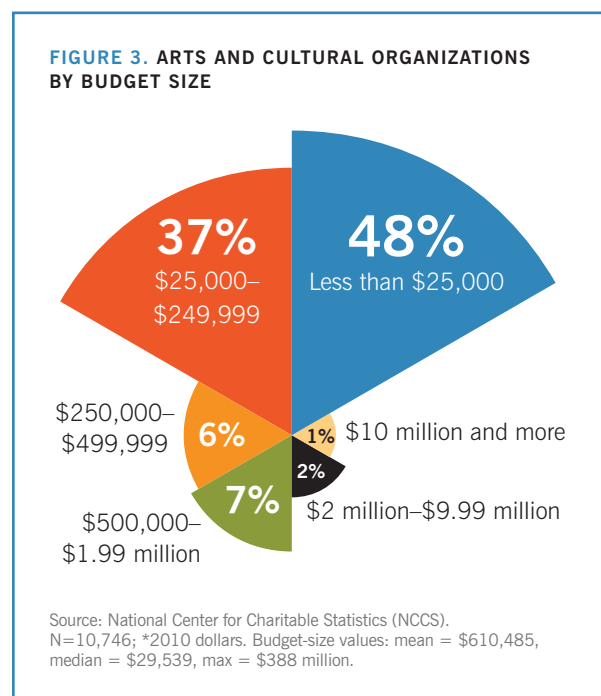
SECTION TWO

Nonprofit Arts and Cultural Organizations

California hosts more nonprofit arts and cultural organizations than do most countries in the world. It is home to nearly 11,000, found in every region in the state and in all types of communities.⁶ Their ranks include multipurpose cultural centers, science and visual arts museums, symphony orchestras and folk ensembles, artist service organizations, ethnic arts groups, literary societies, dance companies, professional associations, and many more. In this section, we explore size, artistic and mission focus, and variations in governance arrangements.

Budget-size distribution

California's nonprofit arts and cultural sector nurtures an extraordinary range of organizations that vary greatly by budget size. Among the estimated 10,746 of them, small organizations vastly outnumber large ones, with 85% of organizational budgets falling under \$250,000 and 48% falling under \$25,000 (Figure 3).⁷



California's nonprofit arts organizations have a much larger footprint than monetary revenues and expenditures convey, because they engage volunteers and receive in-kind contributions that are not common in public and for-profit sectors. Smaller organizations, in particular, rely more heavily on volunteers and contributed space and materials. Indeed, from CDP data, we estimate that volunteer-to-paid staff average seven to one for organizations between \$25,000 and \$250,000, and two to one for organizations larger than these.⁸ This suggests that smaller organizations may be more embedded in their communities where the distinction between creator and participant is fuzzier. It may also reflect the inability of these organizations to access public and private funding at levels that would enable them to pay for staff.

Longevity, size, and growth are not synonymous with success. Our interviews identified multiple cases of organizational reshaping, where a start-up subsequently changed its name or merged with other organizations in a move toward viability. For instance, the Gay Men's Chorus of San Jose, originally formed in 1983 as the Liederman Gay Men's Chorus of San Jose, reincorporated in 1994 as Rainbow Pride Performing Arts of San Jose, reincorporated again as the Silicon Valley Gay Men's Chorus in 2005 and achieved 501(c)(3) nonprofit tax exempt status in 2007. In another instance, the 15-year-old Rumi Society was renamed the Persian American Cultural Center in 2000 upon joining forces with other Persian cultural workers in California.

Small budgets and few paid staff do not mean low impact. Sacramento-based Capital Film Arts Alliance, for instance, accomplishes quite a bit on a very small budget (see next inset). Modest size and fluidity (high turnover rates, reorganizations, and mergers), especially among smaller arts and cultural organizations in poorer communities, may reflect adaptability and innovation rather than dysfunction, a possibility that can be explored in future research.

SMALL BUDGET, BIG REACH: CAPITAL FILM ARTS ALLIANCE

Sacramento-based Capital Film Arts Alliance provides networking support for local actors, filmmakers, and writers of all ages and skill levels. Through monthly meetings, workshops, and script readings, the Alliance has built a dynamic and talented film community, reaching thousands of people while spending less than \$5,000 a year, raised from modest annual dues from its 275 members.

Capital Film Arts has a volunteer executive director and an eight-member board elected by its paying members. The Art Institute of California—Sacramento donates free space for its meetings, and volunteers donate in-kind time and materials worth \$20,000 a year.

The Alliance, whose participants span the greater Sacramento and San Francisco Bay regions, collaborates with the Sacramento Film and Music Festival, the Arts and Business Council of Sacramento, the California Arts Council, the Social Media Advertising Consortium, and the mayor's For Arts Sake initiative to magnify its impact.

—Teresa Sanchez

Some smaller organizations interviewed articulate long-term strategies that do not involve growth, stating that their current size is optimal for their mission and work style. The three principals of Taller Tupac Amaru, a seven-year-old Chicano art-making collective in Oakland that serves local clients as well as a large online constituency, plan to continue their work at current levels of productivity so that they can maintain complete ownership of the process. Many smaller organizations interviewed do hope to expand programming, pay their creators more, and reach new audiences. Some have ambitious expansion plans that may involve changing focus, constituency, and location as well as name.

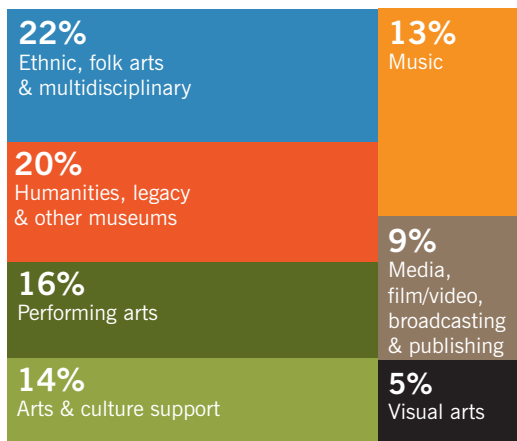
Artistic disciplines and missions

Many California arts and cultural nonprofits specialize in disciplines such as visual or performing arts, music, or media, broadcasting, and publishing. Others focus on humanities or historic preservation and presentation. Still others concentrate on ethnic or folk arts. Some define themselves by their mission to support arts and culture more generally. Some

organizations have multiple foci or work across disciplines. Here we examine the distribution of California nonprofits by organizational focus, looking also at whether larger organizations specialize differently than smaller ones. In a later section, we explore how organizational focus varies by region.

High percentages (22%) of California's nonprofit arts and cultural organizations belong to the ethnic, folk arts, and multidisciplinary group (Figure 4). Another 20% belong to the humanities, legacy, and other museums group. These two groups encompass relatively more organizations with annual budgets under \$25,000. Visual arts organizations, including visual arts museums, comprise only 5% of all organizations.

Overall, focus distributions do not vary greatly across organizations by budget size. California arts and cultural organizations with budgets over \$10 million are more likely to specialize in visual arts; arts and cultural support; and media, film/video, broadcasting,

FIGURE 4. ARTS AND CULTURAL ORGANIZATIONS BY FOCUS AREA

Source: National Center for Charitable Statistics (NCCS). N=10,746.

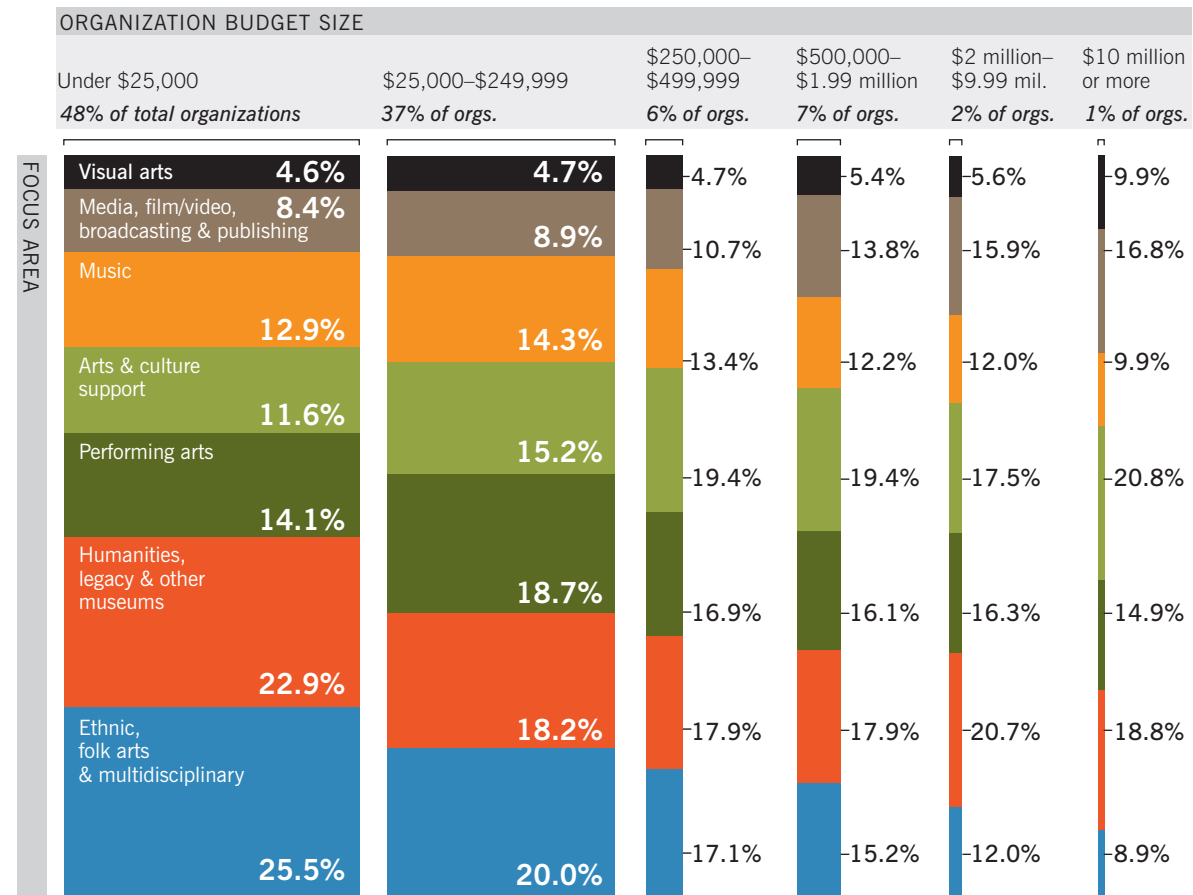
and publishing than smaller organizations (Figure 5).⁹ With the exception of arts and cultural support, organizations with budgets between \$1 million and \$10 million are similarly specialized. Organizations with budgets between \$25,000 and \$250,000 are much more likely to work in ethnic, folk arts, and multidisciplinary fields, as are those under \$25,000, who also are more focused on humanities, legacy and other museums. Performing arts and music organizations are more evenly spread across all size groups than any other focus category.

Interviews with smaller arts and cultural organizations serving racial or ethnic communities or distinctive neighborhoods reveal why they have often chosen a multidisciplinary focus. Santa Ana's Vietnamese American Arts & Letters Association and Selma's Los Paisanos foster all forms of cultural expression—language, music, dance, and visual arts—because certain art forms, such as music and dance, or writing and drama, are deeply interrelated.

Some smaller self-identified arts and cultural organizations in our interviewee pool operate simultaneously in nonprofit health care, social services, educational, and religious spheres. REACH LA (see inset next page), a media arts organization, accesses health-care dollars to support its programs. San Bernardino's Asian American Resource Center nurtures cultural traditions while running social service programs in community traffic-safety awareness, licensed family child care, after-school homework, community service, electricity and gas bill discounts, and lead poisoning prevention.

Organizations emerging from a specific ethnicity have sometimes diversified into multiethnic organizations. San Bernardino's Asian American Resource Center, founded in 1995 by a Cambodian refugee, now celebrates multicultural traditions for a widely dispersed immigrant constituency that includes Hispanics, the area's largest ethnic minority. WorldBeat Center, operating out of a resuscitated water tower in Balboa Park, originally served the African and African American communities in San Diego, but now serves other ethnic groups without a cultural center and has opened a sister center in Ensenada, Mexico.

FIGURE 5. BUDGET SIZE OF ARTS AND CULTURAL ORGANIZATION BY FOCUS AREAS



Sources: National Center for Charitable Statistics; Cultural Data Project. 2010 dollars.

HARNESSING ARTS AND CULTURE FOR YOUTH HEALTH: REACH LA

REACH LA, a nonprofit youth organization in downtown Los Angeles, educates at-risk youth about reproductive health and HIV prevention through the media arts. Using and teaching photography, Web design, video production, fashion design, and acting, it trains young people for entry-level positions in the arts and helps them develop professional portfolios.

The agency operates from a hidden location on the roof of a building in the downtown produce district, specifically chosen for its gang-neutral territory and “underground” setting. Its quarters include a classroom, lounge, silkscreening room, HIV testing space, and offices. The organization also sponsors an annual Ovahnness Ball that takes place at different venues across greater Los Angeles.

Although REACH LA considers itself an arts organization, the lion’s share of its 2011 budget (\$450,000) is funded by a grant from the Centers for Disease Control. Besides its full-time staff of three people plus a development consultant, REACH relies heavily on volunteers, including six board members who write grants, organize particular minority communities, and strategize on business decisions. Youth volunteers, once educated by REACH, re-enter their community and share their knowledge with their peers.

—Teresa Sanchez and Amy Kitchener

SECTION THREE

Participants

Millions of people—Californians and visitors alike—participate in, create for, work in, and support California's nonprofit arts and cultural organizations, many of them frequently. Californians participate in the arts at higher rates than Americans as a whole, and though these rates fell from 2002 to 2008, they dropped more slowly than they did nationally. Demographic factors do influence arts participation among California adults, but even after controlling for differences in age, family income, race/ethnicity, sex, education level, and metropolitan status, the odds of a California adult attending at least one event were 25% higher than for other American adults. Regionally, participation rates are markedly higher in the Bay Area than the rest of the state, a result of both supply and demand.

In this section, we use both CDP data on attendance reported by organizations in California and SPPA data reported by California individuals on their participation. It is important to keep in mind that the attendance definitions in the CDP are somewhat wider than the participation definitions used in the SPPA. For instance, only visual arts museums and galleries and historical parks and monuments are included in the SPPA, while the CDP includes other types of museums. Though the “benchmark” events for which the National Endowment for the Arts has consistently tracked participation over the years have been somewhat limited in type, the NEA has expanded these in recent surveys. For example, in the 2008 survey, the NEA included attendance at performing arts festivals and Latin/Spanish/salsa concerts. On the other hand, the SPPA is a true random sample of the population, while the CDP is not and does not include many smaller organizations. The SPPA includes participation in for-profit, informal, and publicly organized arts and cultural offerings, while the CDP data do not. The CDP data include people from outside California who attend arts events or venues in the state, while the SPPA includes participation by California residents in arts and cultural activities

outside of the state. The CDP data include attendees of all ages, while the SPPA data survey only adults. The two are thus not closely aligned, but each offers an important view into how people patronize arts and cultural offerings.

Attendees

From Cultural Data Project responses, we estimate that people participate in California arts and cultural offerings at least an estimated 137 million times annually. The CDP numbers include both Californians and visitors from elsewhere. Visits by school children make up 14% of attendance figures, and 62% of the time, participants pay no fee (Table 3).¹⁰

TABLE 3. ANNUAL ATTENDANCE NUMBERS, CALIFORNIA ARTS AND CULTURAL NONPROFITS, 2007–2009

Total Attendance	137,097,000
Paid Attendance	51,577,000
Free Attendance	85,520,000
Classes/Workshops	8,672,000
School Children	19,456,000
Groups of School Children (# of Groups)	224,000
Other Groups (# of Groups)	304,000

Sources: Cultural Data Project (CDP, N=1,189) weighted to National Center for Charitable Statistics (NCCS, N=10,746) by budget size and organizational focus. Values rounded to nearest thousand.

Participation rates, our interviews suggest, are likely even higher than those recorded in attendance counts. Thousands enjoy large festivals organized by groups like Malki Museum in Banning and We The People Cultural Arts Group in Riverside public parks where participants are not counted. Organizations like Scraper Bikes (as reported later in document) and Taller Tupac Amaru heavily disseminate their work on the Internet and have no idea how many people explore and use their work. Recent California studies

that broaden the definition of participation have also recorded high rates of participation in music-making and dance.¹¹

In smaller and ethnically specific organizations, the boundaries between creators and attendees are often fuzzy. KlezCalifornia's events officially have participants, not attendees: the organization has worked for a decade to create a network of Yiddish culture bearers and sites of Jewish and Yiddish culture and practice throughout the Bay Area. Groups that sponsor ethnic dance, parades, and festivals engage people who design and make costumes, build one-of-a-kind floats, and contribute music while also participating as onlookers.

Comparing Californians' participation with the rest of the nation

Californians are fans of the arts and culture at rates that significantly exceed those nationally.¹² In 2008, 54% of Californians over the age of 18 attended at least one arts event compared to 48% in other states (Table 4). Californians attend art museums or galleries, outdoor festivals, and stage plays at higher rates than adult residents of other states.

In 2008, California adults attended an average of 2.5 arts events specified in the National Endowment for the Arts Survey of Public Participation in the Arts, 36% more events than the average number attended by adults elsewhere in the U.S. The number of museum visits by Californians was especially noteworthy. On average, California adults visited an art museum or gallery once in 2008, nearly double the frequency in the rest of the U.S.

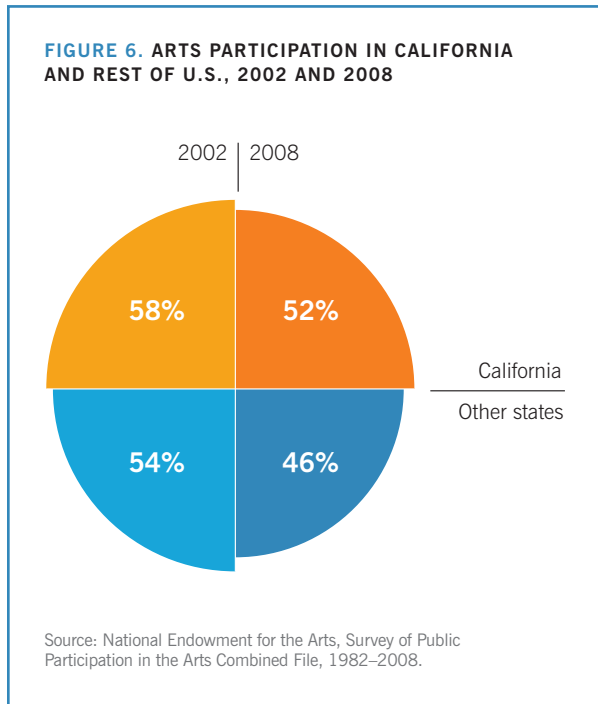
Arts participation among California adults dropped substantially from 2002 to 2008, from 58% to 52% (Figure 6). The participation rate for 2008 in Figure 6 is slightly lower than the one noted in Table 4 because the data here exclude festival attendance, necessary for the comparison over time because the 2002 survey did not include this option. However, the drop in the arts participation was less precipitous in California than in the rest of the country.

What accounts for the higher arts participation rate of California adults compared to residents of other states? Demographic factors provide one explanation. Nationally, arts participation varies considerably by income, education level, and age of adults (National Endowment for the Arts, 2009). Do higher California

TABLE 4. ARTS PARTICIPATION, CALIFORNIANS AND REST OF U.S., 2008

	PARTICIPATION RATE (%)*		AVERAGE # OF ATTENDANCES (# EVENTS)**	
	CALIFORNIANS	REST OF U.S.	CALIFORNIANS	REST OF U.S.
All Types of Events Listed***	54	48	2.5	1.8
Art Museum or Gallery	31	22	1.0	0.6
Historic Park or Monument	28	25	N/A	N/A
Outdoor Festival	25	20	N/A	N/A
Craft Fair or Visual Art Festival	25	24	N/A	N/A
Musical	19	16	0.4	0.4
Play	13	9	0.3	0.2
Classical Concert	11	9	0.3	0.3
Jazz Concert	11	7	0.3	0.2
Salsa	10	4	0.3	0.2
Dance, Including Ballet	8	7	0.2	0.2

Source: National Endowment for the Arts, Survey of Public Participation in the Arts Combined File, 1982–2008. Includes participation in commercial, nonprofit, and informal arts. *Percent of the adult population (18+ years old) attending at least one of listed events in past year. **Measured across total adult-age population (18+ years old). ***Also includes opera attendance but excludes salsa due to small sample size.



participation rates simply reflect differences in the socioeconomic character of state residents as compared to other Americans?

Demographic factors influence arts participation of California adults substantially. Measuring attendance at least once annually at any event listed in Table 5, women are more likely to attend arts events than men, and older adults (up to age 65) are more likely to attend than younger ones (Table 5). High-income Californians are about twice as likely to attend arts events as low-income Californians. Similarly, highly educated Californians are about twice as likely to attend arts events as those with a high school education or less. Among racial/ethnic groups, White non-Hispanics are most likely to attend arts events, while Asians and Latinos are least likely. African Americans are just above the average in the rest of the nation. However, here and in the following discussion, readers should keep in mind the relatively narrow definition of the arts included in the SPPA.

To determine which demographic factors have the most influence on arts attendance, we conducted a logistic regression (see appendix for details about method and results). The results indicate that family incomes above \$60,000 and education at the B.A.

level or higher are statistically significant predictors of higher arts attendance. Gender also matters—the odds of women attending arts events are 36% higher than for men.

Do these demographic factors account for the difference in California's arts participation rate, compared to the rest of the nation? Controlling for all factors simultaneously—age, family income, race/ethnicity, sex, education level, and metropolitan status (whether the individual lived in a metropolitan area)—does not fully explain Californians' greater propensity to participate in the arts.¹³ The odds of a California adult attending at least one event were 25% higher than for other American adults, after controlling for the factors listed.

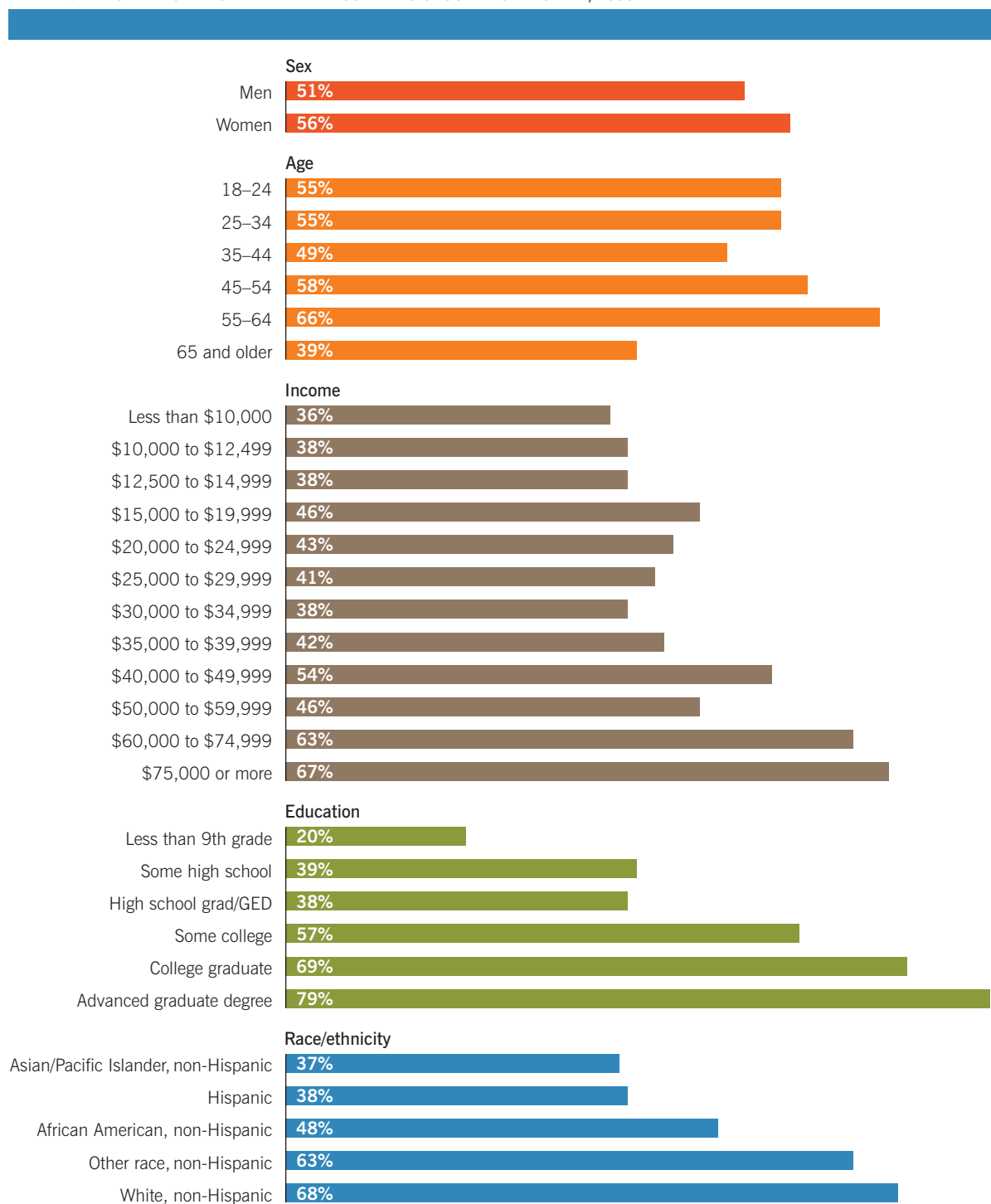
Differing California participation rates by region

Californians' relatively high participation rates are not equally spread across the state's regions. In 2008, more than 14 million California adults attended arts events (Table 6) with residents of the San Francisco Bay and Los Angeles regions accounting for more than 70% of that total. San Francisco Bay Area residents were especially avid arts attendees, with a participation rate of two-thirds (66%).¹⁴

High San Francisco Bay Area participation rates account for much of the variation between Californians and the rest of the nation. After controlling for the demographic factors noted above, the odds of a Bay Area resident attending an arts event are 81% higher than for other Californians.¹⁵

If socioeconomic characteristics do not explain high Bay Area appetites for arts and culture, then other factors associated with preferences must account for them. One possibility is that in earlier decades, Bay Area people who cared greatly about arts and culture—artists as well as arts lovers—built and funded nonprofit organizations that expanded the region's portfolio of offerings. Over time, these attracted more creators and fans to move into the region.¹⁶

TABLE 5. ARTS PARTICIPATION RATE BY DEMOGRAPHIC GROUP IN CALIFORNIA, 2008



Source: National Endowment for the Arts, Survey of Public Participation in the Arts Combined File, 1982–2008.

TABLE 6. ARTS PARTICIPATION BY CALIFORNIA REGION, 2008

	PARTICIPATION RATE (%)	NUMBER OF ANNUAL ARTS PARTICIPANTS (1,000s)	NUMBER OF ATTENDANCES AT SELECTED ARTS EVENTS (1,000s)
San Francisco Bay Area	66	3,716	22,855
Los Angeles Metro Area	54	5,422	24,594
South Coast and Border	52	1,101	3,852
Sacramento Metro Area	50	735	1,504
San Joaquin Valley and Inland Empire	42	2,466	9,780
Rest of State	60	974	4,515
Total State	54	14,414	67,059

Source: National Endowment for the Arts, Survey of Public Participation in the Arts Combined File, 1982–2008. Refer to “Participation Analysis” section in Technical Appendix for methodology (geographic limitations, types of events, etc.) and confidence intervals.

Such capacity-building also likely nurtured growing interest among current residents and newcomers who arrived for other reasons. If this place-based preference for arts and culture resulted in a premium placed on quality arts in the schools and adult educational forums, the dynamic growth of arts participation would have been further enhanced. Researchers have found that the level of arts learning that takes place during childhood and/or adulthood serves as a strong predictor of adults attending the kinds of arts events that we measure (Rabkin and Hedberg, 2011).

Thus in the Bay Area, we infer that a process of arts and cultural “placemaking” evolved, generating an arts and cultural ecology that as a whole is now greater than the sum of its individual participants. We further explore place-based characteristics that help explain differential arts organizational presence in our section on regional arts and cultural ecologies.

SECTION FOUR

Workers, Volunteers, Contributors

The people who bring Californians their nonprofit arts and culture are a diverse crew. More than 709,000 work in the sector as employees, contractors, volunteers, and board members, many of them part-time. Those engaged for pay earn more than \$1.9 billion annually from their work. Well over two million people make financial contributions.

Workers

The California nonprofit arts workforce is large, diverse, and spread among cities and regions. It encompasses large numbers of people, especially artists but also programming staff working part-time or on contract, a feature that distinguishes arts nonprofits from for-profit and public arts organizations. This diversity in work patterns reveals the management and human resource challenge for the nonprofit arts organization: large shares of the direct workforce are working less than full time and on contract rather than payroll.

California nonprofit arts and cultural organizations pay more than 137,000 people for their labor (Table 7). Artists comprise more than half of the total. A remarkable 77,700 artists earn at least some income from the California arts and cultural nonprofits. However, they log many fewer hours than other workers, the equivalent of just 10,300 full-timers, shown in Table 7 as FTEs (full-time equivalents, that is, the number of positions in a personnel budget). Only 8% of them find full-time work in the sector, suggesting why so many simultaneously work in the for-profit arts or in jobs unrelated to their creative skills (Markusen, Gilmore, et al., 2006).

Administrators and fundraisers, in contrast, are highly likely to work on payroll full time, perhaps because of sensitive proprietary strategy and information involved in their work (Figure 7). People working in programming are more apt to work part-time than

TABLE 7. CALIFORNIA PAID ARTS AND CULTURAL WORKERS

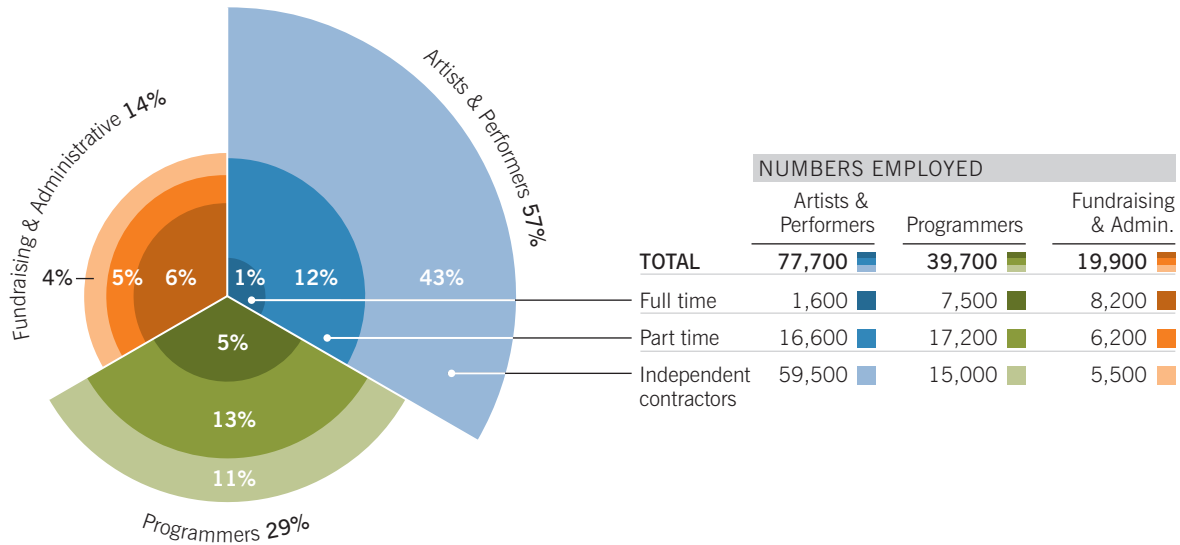
	TOTAL	FTE
Artists & Performers	77,700	10,300
Program-All Other	39,700	16,000
Fundraising, Administrative	19,900	11,700
Total Paid Workers	137,300	37,900

Sources: Cultural Data Project (CDP, N=1,046) benchmarked to National Center for Charitable Statistics (NCCS 2008 CORE-PC, N=4,855). See "Economic Impact Analysis" section of the Technical Appendix for methodology. Excludes interns and apprentices. Values rounded to nearest hundred.

full time or as contractors. Overall, then, less than 13% of people paid by arts and cultural organizations are working full time, though they account for 45% of hours logged. Along with interns, apprentices, and volunteers, the part-time and often intermittent nature of the nonprofit arts and cultural workforce presents full-time managers with a considerable personnel challenge.

In interviews, we found that many small arts organizations have few or even no paid administrators, devoting whatever resources they have to programming. Some consider this a virtue, while others struggle with it. With a \$375,000 annual budget, WorldBeat Center pays its executive director on contract, as it does all of its artists—they receive some reimbursement of their off-site living expenses. Only one of its three paid staff members works full time. This structure is sustainable for them. On the other hand, the smaller and younger Los Angeles-serving Garifuna American Heritage Foundation United has no paid leaders or employees. Its executive director serves without pay, and a core of volunteers act as staff on an as-needed basis. Its board believes that paid leadership and staff are essential to sustain and expand the organization.

FIGURE 7. TOTAL SHARES OF EMPLOYMENT



Sources: Estimated by authors from Cultural Data Project and National Center for Charitable Statistics. Percentages may not add to role shares due to rounding.

Volunteers, contributors, board members

In addition to a large paid workforce, California's arts and cultural nonprofits engage almost twice as many people who give of their time, energies, and skills without pay. An estimated 572,000 people donate time for no or little monetary compensation as volunteers, interns, and apprentices (Table 8). They devote modest amounts of time—on average three-and-a-half hours per week on an annual basis, though some of these hours are bunched into summer or seasonal work. California arts and cultural organizations reported an estimated 2.2 million contributors, a likely overcount because some people give to multiple organizations. By serving on governing boards, another 61,000 individuals give of their time, experience, and talent on a volunteer basis. The size of this board pool underscores the significance of whole organizations rather than just programs within them.

Volunteers, as noted above, are more important to smaller arts and cultural organizations than large ones. Organizations with budgets over \$250,000 report an average of two or fewer volunteers for every one

paid staff member, but for those between \$25,000 and \$250,000, the ratio is seven to one. For instance, the volunteer-led South County Historical Society in Arroyo Grande operates four museum spaces that log 18,000 visits on \$80,000 a year. Volunteers put in a collective 6,000 hours doing everything from acting as guides to food service, grounds care, improvements, repairs, and maintenance. For We The People's annual Riverside International Drum, Mask, & Dance Festival, volunteers do most of the administration, promotion, and planning; at the event, they help vendors set up, work the gate as greeters, and pass out programs.

Californians broadly support arts and cultural nonprofits through generous financial contributions. Arts nonprofits receive charitable donations from an estimated 2.2 million individual contributors annually (Table 8). Some of these individuals contribute to multiple organizations.¹⁷

When in-kind donations of space, equipment, services, and materials and the value of volunteer time are taken into account, arts organizations' collective arts productivity and economic impact are much larger than reported budgets convey. Few organizations fully monetize the "in-kind" contributions of their volunteers, space, equipment, materials, and services, but when asked, many speculate that their budgets would be many times larger if they had to pay for them. For instance, San Diego's WorldBeat Center values its volunteer and in-kind contributions at \$250,000, about two-thirds of its actual \$375,000 annual budget. Santa Ana's Breath of Fire Latina Theater Ensemble estimates that its volunteer teachers and donated materials and space would cost them \$150,000 on top of their \$60,000 budget. Sacramento's Capital Film Arts Alliance would have to increase its tiny \$5,000 budget five-fold to cover the value of donated leadership and administrative services.

Before leaving this account of people's involvement in nonprofit arts, it is worth underscoring that the boundaries between roles as managers, creators, presenters, members, volunteers, and audience members are often blurred. In many organizations, volunteers attend and participate in the events they support. Artists are often directors. Members may be participants in festivals or dances at one point, teachers at another, and viewers at yet other times. In smaller arts organizations (see REACH LA inset as reported earlier), those served often become volunteers, in turn recruiting and serving others.

TABLE 8. CALIFORNIA VOLUNTEERS, INTERNS, APPRENTICES, CONTRIBUTORS

	NUMBERS	FTE
Volunteers, Interns, Apprentices	572,000	50,000
Board Contributors	61,000	-
Individual Contributors*	2,235,000	-

Sources: Cultural Data Project (CDP, N=1,189) weighted to National Center for Charitable Statistics (NCCS, N=10,746) by budget size and organizational focus. Values rounded to nearest thousand. *Not including board contributors.

SECTION FIVE

Regional Arts and Cultural Ecologies

The presence and character of California's arts and cultural organizations and participation rates in arts and cultural activities vary across the state's regions, among its cities and towns, and by neighborhood within cities. Distinctive landscapes and histories, population settlement patterns, socioeconomic differences, and creativity have bestowed on regions and communities their own animated mix of offerings and patronage. In this section, we explore the nonprofit arts and cultural presence and focus in the state's ten "macro" regions.¹⁸ In the following subsection, we break down arts and cultural distributions further to explore features of the communities that help explain variations across place.

The distribution of arts and cultural nonprofits by region

California's largest metros host the lion's share of the state's arts organizations. The Bay Area and Los Angeles regions combined account for an estimated 65% of all California arts and cultural organizations. In contrast, the North Coast and North State, Northern Central Valley, and Sierra regions host the fewest absolute numbers of organizations—2% of the state total for each (Table 9).

However, some of California's less densely populated regions show a strong commitment to arts organizations. On a per capita basis, the Sierra (5.6 organizations per 10,000 people) and North Coast and North State (5.2) regions host more arts organizations than does the state as a whole (Figure 8).

Our interviews shed light on the character and variety of smaller arts organizations in the more thinly populated northern, mountain, and desert regions and how they serve their constituencies. Rural cultural capacity may serve constituents locally and farther afield through a mix of festivals, shows, and tourism. For example, the 45-year-old Malki Museum

on the Morongo Reservation in Banning preserves and displays Cahuilla cultural artifacts, houses the scholarly Malki-Ballena Press, and runs three seasonal Native American festivals a year that draw thousands of attendees from as far away as Europe.

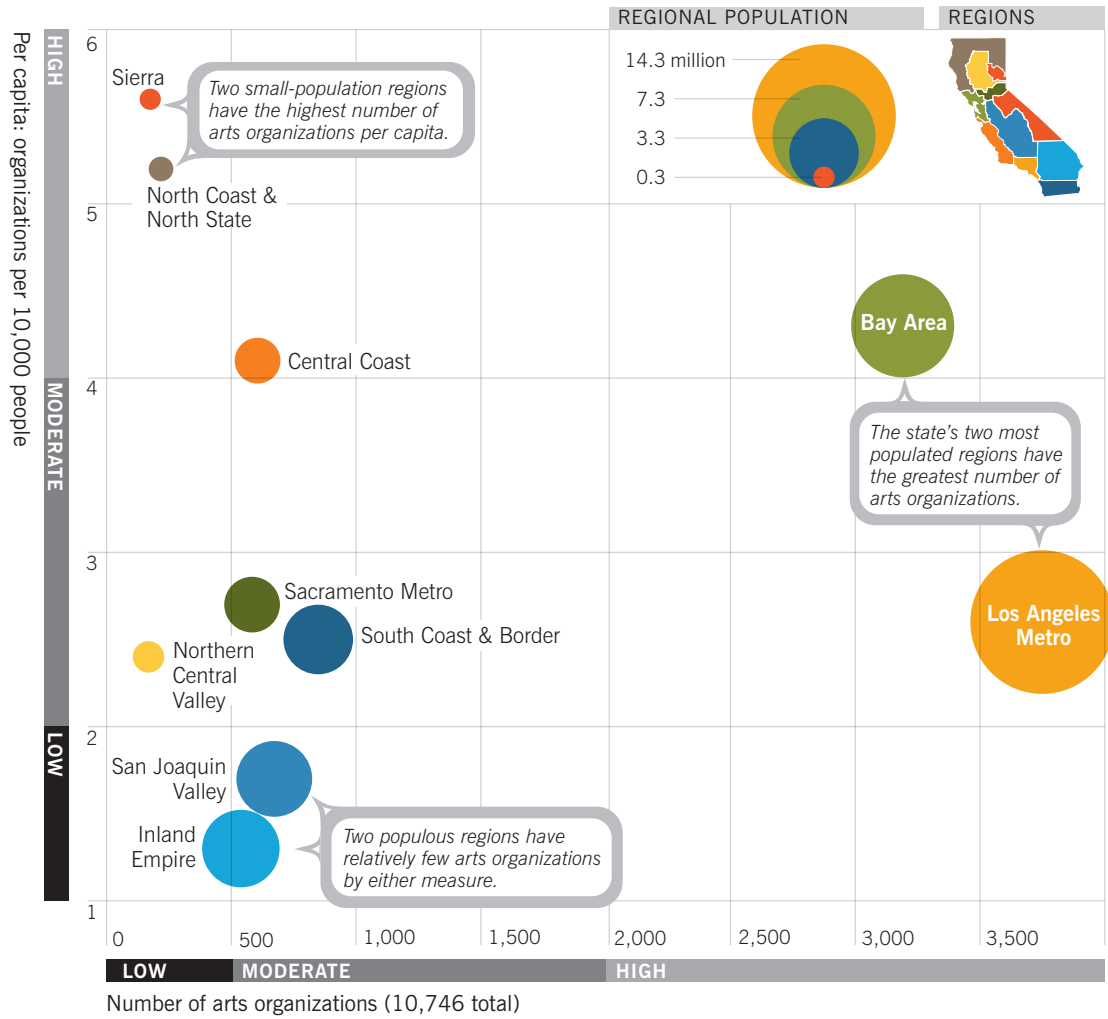
Other rural and small town-based organizations nurture distinctive artistic and cultural practices across thinly populated regions, traveling and using websites and social networking to reach constituents. Based in Redding since the 1970s, the California State Old Time Fiddle Association—District 6, teaches and performs unaccompanied fiddle music throughout the northern counties of Del Norte, Siskiyou, Modoc, Humboldt, Trinity, Shasta, Lassen, Tehama, and Plumas. Since 1989, the Humboldt-based Institute of Native Knowledge has been supporting Wiyot, Yurok, Hupa, Tolowa, and Karuk artists and cultural practices throughout northern California.

Nonprofit arts focus and budget size by region and population density

California regions vary dramatically in size of population. Some land-extensive regions have very low population densities. Larger organizations thrive more easily in large, densely populated metros, reflecting both economies of scale in reaching arts participants and high concentrations of artists and designers.¹⁹ However, on a per capita basis, some predominantly rural regions support more organizations than the larger regions do, although those organizations tend to be smaller in size.

California's more populous regions host both larger arts organizations and more of them in absolute numbers than other regions (Table 9). The Los Angeles region supports proportionately more very large arts organizations, measured by budget size, while the more thinly populated North Coast and

FIGURE 8. ARTS AND CULTURAL ORGANIZATIONS BY REGION



Sources: National Center for Charitable Statistics; Cultural Data Project.

TABLE 9. CHARACTERISTICS OF CALIFORNIA ARTS AND CULTURAL ORGANIZATIONS BY REGION

	POPULATION	# OF ORGS	% CALIFORNIA ORGS	AVERAGE # ORGS PER 10,000 PEOPLE	AVERAGE ANNUAL BUDGET*
Los Angeles Metro	14,325,209	3,749	35	2.6	912,607
Bay Area	7,378,178	3,190	30	4.3	615,422
Inland Empire	4,167,153	538	5	1.3	268,808
San Joaquin Valley	3,984,340	672	6	1.7	153,828
South Coast and Border	3,364,890	848	8	2.5	408,638
Sacramento Metro	2,155,116	583	5	2.7	538,775
Central Coast	1,458,990	605	6	4.1	300,982
Northern Central Valley	686,772	168	2	2.4	109,061
North Coast and North State	421,202	218	2	5.2	223,965
Sierra	313,658	175	2	5.6	102,039
Total	38,255,508	10,746	100	2.8	610,485

Sources: National Center for Charitable Statistics (NCCS), Cultural Data Project (CDP). N=10,746. *2010 dollars.

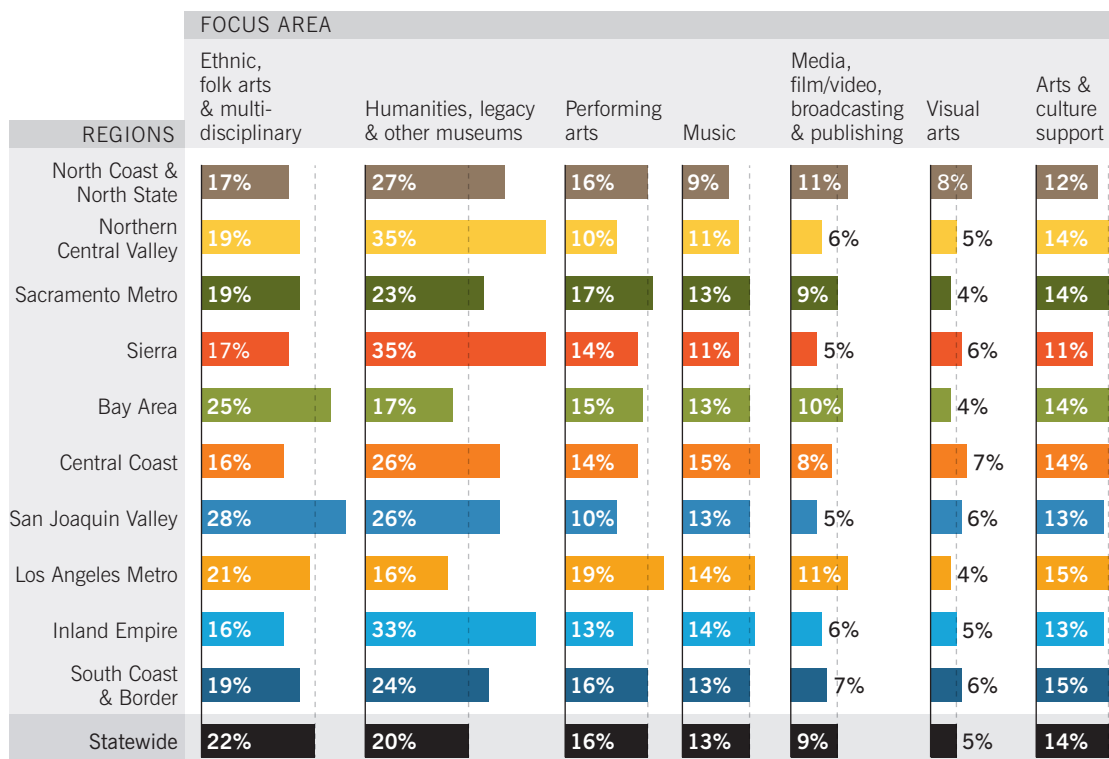
North State, Northern Central Valley, and Sierra regions support proportionately more smaller ones. The San Francisco Bay Area is home to substantially higher numbers of organizations per capita than other populous regions, while the Los Angeles and Sacramento regions fall below the state per capita average. Some less populous regions—Sierra, Central Coast, and North Coast and North State—host above-average numbers of arts organizations per capita.

Only the Los Angeles area and Bay Area have higher than average organizational budget size. In contrast, the relatively populous regions of the Inland Empire and San Joaquin Valley host organizations that, on average, have budgets well below the overall state average, an ecological feature they share with the less populous Northern and Sierra regions.

California's regions also vary in the disciplinary and mission focus of their arts and cultural organizations. However, here there are no consistent patterns of difference between heavily and thinly populated regions. Larger shares of San Joaquin Valley and Bay Area arts organizations focus on ethnic, folk art, and multidisciplinary arts, while the Central Coast and Inland Empire host lower than average concentrations in these focus areas (Figure 9). Larger shares of Northern Central Valley, Sierra, and Inland Empire organizations specialize in humanities, legacy, and other museums than elsewhere (33% compared with 20% statewide).

Performing arts loom large in some regions while media, visual arts, and arts and cultural support organizations are more important in others.

FIGURE 9. FOCUS AREAS OF ARTS AND CULTURAL ORGANIZATIONS BY REGION



Sources: National Center for Charitable Statistics; Cultural Data Project. N=10,746

TABLE 10. ANNUAL BUDGET-SIZE* RANGES OF ARTS AND CULTURE NONPROFITS BY REGION

	<\$25K (%)	\$25K– \$250K (%)	\$250K– \$500K (%)	\$500K– \$2M (%)	\$2M– \$10M (%)	\$10M+ (%)	Total (%)
Los Angeles Metro	48	37	6	6	3	1	100
Bay Area	44	37	7	8	3	1	100
Inland Empire	53	35	5	5	1	1	100
San Joaquin Valley	56	35	4	4	1	0	100
South Coast and Border	47	37	6	6	2	1	100
Sacramento Metro	53	33	5	5	2	1	100
Central Coast	45	39	6	7	3	1	100
Northern Central Valley	59	35	4	1	1	0	100
North Coast and North State	50	39	4	6	0	0	100
Sierra	49	40	7	4	0	0	100
Statewide	48	37	6	7	2	1	100

Sources: National Center for Charitable Statistics (NCCS); Cultural Data Project (CDP). N=10,746, *2010 dollars.

The performing arts account for outsized shares in the Los Angeles and Sacramento Metros, while the San Joaquin Valley is the least likely to be home to performing arts organizations. A higher percentage of Central Coast organizations focus on music than elsewhere, while the North Coast and North State region specialize more in the media and visual arts. Los Angeles and the South Coast and Border regions host larger shares of organizations engaged in arts and cultural support.

Similarly, regional arts ecologies host contrasting portfolios of organizations by budget size. Fiscally smaller arts organizations—those with budgets under \$250,000—comprise higher shares in the Northern Central Valley, San Joaquin Valley, Inland Empire, Sacramento, Sierra regions, and North Coast and North State regions than elsewhere (Table 10). In contrast, organizations with budgets above the half-million mark account for higher proportions in the Bay Area, Central Coast, Los Angeles, and South Coast and Border regions.

We also found, using data from the Foundation Center and the California Department of Finance, that private philanthropic funding per capita is highly

skewed across California regions (Table 11). It varies from \$24 per capita in the Bay Area to less than \$1 per capita in the San Joaquin Valley. Below, in an analysis of California cities, we show that private philanthropic funding per capita is a major correlate of arts organizations' presence.

TABLE 11. PRIVATE PHILANTHROPIC FUNDING* FOR ARTS AND CULTURE PER CAPITA, BY REGION

REGION	PER CAPITA FUNDING
Bay Area	23.5
Los Angeles Metro	17.3
Central Coast	16.1
Sacramento Metro	6.5
South Coast and Border	3.8
Northern Central Valley	3.8
North Coast and North State	1.4
Inland Empire	1.1
Sierra	1.1
San Joaquin Valley	0.6

Sources: Foundation Center, 2008; California Department of Finance. *2008 dollars.

SECTION SIX

The Role of Place in Arts and Cultural Diversity

Why do presence, size, focus, and participation rates of California's arts and cultural organizations vary across the state's regions? As we have shown in our participation analysis, the characteristics of individuals alone cannot explain regional participation rate differences, particularly why Bay Area residents participate more than other Californians. But we can use community characteristics at the city level for help in interpreting these differences. We find that place-based characteristics matter greatly.

The attributes of place shape how arts participation varies from one community to another. For example, an individual with aspirations to participate in the arts may find more opportunities in cities with more people (places with higher populations permit more economies of scale and therefore more venues for the arts), higher population densities (making it easier for arts participants to travel to arts venues), and larger pools of wealth (generating endowments and patronage) than in places with fewer and more dispersed residents or a smaller wealth base. Those interested in ethnic dance are likely to find dance concerts more easily in cities with larger ethnic or immigrant communities.

In other words, community matters. The combination of people with place explains the longer-term evolution of local arts and cultural ecologies. Arts and cultural organizations depend on collective, not just individual, actions and commitments for their continued existence. To reveal community characteristics that matter, we explore the association between arts and cultural organizational presence, budget size, and focus with city-by-city variations in population size and density; primary city status; jobs per capita; city government and private philanthropic funding for arts activity; and residents' income, wealth, educational attainment, race/ethnicity, immigrant status, and age.

Distributions of arts and cultural organizations by city size

Most of California's cities host only a few arts organizations. The typical (median) number of organizations per city is eight, and three-quarters of cities are home to 17 or fewer. Some cities host many more arts organizations, and collectively these cities contain a large share of all organizations statewide—half are located in just 32 California cities (Table 12). Not surprisingly, many of these cities with a significant arts presence are also California's largest by population size. Some medium-sized cities support large contingents as well, most of which are located in major metropolitan areas. California's eight largest cities—those with populations above 400,000—account for a third of all arts and cultural organizations.

On average, smaller cities have higher numbers of arts organizations per capita than larger cities, mirroring the finding above that less populous regions have higher numbers of arts organizations per capita. The smallest cities—the bottom one-fifth ranked by population size—host 14 arts organizations per 10,000 residents, on average, compared with 3 per 10,000 for the top one-fifth, the largest cities. Some smaller cities like Trinidad, Nevada City, Amador City, Sonora, Etna, Bishop, Mount Shasta, and Tehama host eight times or more the typical contingent of arts organizations per capita.

Place characteristics shaping arts and cultural ecologies

We explored four sets of place features that might help explain differences in California's per capita arts and cultural presence at the city level: urban economic, collective socioeconomic, demographic, and private and public funding characteristics. We first

TABLE 12. CALIFORNIA CITIES WITH THE HIGHEST NUMBERS OF ARTS ORGANIZATIONS

	POPULATION	# OF ARTS ORGANIZATIONS	# ARTS ORGS PER 10,000 RESIDENTS
Los Angeles	4,050,727	1,380	3.4
San Diego	1,359,132	470	3.5
San Jose	1,006,846	225	2.2
San Francisco	846,610	824	9.7
Fresno	495,231	121	2.4
Long Beach	490,882	103	2.1
Sacramento	481,356	257	5.3
Oakland	425,368	244	5.7
Santa Ana	355,224	61	1.7
Anaheim	348,041	50	1.4
Bakersfield	333,847	70	2.1
Riverside	300,769	61	2.0
Stockton	289,717	68	2.3
Fremont	215,787	51	2.4
Irvine	212,541	69	3.2
Modesto	209,574	57	2.7
Glendale	206,540	74	3.6
Huntington Beach	202,230	49	2.4
Santa Rosa	161,716	79	4.9
Pasadena	149,640	111	7.4
Torrance	148,558	57	3.8
Visalia	123,473	60	4.9
Burbank	107,682	64	5.9
Berkeley	107,250	187	17.4
Santa Monica	92,161	100	10.9
Santa Barbara	90,099	130	14.4
Walnut Creek	65,915	58	8.8
Palo Alto	64,480	68	10.5
Santa Cruz	59,016	69	11.7
San Rafael	58,359	53	9.1
Culver City	40,507	59	14.6
Beverly Hills	35,953	64	17.8

Sources: National Center for Charitable Statistics (NCCS); Cultural Data Project (CDP); California Department of Finance. Cities listed account for half of all state arts organizations.

explore bivariate relationships between variables in each set and per capita organizational presence by city, followed by a multiple regression analysis that looks at the impact of all in tandem.

Urban economic attributes include primary city status, job concentrations, and housing density. Cities central

to metropolitan areas host more than two-thirds (68%) of California's urban arts and cultural organizations.²⁰ Both high levels of residential density and jobs per capita (reflecting a city's role as an employment center) are associated with greater city presence of arts and cultural organizations (see Table A6 in the appendix for these bivariate measures of association).²¹

Collective socioeconomic characteristics of cities include median household income, income inequality, and educational attainment, measured as the share of the adult population with a bachelor's degree or higher. Arts organizations are concentrated in cities with household income that is close to the median. In other words, cities with either very high or very low median household income are the least likely to host arts organizations. Given that household income is positively associated with arts attendance, as shown in the SPPA analysis presented earlier, this finding may reflect the fact that homogeneous, high-income suburbs often rely on nearby central cities for their arts, while low-income communities may not be able to afford them. Remarkably, the 20% of cities with the greatest income disparities account for an extraordinary 54% of arts and cultural organizations, likely due to relative extremes of wealth and poverty in the central cities that account for outsized shares of arts organizations. Cities with residents with low educational attainment levels also tend to have fewer organizations.²²

Individual characteristics such as age structure, race/ethnicity, and immigrant mix also matter. Communities with a paucity of residents under the age of 18 account for outsized shares of arts organizations, while those with a high incidence of children host lower shares. Diverse communities—those with high (though not the highest) shares of non-whites—account for the greatest proportions of arts organizations, perhaps reflecting the racial diversity of the state's largest cities. In contrast, the 40% of cities with the least minority presence account for only 31% of arts organizations. The results are similar for immigrant presence—cities with higher concentrations of immigrants host an outsized share of arts organizations.²³

Finally, we also found that private and public funding for the arts matters. The 20% of cities with the highest per capita private philanthropic arts funding are home to nearly two-thirds (64%) of the state's arts organizations, while the 20% of cities with the highest public arts-related city budget expenditures per capita are home to half (51%) of all arts organizations. Our

measure of private philanthropic funding includes foundation funding only, including grants awarded from nonlocal organizations; it does not include individual philanthropic contributions, either local or nonlocal.

Which of these factors that distinguish cities are most important, after controlling for the others? A correlation between any one city characteristic, such as median household income, with per capita arts and cultural organizations does not mean that the characteristic alone is the cause of organizational endowment. Various factors may be at work, with some more influential than others. To evaluate the relative importance of the city features noted above in predicting numbers of organizations per capita, we conducted ordinary least squares (OLS) regressions, also controlling for regional location of cities in addition to the city features listed.²⁴

The city features mostly closely and positively associated with higher per capita arts and cultural organizations are job density, levels of private philanthropic funding for the arts, levels of educational attainment, and personal wealth of city residents (see the appendix for more information on the regressions results). Regional location did not prove to be a statistically significant predictor of the prevalence of per capita organizations after controlling for the other factors, which is strong evidence that community-level characteristics of places play the more important role in explaining arts and cultural activity.

The job density finding is particularly of interest. Our measure, the number of people working in a community divided by the number of people living there, distinguishes job centers (places with high numbers of jobs compared to the residential population) from bedroom suburbs, retiree enclaves, and other communities with relatively fewer jobs to population. We speculate that job center cities are more likely to host businesses whose owners, managers, and employees may contribute to local arts and culture through patronage or contributions. Businesses may feel that strong arts and cultural offerings enhance employee motivation, help them

attract and keep employees, and, for retail, encourage customers. Workers commuting from nearby communities may attend venues or participate in arts and culture events at lunchtime or after work, and because of familiarity, bring their families and friends there on the weekends. Job centers are apt to generate more in property taxes that are available to fund arts and culture, among other priorities, since business property tax rates are higher than residential rates.

The jobs-per-capita measure is not strongly correlated with either city size or central city status. Thus historic city-centeredness is not at work here. Our findings may reflect the fact that the larger California metro areas, especially Los Angeles and the Bay Area, are quite polycentric, especially compared with East Coast and Midwestern cities. Communities like Long Beach, Culver City, Santa Monica, Pasadena, San Jose, Oakland, and Berkeley are both job-rich and arts and cultural hubs. Thus our analytical work at the community level suggests a mosaic of diversified hubs within the state's arts and cultural ecology, a complement to our finding of activities that are dispersed across the entire state and higher than average per capita arts organizational presence in smaller, mainly northern, regions.

Place-based influences on arts and cultural participation in California

Our findings confirm that place is a powerful crucible for molding California's arts and cultural ecology. As shown above, in exploring the unusually high arts participation rates of people in the Bay Area region, we found that individual characteristics alone could not explain that phenomenon. We proposed an evolutionary process where the region's residents started and invested in nonprofit arts and culture in ways that then drew arts-loving migrants from elsewhere and more local residents into the creative sphere. Interestingly, Bay Area arts and cultural nonprofits' budget size and focus patterns are not that much different from those statewide, though a focus on ethnic, folk, and multidisciplinary activities is more prominent than in other populous areas of the state.

However, the Bay Area's numbers of organizations per capita markedly exceed those of other populous areas of the state.

Our place-based analysis takes the story a step further. It confirms that certain communities—in particular, job centers that also attract well-educated, wealthier residents—are more apt to provide a home to arts organizations, regardless of region. These communities are able to capture more philanthropic arts funding, which in turn reinforces a “virtuous cycle” of arts presence and attendance. Our analysis also finds that the per capita presence of arts and cultural organizations is correlated with attendance at the regional scale.

These findings confirm that place and community are important shapers of the diverse map of California's arts and cultural ecology. Arts advocates, fans, and funders may find these insights on city characteristics helpful in thinking about how to strengthen this ecology: what kinds of organizations by focus area and organizational scale are underrepresented and/or most likely to thrive in cities with particular urban economic attributes, collective and individual characteristics, and public and private funding structures?

SECTION SEVEN

Intrinsic and Economic Impacts

California's arts and cultural nonprofits generate both intrinsic and economic benefits. Intrinsic benefits involve arts and cultural experiences for their own sake, while economic impact is one of several instrumental benefits generated by arts and cultural activity—neighborhood revitalization is another (McCarthy et al., 2004). In this section, we first document intrinsic benefits by summarizing what the CDP reveals about arts offerings in the state. We then estimate employment, income, and output impacts for the state and regions and for benefiting sectors outside of arts and culture.

Arts and cultural offerings

The nonprofits studied here principally serve arts and cultural missions. They are not economic development organizations. Annually, California's more than 10,000 nonprofits offer up a rich and diverse portfolio of events and cultural experiences to Californians and visitors. Organizations both large and small commission and create new works—plays, musical compositions, sculpture and other visual art—that add to California's and the world's repertoire. On average, California's arts nonprofits are open to the public 18 hours a week for programs and performances.

Each year, the state's arts nonprofits offer an estimated 277,000 performances.²⁵ Almost one in four of these take place away from the organization's home base (Table 13). Even very small and cash-strapped groups go on tour. Los Paisanos de Selma, a Mexican ballet folklórico dance troupe on the outskirts of the Fresno area, takes high schoolers to Mexico to perform every year. Downtown Los Angeles-based hereandnow, a pan-Asian American theater company, produces two original shows a year and performs them in black box venues around the U.S.

Surprisingly, nonprofit arts and cultural organizations offer more educational programs and workshops than productions and exhibits. They provide an estimated 167,000 educational classes and workshops for the public and 53,000 off-site school programs each year (Table 14). Organizations of all sizes are engaged in educational activities. Large museums often run workshops and guided tours for K–12 students centered around their current exhibitions. Modest-sized Very Special Arts at Sacramento (VSA California) works with teachers and places disabled artists in school classrooms across multiple sites in California, including Merced and Yuba counties.

California's arts and cultural nonprofits generate new and enduring artworks—they commission an estimated 41,000 theater, dance, musical compositions, and artworks annually (Table 14). Both large and small urban organizations produce avant-garde works; others use traditional cultural practices in new, innovative ways. Santa Ana-based Breath of Fire Latina Theater Ensemble is building a body of new dramatic work, presentation skills, and audiences for Latina performing arts. De Rompe y Raja Cultural Association, an Alameda-based organization that documents and celebrates African and Spanish influences on Peruvian coastal music, encourages younger American-raised Peruvians to innovate with

TABLE 13. ANNUAL ARTS PERFORMANCES, CALIFORNIA NONPROFITS, 2007–2009

	NUMBER OF EVENTS*
Public Performances—At Home	224,000
Public Performances—Away (on tour)	53,000
Total Number of Performances	277,000

Sources: Cultural Data Project (CDP, N=1,189) weighted to National Center for Charitable Statistics (NCCS, N=10,746) by budget size and organizational focus. Values rounded to nearest thousand. *Each counts only once, even if offered repeatedly.

TABLE 14. ANNUAL CLASSES, WORKSHOPS, COMMISSIONS, ARTS EVENTS, CALIFORNIA NONPROFITS, 2007–2009

	NUMBER OF EVENTS*
Productions	110,000
Permanent Exhibitions Displayed	3,000
Temporary Exhibitions Displayed	29,000
Educational Classes/Workshops—for the public	167,000
Educational Classes/Workshops—for professionals	20,000
Tours	66,000
Films	77,000
Lectures	23,000
Openings	17,000
World Premieres	17,000
National Premieres	13,000
Local Premieres	29,000
Works Commissioned	41,000
Workshops or readings of new works	43,000
Programs—Other	84,000
Off-site School Programs	53,000

Sources: Cultural Data Project (CDP, N=1,189) weighted to National Center for Charitable Statistics (NCCS, N=10,746) by budget size and organizational focus. Values rounded to nearest thousand. *Each counts only once, even if offered repeatedly.

instruments such as the saxophone as played by African American jazz musicians. The Los Angeles Chinese Orchestra composes all-original music for traditional Chinese instruments and performers.

For small ethnic organizations, a cultural mission may have longer-term economic benefits as well. Familia Indigena Unida (see inset), a group that teaches language and cultural heritage to indigenous Mexican immigrants, strengthens cultural practices but also improves the future economic prospects of their intergenerational participants. The same is true of organizations of any size that support the development of artists, both aesthetically and as entrepreneurs. Such longer-term economic payoffs are not included in the economic impact analysis that follows.

Economic impacts

California's nonprofit arts and cultural ecology is an important contributor to the state's economy. Using NCCS and CDP data, we find significant economic impacts, even without patron spending.²⁶ As reported in the Workers section above, the state's nonprofit arts and cultural organizations support 137,000 Californians directly as employees and contractors. Through their expenditures on goods and services in supplier sectors, arts nonprofits generate tens of thousands of additional jobs, termed "indirect."

CULTURAL AND LONG-TERM ECONOMIC IMPACT: FAMILIA INDIGENA UNIDA

San Diego-based Familia Indigena Unida teaches language, writing, and cultural heritage to recent indigenous immigrants from the Oaxaca region of Mexico. By teaching Spanish, English, and the Mixtec language, both spoken and written, the organization helps community members share and value their own identity, knowledge, and experience. Participants have often not finished the second grade, are undocumented, and work as gardeners, housekeepers, and construction workers. Through its Intercambio Cultural Mixteco (Mixtec Cultural Exchange), the organization reaches out to families from other Mexican pueblos as well.

Founded in 2006 by two of the first college graduates from this community, Familia Indigena Unida operates on \$10,000 annually from small grants, which barely covers its rent. The organization relies on 20 to 30 volunteer teachers and two unpaid staffers. Its founder-directors use their University of San Diego connections to recruit students as teachers; the university and two community centers contribute space, printing, and materials.

About 25 families, 70 to 80 young people, and many elders participate, learning how to sign their names, read, and speak new languages. Children receive the help they need to get ahead in school, and all the participants benefit from friendships and an environment where they can relax and which elevates them from their normal routine. Adults no longer have to depend on their children to accompany them to the health-care clinic—they can speak and write Spanish on their own. Pride in their identity is tied to pride in their own independence, a change evident from one generation to the next.

—Carolina Sarmiento

And as their employees and contractors, and those in supplier sectors, spend their incomes, they support many further jobs, termed “induced.” In total, these organizations generate labor income of \$3.6 billion and sales of \$8.6 billion.²⁷ They also generate tax revenues of \$283 million annually to state and local governments, and \$355 million to the federal government. These are conservative estimates, excluding arts-related patron spending on travel, food, and lodging. Based on studies from other states, inclusion of such expenditures could double the size of these impacts.

Annually, California’s nonprofit arts and cultural organizations pay compensation to 137,300 people—37,900 full-time equivalents (FTEs)—both employed and working on contract (Table 7).²⁸ Their direct payroll amounts to \$1.9 billion a year. When the purchases of these organizations and expenditures from their workers’ earnings are taken into account,

TABLE 15. CALIFORNIA OVERALL NONPROFIT ARTS AND CULTURAL EMPLOYMENT, INCOME, AND OUTPUT

	DIRECT	INDIRECT AND INDUCED	TOTAL
Employment (FTE)	39,000	32,000	71,000
Labor Income (billions 2008 dollars)	1.93	1.62	3.56
Total Output (billions 2008 dollars)	3.81	4.73	8.55

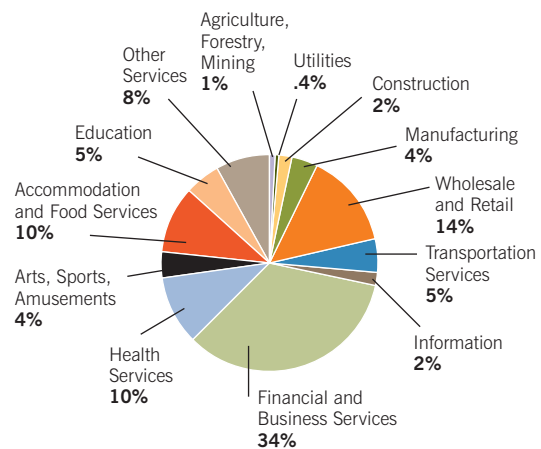
Sources: Cultural Data Project (CDP, N=1,046) benchmarked to National Center for Charitable Statistics (NCCS 2008 CORE-PC, N=4,855), and California IMPLAN Modeling System. *Includes interns and apprentices. Employment rounded to nearest thousand.

the nonprofit arts sector supports 71,000 FTE workers statewide (Table 15). The labor-intensive nature of the sector explains the lion’s share of induced jobs. Arts and cultural organizations spend very large shares of their resources on employees and contractors. In addition to this impact on jobs, the nonprofit arts generate California labor income of \$3.6 billion and total output valued at \$8.6 billion.

Where, by sector, are the indirect jobs generated? Labor, of course, is one sector, but beyond that, arts and cultural organizations procure business services, information services, food services and accommodations, transportation and postal services, utilities, and construction maintenance services (Figure 10 and Table 16). Arts and cultural organizations also pay for services from legal, accounting, advertising, marketing, and design firms. They buy large amounts of goods to make sets, props, and other structures, stimulating the retail and wholesale sector. People employed in these organizations travel, and the organizations pay travel costs for visiting artists and other professionals. Spending by households whose members work in arts and cultural activity are also concentrated in services, leading to significant impacts in areas such as health services and wholesale and retail trade.

How are these economic impacts distributed across California regions? Expenditures are concentrated in the large metropolitan areas and therefore arts-related employment and tax revenues are as well (Figure 11). Employment impacts are largest in Los Angeles and the Bay Area, where arts organizations generate 31,000 and 23,000 jobs respectively (Table 17).

FIGURE 10. NONPROFIT ARTS AND CULTURE EMPLOYMENT IMPACTS BY SECTOR



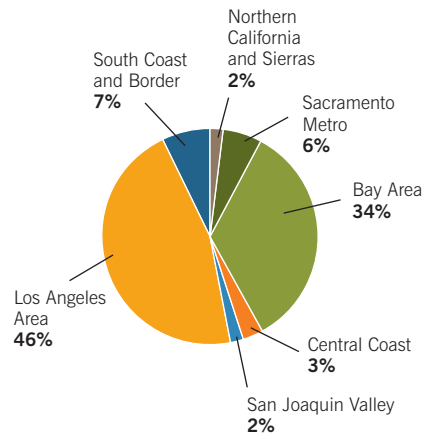
Sources: Cultural Data Project (CDP, N=1,046) benchmarked to National Center for Charitable Statistics (NCCS 2008 CORE-PC, N=4,855), and California IMPLAN Modeling System.

TABLE 16. CALIFORNIA NONPROFIT ARTS AND CULTURAL SECTORAL EMPLOYMENT IMPACTS

EMPLOYMENT SECTOR	FTE EMPLOYMENT
Financial & Business Services	10,700
Wholesale & Retail	4,500
Accommodation & Food Services	3,300
Health Services	3,200
Other Services	2,600
Transportation Services	1,600
Education	1,400
Arts, Sports, Amusements	1,400
Manufacturing	1,200
Construction	800
Information	700
Agriculture, Forestry, Mining	300
Utilities	100
Total Indirect Impacts	31,800
Direct Arts & Cultural Employment	39,200
Total Employment	71,000

Sources: Cultural Data Project (CDP, N=1,046) benchmarked to National Center for Charitable Statistics (NCCS 2008 CORE-PC, N=4,855), and California IMPLAN Modeling System. Employment rounded to nearest hundred.

FIGURE 11. SHARE OF DIRECT EXPENDITURES BY REGION



Source: National Center for Charitable Statistics (NCCS) 2008 Core-PC file. N=4,855. Estimates based on 990-reported expenses.

TABLE 17. CALIFORNIA NONPROFIT ARTS AND CULTURAL EMPLOYMENT (FTE) IMPACTS

	DIRECT EMPLOYMENT	INDIRECT AND INDUCED EMPLOYMENT	TOTAL EMPLOYMENT
San Joaquin Valley	900	500	1,400
Northern California and Sierras	1,100	600	1,700
Central Coast	2,200	900	3,100
Sacramento Metro	1,700	1,800	3,500
South Coast and Border	3,600	2,000	5,600
Bay Area	13,700	8,800	22,500
Los Angeles Area	16,100	15,200	31,200
Statewide	39,200	31,800	71,000

Sources: Cultural Data Project (CDP, N=1,046) benchmarked to National Center for Charitable Statistics (NCCS 2008 CORE-PC, N=4,855), and California IMPLAN Modeling System. Statewide totals are slightly larger than the sum of regional impacts due to the nature of the IMPLAN Modeling System. Values rounded to nearest hundred.

TABLE 18. CALIFORNIA NONPROFIT ARTS AND CULTURAL INCOME IMPACT (MILLIONS OF 2008 DOLLARS)

	DIRECT LABOR INCOME	INDIRECT AND INDUCED LABOR INCOME	TOTAL LABOR INCOME
San Joaquin Valley	33.6	19.4	52.9
Northern California and Sierras	37.9	22.5	60.4
Central Coast	66.1	36.3	102.4
Sacramento Metro	91.1	78.1	169.2
South Coast and Border	146.2	91.8	237.9
Bay Area	700.5	513.0	1,213.5
Los Angeles Area	858.4	768.5	1,626.9
Statewide	1,933.8	1,623.6	3,557.4

Sources: Cultural Data Project (CDP, N=1,046) benchmarked to National Center for Charitable Statistics (NCCS 2008 CORE-PC, N=4,855), and California IMPLAN Modeling System. Statewide totals are slightly larger than the sum of regional impacts due to the nature of the IMPLAN Modeling System.

TABLE 19. CALIFORNIA NONPROFIT ARTS AND CULTURAL OUTPUT IMPACT (MILLIONS OF 2008 DOLLARS)

	DIRECT OUTPUT	INDIRECT AND INDUCED OUTPUT	TOTAL OUTPUT
San Joaquin Valley	68.1	58.0	126.1
Northern California and Sierras	79.7	66.1	145.8
Central Coast	121.8	105.5	227.4
Sacramento Metro	207.8	212.5	420.4
South Coast and Border	271.9	263.1	535.0
Bay Area	1,309.2	1,421.3	2,730.5
Los Angeles Area	1,757.0	2,204.8	3,961.8
Statewide	3,815.6	4,731.0	8,546.5

Sources: Cultural Data Project (CDP, N=1,046) benchmarked to National Center for Charitable Statistics (NCCS 2008 CORE-PC, N=4,855), and California IMPLAN Modeling System. Statewide totals are slightly larger than the sum of regional impacts due to the nature of the IMPLAN Modeling System.

Compared to smaller metropolitan and rural areas in California, the Bay Area and Los Angeles Area have relatively strong concentrations of arts employment and generate large increments of arts-related incomes and tax payments. However, each of the other regions also supports thousands of jobs. The thinly populated Northern California and Sierras region supports nearly 1,700 FTE jobs, \$60 million in labor income, \$146 million in total output (Tables 17, 18, 19), and \$4 million in California state and local taxes.

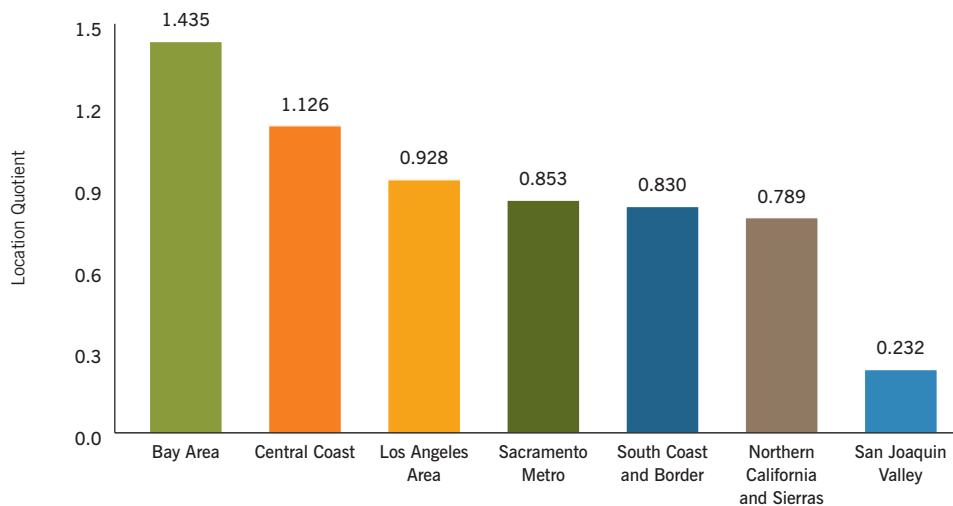
Direct employees (including contractors) of California arts and cultural nonprofits constitute a relatively small share of the state's overall employment, about sixth-tenths of one percent (0.64%), a share that is almost doubled when indirect employment generation is taken into account. Direct arts and cultural employees' share of the total is almost twice the state's average in the Bay Area (1.2%) and Central Coast (1.18%) regions and smallest in the San Joaquin region (0.16%). However, when unusually large numbers of volunteers in this sector are taken into

account, the contribution of human talent, including uncompensated time and energy, are several times the paid labor totals.

With direct and indirect employment generation combined, the Bay Area has about 44% more nonprofit arts-driven employment than the state as a whole (Figure 12).²⁹ The San Joaquin Valley falls far behind in nonprofit arts-driven job shares, at just 23% of the state norm. The Northern California and Sierras region, despite its high per capita numbers of arts organizations, has the second lowest total job generation share, at 79%. Its nonprofits may rely more heavily on volunteers than paid employees and may bring in more arts talent from other regions, reducing overall employment impact.

Because they do not include the impact of patron expenditures incurred in the process of attending exhibitions, performances, and other activities included in this study, these economic impact estimates are very conservative. While traveling primarily to participate in arts and cultural offerings, people often spend considerable amounts on travel, food and beverage services, lodging, souvenirs and gifts, and entertainment. Unfortunately, we do not have data from the CDP or any other source on such patron expenditures. In a recent study in the Puget Sound region of Washington state, patron spending (excluding tickets and admissions) was as large as spending by arts and cultural organizations (Beyers and GMC Research, 2011). Thus with patron spending data included, economic impacts estimated here for California would likely double.

FIGURE 12. NONPROFIT ARTS AND CULTURE-RELATED EMPLOYMENT IMPACT BY REGION



Sources: National Center for Charitable Statistics (NCCS 2008 CORE-PC, N=4,855) and IMPLAN Model Economic Overview statistics. Location quotients calculated by dividing the share of employment supported by nonprofit arts and cultural organizations in each region by the share of employment supported statewide by nonprofit arts and cultural organizations.

SECTION EIGHT

Special Challenges for Smaller Organizations

Smaller arts and cultural organizations often structure their organizations and solve their problems differently than do larger ones. For instance, using CDP data above, we found that smaller organizations rely much more heavily on volunteers than do larger ones. The volunteer-to-paid staff ratio for organizations with budgets between \$25,000 and \$250,000 is seven to one, compared with two to one or under for larger organizations. Although the CDP data are too thin to be certain about volunteer-to-staff ratios for nonprofits below \$25,000, they are likely to be much higher than even seven to one. However, other important ecological features such as incubation and evolution, variations in governance structure, the use of dedicated space, relationships among organizations, and embeddedness in local or international communities are difficult to study with existing data sources.³⁰

Since small organizations and those working in the ethnic, folk, multidisciplinary, and heritage fields are the most underrepresented in existing data sources, we used qualitative interviews to explore variation (see Table A12 in the appendix for a list of organizations and discussion of methodology).³¹ Two-thirds of the interviewed organizations have been in existence for more than a decade, 55% have budgets in excess of \$25,000, and five have budgets over \$250,000 but under \$1 million. Although our cases are drawn from relatively small, often ethnically specific organizations, the variation in dynamics and relationships we identify may also apply to some larger arts and cultural organizations and those in other focus areas. Our findings support the probability that there are features of smaller arts and cultural organizations that set them apart from larger ones. It would be helpful in the long run to encourage new and existing data providers to incorporate categories and metrics that capture features that are important for users who want to broaden their knowledge of the nonprofit arts and cultural ecology.

Start-up and evolution

Arts and cultural organizations both large and small evolve over long periods of time. Most start as small organizations, and many remain modest in size. Less commonly, some merge with others. Small arts organizations may be slow to apply for nonprofit status and may change their names and missions over a long period of gestation, as noted earlier. Unfortunately, current data sources do not easily permit the tracking and morphing of organizations over time.

Some interviewees expressed contentment with current informal structures and articulated their reasons for avoiding nonprofit incorporation (lack of time and money, fear of the burden of reporting requirements, a desire to maintain control). Some are comfortable with their current, flexible form, while others would like to grow and to access grant funding, a major motivation for assuming nonprofit status.

Some of the interviewed organizations that are more established face difficulties engaging young participants. An example is Friends of Allensworth, a group begun in 1985 to celebrate the only historical all-African American settlement in California, founded in Tulare County in 1908. The challenge of an aging constituency may be shared by large organizations and those in other fields; as data sources mature and expand their coverage, it will likely be easier to study these organizational dynamics and how they vary by place, focus, and size.

Governance structures and practices

The median nonprofit arts organization is likely to have a professional executive director and a volunteer board that hires leadership and helps them make decisions. Among small organizations, there is much greater organizational variation. Some remain

informal, while others are structured as collectives or nonprofits. Some small nonprofits have formal membership structures and tailor their governance processes to unique constituencies and missions. In other nonprofits, a founder may continue to make decisions with only nominal board participation. In at least a couple of our cases, conflicts have emerged between founder directors and other engaged staff or volunteers over the future direction of the organization, a phenomenon generally documented in the early stages of nonprofit formation.³²

HanNuRi, a Korean *pungmul* music troupe, is an example of an informal organization where the founder continues to make most decisions, though he consults his volunteer artistic staff and an umbrella organization that provides space and marketing for the group (see inset).

To minimize hierarchy and/or maintain artistic control, small organizations interviewed sometimes choose a collective structure. Taller Tupac Amaru, an Oakland printmaking group of three, has chosen this form to stay small, nimble and in control of its work process. Sacramento's multicultural Sol Collective, dedicated to art and music, functions without a staff; community members participate as board members, volunteers, interns, students, and artists—and provide supplies and programming. Run like a collective, its style combines features of nonprofit and for-profit business models.

Some smaller nonprofit arts organizations have designed highly participatory processes that engage members in decision-making. San Diego's Portuguese Hall (see inset next page), uses a participatory process where formal members elect the board and officers. El Centro Cultural (see inset next page), engages all members in decision-making without hierarchical leadership.

Santa Ana's El Centro Cultural de Mexico uses an unusually democratic format that encourages broad participation in decision-making, including consensual membership meetings on major issues. Further study of varying structures like El Centro Cultural's would amplify our understanding of the state's arts and cultural ecology.

A PORTRAIT IN INFORMALITY: HANNURI

While no small, ethnically embedded arts group is typical, HanNuRi, an organization devoted to the practice, teaching, and presentation of the Korean percussive musical genre *pungmul*, illustrates the leanness, geographical reach, and founder leadership typical of informal arts and cultural organizations that are not formally structured as nonprofits.

A 15-year-old organization, HanNuRi relies almost entirely on volunteers and donations. The troupe's founder, director, and head teacher, Joon Kim, was working as a truck driver until he recently began university-level acupuncture training. Teacher volunteers are unpaid and work day jobs. Parents often cook food to offer teachers and students after classes. Los Angeles' Korean Resource Center provides space for instruction and practice and covers advertising costs, and its missions and goals influence HanNuRi's artistic activities.

Although Kim is regarded as its director, the troupe has no formal structure or hierarchy. Its skilled performers and Resource Center staffers contribute ideas and work together to plan classes and activities. No formal membership system exists—students' regular participation gives them membership status.

HanNuRi's influence extends beyond the Los Angeles area. Its members have helped create troupes in other U.S. cities, and they regularly teach and perform with other groups in Chicago, Philadelphia, and Washington, DC. HanNuRi sends students to Korea to study with masters of the genre, and sometimes invites these masters to visit and teach in Los Angeles.

—Teresa Sanchez and Maria Rosario Jackson

Significance of space

Smaller organizations are more likely to lack dedicated space to create, present, and organize their work than are larger ones. Our interviews with small organizations reveal an extraordinary concern with securing and managing space as well as inventive ways of finding it. No other theme was as common a preoccupation among interviewees.

A few organizations interviewed—like Portuguese Hall, South County Historical Society, and Malki Museum—own and maintain space. For them, it constitutes a major expense and activity. Others use public,

PARTICIPATORY GOVERNANCE AND OPERATIONS: PORTUGUESE HALL—SAN DIEGO

United Portuguese S.E.S. Hall in San Diego, founded and built by immigrants to the Point Loma neighborhood in 1920, serves as a nonprofit community center and mutual aid organization for the city's 5,000 Portuguese and Portuguese-Americans. Capable of accommodating 650 people at once, the Hall hosts Portuguese-American traditional dancers and the Portuguese philharmonic band, a traditional music group. More than a dozen clubs hold events here and meet monthly throughout the year.

The Hall is expensive to own and maintain, but it is self-sufficient, with annual revenues totaling \$336,000 (40% earned, 60% contributed).

Reliable volunteers and a highly democratic decision-making process make this possible. Membership in the Hall is free. The current 800 members on its roster have been voted in by a general assembly. A board of 30, elected annually by members at a general assembly, meets monthly to make decisions. Four volunteer officers (a president, vice president, secretary, and treasurer) are elected from among the board. Almost everything is run by volunteers—the Hall manager and fiscal secretary are paid, but work very limited hours.

—Kate Alexander

HYPER-DEMOCRATIC: EL CENTRO CULTURAL DE MEXICO

Serving recent Mexican immigrants to Santa Ana, El Centro Cultural organizes music, dance, art, English, literacy, theater classes, and space for community participation in rented downtown quarters. It celebrates the Son Jarocho culture of the Veracruz region using stringed and percussive instruments called jaranas made in Veracruz and played at fandangos—festivals based on traditional music and dance. Inclusive of all art forms, El Centro classes range from older women knitting together to young people experimenting with contemporary American music and spoken word.

El Centro is not a place where people are taught culture but where people teach their own culture to others. About 50 people actively participate as voluntarios—unpaid teachers, administrators, coordinators, and organizers who are considered owners rather than staff of the organization. Since community members help organize activities, El Centro makes no distinction between the community served and those working in the organization.

El Centro Cultural's governance structure is unusual but meets nonprofit requirements. Six cuadros (organized groups), each with a volunteer leader who must consult with cuadro members, meet to make decisions. For instance, all teachers are required to attend their cuadro decision-making sessions on programming. Another cuadro handles financial matters, but does not control financial decision-making. Decisions about the space and organization as a whole are made at large inter-generational volunteer meetings through consensus, offering all members a sense of ownership while raising the visibility of volunteer teachers and administrators. The structure is open, bilingual, and rotates facilitation and leadership positions.

—Carolina Sarmiento

community, or commercial space: Barrio Writers, for example, teaches and performs in the Santa Ana Public Library and in local bookstores. The Old Time Fiddlers often play in small town churches. Personal housing space is the venue for creative work for organizations like Taller Tupac Amaru, the Institute of Native Knowledge, and Hālau 'o Keikiali'i, a traditional Hawaiian dance troupe. Some interviewed organizations are constantly hustling space and moving around among venues that include public parks and streets.

The leadership of Riverside's We The People Cultural Arts Group sees its main challenge as lack of permanent, dedicated space. The organization performs in parks, but rents or uses studios pro bono. Free space is preferable, but it often means working around others' crowded schedules. The organization hopes to acquire dedicated space that will also serve as a community cultural arts center. Without it, We The People finds it difficult to reach out to the community.

In another case, a small organization relying on the use of another's space reported disruptions in scheduling and uncertainties that disturbed its programming.

Those that do have dedicated space often speak about its particular features—positive and negative—especially for engaging with their intended participants and community. One organization that made space lemonade out of lemons is WorldBeat Center. After years of seeking a good space, it took out a long-term lease with the city of San Diego on a disused water tower in Balboa Park. The interior is open, with a dance floor in the center and an office and digital audio/visual studio up a set of stairs. The ground level also accommodates a small shop, a café, and a garden.

The responses from these small and ethnic, folk, multidisciplinary and heritage organizations suggest that access to or acquisition of space and how it is managed is a major determinant of the offerings, outreach, and success of small organizations. As arts and cultural ecological analysis improves, this dimension should be easier to study, including the way it works for large organizations and those in other focus areas.

Interorganizational relationships

Most arts and cultural nonprofits enjoy relationships with others in the field. They share insights, resources, space, and staff, and mentor others. Some incubate new organizations, while others craft formal partnerships and even mergers. But because existing data sources collect information on individual organizations and do not include relational questions in surveys, we know little about how these relationships vary by organizational size and focus or what their impact is on arts and cultural offerings and organizational performance.

Our interviews with smaller organizations underscore the significance of such relationships. Some partnerships are the result of outreach, a happy matching of complementary skills, or common artistic content and missions. Some are driven by resource needs. El Centro Cultural, despite its modest space

and budget of \$100,000, operates as an incubator for a number of other organizations and activities, providing them space, resources, administrative services, and business development assistance—Breath of Fire Latina Theater Ensemble and Barrio Writers are two such beneficiaries. Partnering organizations include unions, student organizations, art cooperatives, music groups, and other nonprofits, all heavily immigrant-related and often transnational. El Centro leaves goals and missions up to each organization while holding them accountable for supporting the economic base of the space they all use.

Several arts organizations interviewed are engaged in enduring relationships with non-arts organizations (e.g., churches, social service organizations, community centers) that involve partnering in and sharing finances, space, and creative work. For instance, hereandnow Theatre Company (see inset next page), works out of and performs in two downtown Los Angeles Buddhist temples, while San Bernardino's Asian American Resource Center is deeply engaged in social service activities that complement its arts and cultural programming.

Interorganizational cooperation and mutual support form an important frontier for arts and cultural ecology work. Just as informal networks and collaborations have increasingly been acknowledged as crucial in for-profit business sector success across the board, access to or exclusion from these types of relationships will have a powerful impact on organizational and overall sector programming, viability, and participation.

Embeddedness in community

Smaller arts and cultural organizations are more likely to be embedded in geographic and/or affinity (ethnic, immigrant, age, sexual preference, specialized art form) communities than are large organizations.

Neighborhood or territorial identity was common among our interviewees. Old Time Fiddlers for instance, serves a set of northern California counties, while Los Viejos Car Club serves East Los Angeles. Both have sister organizations in other areas of

NEIGHBORHOOD-EMBEDDED, MULTIETHNIC THEATER: HEREANDNOW

Some arts organizations are deeply rooted in their urban neighborhoods. The hereandnow Theatre Company, a nonprofit pan-Asian American group based in downtown Los Angeles, devotes itself to presenting original work created and produced by members of the company. Founded in 1988 and incorporated as a nonprofit in 2000, the company gives Asian Americans and other people of color a forum to express themselves artistically, continuing an oral tradition. On a budget of less than \$30,000, 90% of it earned at the door, the company produces two original shows each year and performs in black box venues all over the United States.

The theater troupe mirrors its community, primarily the Little Tokyo neighborhood, which is becoming more ethnically diverse. John Miyasaki, the artistic director, founded hereandnow to combat perceptions of careers in the arts as unworthy endeavors for Asian Americans, laying the groundwork of the troupe by finding college students who would act in hereandnow shows. The company works with pre-K and kindergarten students and Japanese American seniors to record and produce works based on their stories. Miyasaki also directs Teatro Nueva Alma at East Los Angeles College, a Latino theater group mentored by hereandnow.

hereandnow cultivates reciprocal relationships with other local organizations. It exchanges space, materials, and expertise with another L.A.-based theater group, Company of Angels. In Little Tokyo, Senshin Buddhist Temple and Higashi Honganji Buddhist Temple, provide office and rehearsal space for the company. Miyasaki sees every other organization as a potential ally and the art world as a place where groups come together to support the larger artistic community in a show of solidarity as funding and opportunities become scarce.

—Kate Alexander

California. Those heavily anchored in place often participate in local business organizations or coalitions built around community issues, sometimes playing leadership roles. Downtown Los Angeles' hereandnow Theatre Company is exemplary in this regard (see inset) as are Los Viejitos and Scaper Bikes in Oakland (see inset next page) in a very different way. Some play important roles in stabilizing their immediate neighborhoods: improving safety, aesthetics, and infrastructure, and providing a sense of community for people more generally. At least half a dozen of those interviewed actively pursue community goals through local politics, using arts and cultural expression in city council presentations, parades, and protests to achieve recognition and action on pressing matters for their communities.

Some organizations serve a local community but also form associations with specific communities farther afield. For example, El Centro Cultural is deeply embedded in Santa Ana, but nurtures relationships between its community and Veracruz, a poor Mexican region that was once home to many young residents of the U.S. The organization brings teachers

from Veracruz to teach Son Jarocho music and sends Santa Ana youth with their innovative versions of traditional music to Mexico. It commissions instruments and costumes from Mexico and markets them to a national network in the U.S., generating income for and economic development in Mexican communities.

Some arts and cultural organizations foster unique aesthetic content while deliberately addressing communities unlike themselves. For instance, San Francisco's Chaksam-pa, the Tibetan Dance and Opera Company, promotes and preserves traditional forms of Tibetan drama, music, and dance for audiences of all ages and backgrounds. It espouses Buddhist teachings and raises awareness among non-Tibetans of the political situation in Tibet through its high-quality performances.

Arts and cultural organizations embedded in very poor communities often struggle with finances and space—their constituents cannot afford to contribute and/or pay much for services. Leaders of these organizations may also be asked to solve problems outside their arts and cultural expertise, such as

dealing with neighborhood violence, immigration issues, or health challenges of participants. Such demands, though often met, place an extra burden on their operations.

In one case we studied, community embeddedness has created a question as to whether nonprofit, for-profit, or informal organization structure best suits the mission. A prime example of a smaller organization that could easily be incorporated as a nonprofit but has chosen to remain a for-profit partnership is Eso Won Bookstore (see inset next page), which made its decision based on solidarity with other local African American business owners.

Whether organizations are embedded in their communities—and if so, how that affects their missions and structure—are important issues in an arts and cultural ecology. All nonprofit organizations, even universities that once were relatively remote from their

surrounding communities, have increasingly faced this reality. The links forged between arts and cultural organizations and the places in which they operate are particularly complex, since local communities are often marked deeply by their cultural identities and practices. We hope that our exploratory data analysis on place-based arts and cultural organizational determinants provides an initial fleshing out of some of the variations across communities. Better survey data would greatly improve our understanding of the issue.

The findings from our qualitative work confirm the plausibility of our hypothesis that features such as organizational dynamics, governance, space needs, interorganizational relationships, and community embeddedness may vary by organizational size and focus. The results suggest exciting frontiers for future arts and cultural ecological work, which we explore next, in our conclusion.

NURTURING COMMUNITY YOUTH VIA VEHICLE ART AND PERFORMANCE: LOS VIEJITOS CAR CLUB AND THE ORIGINAL SCRAPER BIKES

Even where resources are extremely limited, community leaders can use the arts to engage youth and give them an alternative to gangs and drugs. Los Viejitos in East Los Angeles and the Original Scrapper Bikes in Oakland use cars and bicycles respectively as art objects that are individually created and widely exhibited in their communities.

Los Viejitos Car Club's Mexican and Latino members create and maintain mobile art pieces—including lowriders—that the club can exhibit anywhere. Club leaders recruit youths who have left a violent life behind, while getting to know the entire families of potential members. Each car, invested in by the members, may take years to become a mobile art piece and is likely to be worth \$40,000 to \$50,000 when finished. Homes and garages become shared spaces where owners stop by to work together, ask questions, and share stories. Throughout the year and especially in the summers, members parade their cars through the streets, often as part of festivals that involve live music, especially oldies and Mexican.

Now nearly two decades old, Los Viejitos' positive impact is evident in the numbers of youth between 16 and 18 years old who grow up, leave gangs, and buy a car to start fixing it up. Car shows underscore this process—participants parade not only “super clean” cars but also “project cars” that may be rusty or just coated with primer, demonstrating the artistic process of creating the car. The shows provide intergenerational exchange and a space for families and men of color to use and exhibit their creativity.

Blossoming in East Oakland's heavily African American low-income neighborhoods, the Original Scrapper Bikes helps elementary and high school boys learn to build, fix, and make beautiful art pieces of their bicycles using materials such as aluminum, foil, foil tape, and spray paint. Members must maintain a 3.0 GPA, create a bike that is “amazing” and “best bike you've ever made,” and participate in single-file rides through neighborhoods, at block parties, and at community gatherings.

While painting and working on bikes in their public workspace, an East Oakland park, scrapper bikers discuss life issues, get their minds off goings-on in the street, and feel like they are part of something important. Scrapper biking also became a YouTube phenomenon after its founder, Tyrone Stevenson, posted a video of his bike to an amazing response. The bikers use YouTube, Twitter, Myspace, and Facebook to transmit music, fix-it videos, interviews, and events, documenting the evolution of the art form and reaching other youth who are in the process of fixing their bikes. They dream of a bike shop—complete with Apple computers—in East Oakland, where kids can come together in a positive and safe environment.

—Carolina Sarmiento

THE FUZZY LINE ALONG THE FOR-PROFIT AND NONPROFIT BORDER: ESO WON BOOKSTORE

Eso Won Bookstore is a fixture in Los Angeles' Crenshaw district, anchored in a three-block stretch of Degnan Boulevard lined with galleries full of African and Afrocentric art and restaurants that serve jerk chicken and jambalaya. The neighborhood feels simultaneously dynamic and a bit down on its luck: one out of every three storefronts is empty. The premiere black bookstore in Southern California, Eso Won is not a nonprofit, but given its services to the community, it could be.

Incorporated since 1990, Eso Won's 3,200 square feet of space includes storerooms, an office, and a bright showroom. The wheeled bookshelves are often pushed aside and folding chairs are set up for public events like readings and concerts. Since 1991, Eso Won has hosted a dazzling array of writers, some well-known and others less so. Muhammad Ali, Maya Angelou, Walter Mosley, Michael Eric Dyson, Cornel West, Bill Cosby, Terry McMillan, Berry Gordy, Ossie Davis and Ruby Dee, Octavia Butler, and Toni Morrison have all read there, as have Tom Hayden, Bill Clinton, and Barack Obama. Readings drawing large crowds are held off-site at nearby Compton College or local Christian churches.

Eso Won's owners, James Fugate and Tom Hamilton, take their role as a neighborhood-based Afrocentric business seriously. They considered transforming the business into a nonprofit organization, but out of solidarity with neighboring black retailers, decided against it. They believe with their colleagues that local businesses empower their community. Still, Eso Won struggles for a foothold in a rapidly changing landscape of superstores and Internet booksellers who now duplicate their offerings. As recently as 2004, Eso Won's annual revenue ran to \$1 million, but more recently topped out at \$500,000. In 2007, the business almost closed down, but loyal customers created an email campaign that saved the shop.

—Deborah Wong

SECTION NINE

Toward an Amplified Arts and Cultural Ecology

California's nonprofit arts and cultural ecology creates and shares works, performances, and meanings through a synergetic system of people and organizations, across regions and rooted in communities, together generating intrinsic and economic value for the state's residents and visitors. In this study, we have conceptualized this ecology, placing it within the larger world of for-profit, public sector, and informal arts and culture, in which the nonprofit sector plays a key seedbed and delivery role. We have explored many dimensions of this nonprofit ecology, emphasizing the relationships among organizations, people and places.

New data sources and analytical tools have bolstered our ability to document the breadth and depth of California's nonprofit arts and cultural activity and its benefits for the people of the state: the California Cultural Data Project (CDP), the National Center for Charitable Statistics (NCCS), the Survey of Public Participation in the Arts (SPPA), the American Community Survey (ACS), and Impact Analysis for Planning (IMPLAN). The CDP and ACS data sources have come online only in the last few years. We combine the strengths of the CDP and NCCS to develop a portrait of California organizations, while using the SPPA and ACS to explore the dimensions of people and place. IMPLAN data enable us to chart economic impacts. Together, these sources make it possible to highlight connections between organizations and people, organizations and place, and all three arenas at once.

New ground explored

California, given its physical size and environmental diversity, multiethnic and dispersed population, and huge portfolio of arts and cultural organizations, is a marvelous laboratory for a pioneering effort to analyze the nonprofit arts and cultural ecology. What have we found that's new?

Intrinsic benefits

With CDP data benchmarked to NCCS data, we document the delivery of California nonprofits' collective public-service mission. For instance, California's nonprofits produce and present an amazing 277,000 performances and commission 41,000 new works of art, drama, music, and literature annually. They provide 167,000 educational classes and workshops for the public. And 62% of the time, the people attending their offerings pay nothing.

Participation

With CDP and SPPA data, we draw a vibrant picture of how Californians participate in arts and culture, probing the intersection of organizations with people. For instance, people attend the offerings of California nonprofit arts and cultural organizations an estimated 137 million times annually. Californians' 2008 participation rates were markedly higher (52%) than those in the rest of the U.S. (46%).

Workers, volunteers, contributors

To study another interface between organizations and people, we use CDP and NCCS data to estimate that California nonprofits pay 137,000 people for work annually, the majority of them artists, most of whom work less than full time or on contract. For every paid worker, four more people work as volunteers, a great tribute to the value of arts and culture and a feature that distinguishes the sector from its for-profit or public sector counterparts. Another demonstration of how committed people are to arts and cultural endeavors is the fact that California nonprofits reported 2.2 million contributors annually.

Organizational size, focus, and location

To explore the interface between organizations and place, we use CDP, NCCS, and ACS data to show how nonprofits' presence, size, and focus map by region and how the features of cities help to explain this resulting mosaic. For instance, Los Angeles supports more larger arts and cultural organizations than any other region, while the San Francisco Bay Area hosts higher numbers of arts organizations per capita than other populous regions. The thinly populated Sierras and the North Coast and North State regions host the highest numbers of arts organizations per capita. By focus area, Central Coast nonprofits specialize more in music while the North Coast and North State regions specialize more in media and visual arts. Place features such as job density and public plus private arts funding complement the educational attainment and personal wealth of individuals as strong correlates of arts organizational presence.

Economic impact

With IMPLAN, CDP, and NCCS data, we are able to estimate nonprofit arts and cultural organizations' impact both on people (through employment and earnings) and on place. For instance, statewide, these organizations generate \$8.5 billion in sales, \$3.6 billion in labor income, and 71,000 FTE jobs paying an average of \$50,000. They pay revenues of \$283 million to California state and local governments and \$355 million to the federal government. Within the state, the Los Angeles area and Bay Area account for high shares of arts-related jobs, income and taxes generated, yet the Northern California and Sierras region supports nearly 1,700 FTE jobs, \$60 million in labor income, \$146 million in total output, and \$4 million in California state and local taxes.

What's next?

California's arts and cultural providers, participants, and advocates can use the ecological framework and the evidence assembled here to inform themselves, policymakers, politicians, and the general public about

the extraordinary character and performance of the nonprofit arts and cultural sector. In general, arts and cultural protagonists have not presented as convincing a portrait of the sector's breadth, complexity, innovation, and impact as have sectors like medicine, science, and engineering. Arts advocates often fall back on economic impacts as a pitch for public funding, where other fields have underscored their intrinsic contributions (health, innovation, infrastructure). One reason may be that arts and cultural subsectors—for-profit, nonprofit, public, and informal—tend to operate in their own arenas, competing with each other for scarce resources. An ecological framework helps us to see this critical sphere of our society holistically.

Much more work needs to be done to articulate this ecology, its evolution over time, and connections among organizations and actors within it. Nonprofit arts and cultural organizations are the natural leaders of such an effort, since commercial cultural industry firms are preoccupied with markets and profits, the public sector is currently beleaguered with budget deficits, and the informal sector, while large, is relatively disorganized and resource-poor. What follows are three areas that form an axis along which this project might reasonably be advanced in this decade.

Interorganizational networks and relationships

First, our appreciation for the connections between nonprofit arts and cultural organizations and nonprofits in other fields (especially higher education and K–12 schools) and for-profit cultural industries and entrepreneurs could be greatly expanded. Many arts organizations are born from or nurtured by existing ones. They also share resources and space, and often launch artists and administrators who go on to provide creativity and staffing for other organizations. Many organizations mentor each other and share their insights into what works in their particular disciplines and markets, even as they simultaneously compete with each other for resources and participants. Some straddle the border between

for-profit and nonprofit or between informal and nonprofit. Some have taken over functions from schools that have cut back on arts funding. Some work with partners in the commercial sector.

These networks and relationships should be made more visible, something that surveys and qualitative research can help us with. Our qualitative data illuminates many of these relationships, and most of the features we document are as germane to larger arts organizations as the small ones we interviewed. Our data analysis does shed some light on connections within sectors. For instance, our economic impact data documents the sales and employment consequences of nonprofit arts and cultural activity for chiefly commercial sector firms in business, finance, and accommodation, while it also shows the public sector benefits in terms of tax revenues generated. In our initial exploration of the distribution of artists among public, nonprofit, and for-profit employers, we were able to show the relative importance of each sector as primary employer for artists. Similarly, survey data mentioned in our study charts how artists simultaneously work in commercial, not-for-profit, and informal sectors (Markusen, Gilmore, et al., 2006). But much of the future work will have to be done with qualitative methods that tie more of these elements together.

Change over time

Second, we know little very about how nonprofit arts and cultural ecologies change over time. In this study, we were able to use SPPA data to show how Californian's arts participation ratios fell from 2002 to 2008 but more slowly than nationally. As more years of CDP and ACS data are generated, we will be able to study change in offerings and outcomes, size and location, employment and tax revenue impacts, and community features associated with these factors that in this study we've only been able to present at one given point in time. Non-CDP survey data has been collected and used for almost two decades in the Seattle area, permitting detailed nonprofit arts impact profiles for four periods from 1993 to 2010 (Beyers and GMC Research Corporation, 2011).

Improvements in existing data sources and methods

Finally, existing data sources could be better than they are. Our appendix details how researchers and arts advocates can work with what's at hand. The challenges we document suggest ways that each data source can be improved over time to amplify our understanding of arts and cultural ecology and our ability to generate useful research results. Also, much hard work remains to be done in making these data sources comparable, as our caveats about comparing the CDP and SPPA participation data demonstrate. In addition, some key features of arts and cultural organizations are poorly covered in existing databases: variations in governance structure, access to and use of dedicated space, the origins of visitors to California's offerings, and to what extent Californians participate outside of the state, to name a few.

There are other promising data sources that we have not explored. For instance, the cultural vitality indices developed by the Urban Institute and computed for a number of American cities (Jackson et al., 2006) offer ways of exploring in greater depth how community features interact with nonprofit arts and cultural organizations' offerings and the results of those interactions. We also hope that new data sources will come online to help flesh out the ecological whole. An example is the emerging Strategic National Arts Alumni Project, which surveys arts school and conservatory graduates and includes, among other factors, where arts graduates study, where they end up working, and for whom.

We hope that arts and cultural advocates, organizational leaders, funders, public managers, politicians, educational leaders, community activists, private sector cultural industry executives, artists and cultural workers, and researchers will all find something fascinating and motivating in this study of California's nonprofit arts and cultural ecology. We anticipate that in 20 years, we will all know much more about how the state's arts and cultural nonprofit sector works and how its constituents collaborate with other types of organizations, with people, and with communities.

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Endnotes

- ¹ The notion of an arts and cultural ecology has been advanced by two remarkable visualization efforts: Kreidler and Eng's *Cultural Dynamics Map: Exploring the Arts Ecosystem in the United States* (2005) and two Seattle music industry studies by Beyers et al. (2004, 2008).
- ² Ann Markusen and Anne Gadwa, 2010, based on DeNatale and Wassall, 2007, p. 5. Used with permission.
- ³ Gray and Heilbrun, 2000.
- ⁴ Data are from the 2007–09 ACS Multi-Year Estimates—tables provided on the U.S. Census Bureau's website at www.census.gov. For more information on the ACS data, see section I.D in the Technical Appendix. These totals for all sectors do not include people doing creative work as a second job or the many amateurs who do not expect to make income but devote substantial portions of their time to art and cultural work and share it beyond their families and close friends. They also do not include suppliers and repairers of arts equipment, educators, producers, venue providers, editors, publishers, and distributors who make it possible for the creative ideas and expressions of a single artist to come to fruition. See Howard S. Becker's *Art Worlds* (2008), for a depiction of the complexity and richness of these relationships.
- ⁵ Markusen, Gilmore, et al., 2006: Table A1.
- ⁶ Estimates based on NCCS data restricted by NTEE codes and adjusted to correct for defunct organizations. See the "Data Preparation" section of the Technical Appendix for methodology.
- ⁷ For a discussion of the construction of the budget-size indicator variable and rationale for category "breaks," see the "Construction of Key Indicator Variables: Budget Size" section of the Technical Appendix.
- ⁸ From a sample of CDP organizations weighted to the NCCS by budget size and focus area (N=1,032; 157 missing). A majority of component cells in the under \$25,000 budget size category do not meet weighting reliability threshold. See the "Weighting Design" section of the Technical Appendix for methodology.
- ⁹ The activities of arts and cultural support organizations may often be dedicated to particular disciplinary foci or even individual organizations, but their major function is to support arts and cultural indirectly through services to producing and presenting organizations, artists, schools, and the arts-engaged public at large through research, funding, and advocacy.
- ¹⁰ Estimates based on activity and attendance figures reported by CDP organizations from fiscal years ending in 2007, 2008, and 2009, weighted against NCCS organizations by budget size and organizational focus. See the "Weighting Design" section of the Technical Appendix for methodology.
- ¹¹ See the Brown, Novak, and Kitchener (2008) study of arts participation in California's inland regions. A California Cultural Census (5,000 people) in the rapidly growing and heavily Hispanic San Joaquin Valley and Inland Empire regions that account for 22% of the state's population found very high levels of interest in cultural heritage among ethnic and racial groups (Rosenstein, 2005). Among respondents of all races and ethnicities, the census found significant engagement in creative activity—playing musical instruments (40%) and photography (52%)—and many are very likely to dance at home.
- ¹² For this analysis, we used data from the Survey on Public Participation in the Arts, a survey of 17,000 to 18,000 adults conducted periodically by the U.S. Census Bureau as part of the Current Population Survey. We employed data from the 2002 and 2008 SPPA.

- ¹³ This exercise, using the national SPPA data, involved a logistic regression of the likelihood of arts participation in 2008 for California adults compared to adults in the rest of the U.S., for each respondent's age, family income, race/ethnicity, sex, education level, and metropolitan status (whether the individual lived in a metropolitan area). Our finding that Californians are more likely to participate after controlling for these factors is statistically significant at the 95% confidence level.
- ¹⁴ Because of small sample sizes, the confidence intervals for regional estimates of participation rates are fairly wide; we report the intervals in the appendix.
- ¹⁵ Participation in the NEA SPPA data is based on a survey of California residents and thus includes their arts participation outside of California. Still, it is unlikely that Bay Area residents would travel more frequently to participate outside of the state than would residents of other large California metro regions.
- ¹⁶ Research has found that many people migrate between regions for quality of life reasons, not just economic opportunities. Artists in particular are more likely to migrate across state lines than people in most other occupations. Census net migration data show that in 2000, the Bay Area's ratio of incoming artists to all artists was higher than for any other large U.S. metro. Its rate of net artist in-migration for 1995–2000 (1.37) was exceeded only by that of Los Angeles (2.16), where commercial sector opportunities are a more powerful draw (Markusen and Schrock, 2006: Table 4).
- ¹⁷ Estimates based on contributor figures reported by CDP organizations from fiscal years ending in 2007, 2008, and 2009, weighted against NCCS organizations by budget size and organizational focus. See the "Weighting Design" section of the Technical Appendix for methodology.
- ¹⁸ For regional composition by county, see the "Construction of Key Indicator Variables: Region" section of the Technical Appendix. In some cases, as for the economic impact analysis, we had to aggregate the ten regions into seven—shown in the appendix, Figure A2.
- ¹⁹ Markusen, Gilmore, et al., 2006, found very high concentrations of artists in the Los Angeles and Bay areas.
- ²⁰ A census-designated principal city of a metropolitan or "micropolitan" statistical area is the largest place and, in some areas, one or more additional places that meet official standards regarding size and employment patterns.
- ²¹ Nearly three-quarters of arts organizations (73%) are found in the top 40% of cities, measured by the cities' jobs-to-population ratios. The 20% of cities with the highest residential densities (housing units per square mile) account for 41% of all arts organizations in the state, while the least dense 20% of cities account for only 8%. See the Technical Appendix for a full description of these data measures and their limitations.
- ²² The lowest 40% of cities, measured by the share of residents with a B.A. degree or higher, host only 15% of arts organizations.
- ²³ The 40% of California cities with the highest percent foreign-born host more than half (52%) of arts organizations.
- ²⁴ The regressions are based on analysis of cities with populations of 20,000 or more. See the "City Characteristic Data Source," and "Analysis by City Characteristics" sections of the Technical Appendix for data limitations, methodology, and variable definitions.
- ²⁵ Estimates based on activity and attendance figures reported by CDP organizations from fiscal years ending in 2007, 2008, and 2009, weighted against NCCS organizations by budget size and organizational focus. See the "Weighting Design" section of the Technical Appendix for methodology. Readers should keep in mind that attendees in these figures include people from outside the state.

²⁶ Arts nonprofit economic impact studies of California have been conducted before, but without the availability of CDP data used here. The California Arts Council's 2004 study, also using the IMPLAN model, used a narrower definition of arts and cultural activity but did include data on patron spending (Mataraza, 2004). It found total employment generated by arts and cultural nonprofit activity to be 40,000 compared with 71,000 in the current study. An Orange County report on the economic impacts of a limited number of arts and cultural organizations found much smaller impacts than estimated in the current study (Anderson and Orange County Business Committee for the Arts, 2010).

The recent Otis reports on the economic impacts of the creative industries in Los Angeles and Orange counties find much larger impacts but do not isolate nonprofit arts and cultural organizations from a larger cultural sector that includes cultural for-profits (Los Angeles County Economic Development Commission, 2010).

²⁷ The economic impact of arts and cultural organizations in California was estimated using the IMPLAN system of input-output impact models with Cultural Data Project and NCCS data. The CDP provided estimates of expenditures made for goods and services, as well as direct labor expenditures and levels of employment. See the appendix for further information.

²⁸ Variations in employment totals in Table 7 and Table 15 are the result of excluding interns and apprentices from Table 7 tallies.

²⁹ A location quotient (LQ) shows the share of nonprofit arts-related employment in the region divided by the state's share of arts-related employment. A LQ greater than 1.0 means that the region benefits from a larger share of its total employment attributable to nonprofit arts activity than does the state.

³⁰ Excellent qualitative studies have been done of participatory, informal, and unincorporated arts organizations, among the best of which are Alvarez (2005), Borrup and Wagner (2007), Jackson et al. (2003, 2006), Wali et al. (2002), Walker et al. (2003a, 2003b). Our discussion and methodology here draws on these studies.

³¹ The organizations were chosen to reflect the regional distribution of California organizations from the NCCS and CDP. Since the CDP only thinly covered smaller organizations and those focusing on ethnic, folk arts, multidisciplinary, heritage, and humanities, our cases oversampled from these groups. See the appendix for a fuller explanation.

³² See, for example, the cases of artists' centers in Markusen and Johnson (2006).