Pandemic Relief & Recovery

Emergency Funding & the Bay Area Arts Community

By Kelly Varian & Marc Vogl

VOGL CONSULTING
A note from the authors

The Pandemic Relief & Recovery report provides an analysis of the COVID-19 relief support grantmakers provided to Bay Area artists and cultural organizations, how it helped mitigate the crisis, and what the regional arts community needs now to recover.

Through multiple research methodologies, we aspired to be both broad and deep in our investigation. However, our report does not purport to offer a comprehensive list of all relief funds created or a complete review of the arts community’s diverse pandemic experience.

The Pandemic Relief & Recovery report concludes by affirming what readers may already know: relief funds for artists and arts organizations are winding down, but the Bay Area arts community will need recovery funds for years to come.

We hope this research inspires conversations that lead to sustained pandemic recovery support and evolved grantmaking practices that reflect the insightful feedback provided by the 250+ artists and cultural workers who contributed to this study.
This report was commissioned by:

And includes perspectives from 250+ Bay Area artists and cultural workers
Methodology

1. Scan of COVID-19 relief funds for Alameda, Contra Costa, and San Francisco
   - COVID-19 relief resources from arts service organizations and artist associations
   - Grant data from Candid’s Foundation Center Online Grant Directory
   - Datasets shared by funders
   - 200+ grantmaker websites

2. Conversations with 11 field experts & arts community leaders

3. Interviews with 14 individual artists

4. Survey of 223 small and mid-size budget arts organizations
Overview of 223 arts organizations surveyed

Organization County

- 59% San Francisco
- 31% Alameda
- 5% Contra Costa
- 5% other

Organization Age

- 62% >20 years
- 17% 11-20 years
- 12% 6-8 years
- 9% 2-5 years
- 0% <2 years

Organization Budget Size

- < $200K: 33%
- $200K - $499K: 24%
- $500 - $999K: 14%
- $1M - $2M: 17%
- > $2M: 11%

Organization Primary Discipline

- Literary: 4%
- Film/Media: 6%
- Theatre: 14%
- Visual Arts: 14%
- Dance: 19%
- Music: 19%
- Multidisciplinary: 24%

43% identify as BIPOC-led

Or have a combined senior leadership (as defined by the organization) and Board of Directors in which 50% or more identify as Black, Indigenous, or People of Color.

- 38% primarily serve BIPOC audiences and participants
- 37% have a mission explicitly rooted in creating, presenting, interpreting art by BIPOC artists
- 36% primarily serve a marginalized community other than the BIPOC community
Response

5 things you need to know about the COVID-19 Relief Funding Landscape

Section 1 of 4
1. Grantmakers created over 140 relief funds for artists and organizations

20 still active and deemed locally significant as of July 1

- 60% of funds closed
- 51% not mentioned by experts or survey participants
- 22% not explicitly emergency relief grants
2. Government programs and flexible support from local funders were critical

**Federal Government Programs**
- For organizations: Paycheck Protection Program
- For individuals: Unemployment Benefits & Stimulus Checks

**Flexible Support from Local Foundations**
- For organizations: Emergency Relief Grants
- For organizations: Non-Emergency Grants Converted to Gen Op
3. Increased acknowledgement of BIPOC need

115 Relief Funds By BIPOC Priority

- 59% don’t specify
- 22% BIPOC only
- 19% BIPOC priority
4. Overwhelming number of funds and scattershot communication

“Funds were quickly gone and highly competitive. And it was a job within itself to apply and keep up with who turned you down.”

– Arts organization representative
5. Geographic disparity with Contra Costa trailing

Per capita, San Francisco received 10x more grants than Contra Costa.

<table>
<thead>
<tr>
<th>County</th>
<th>Three-County Population by County</th>
<th>Grants Awarded</th>
</tr>
</thead>
<tbody>
<tr>
<td>San Francisco</td>
<td>24%</td>
<td>53%</td>
</tr>
<tr>
<td>Contra Costa</td>
<td>31%</td>
<td>7%</td>
</tr>
<tr>
<td>Alameda</td>
<td>45%</td>
<td>40%</td>
</tr>
</tbody>
</table>
Resilience

6 things you need to know about

How the Arts Community Fared

Section 2 of 4
6 Observations of Arts Community Resilience

1. Despite substantial challenges, the arts community is on the path to recovery

215 Arts Organizations Subjective Assessment of Where They Are on the Path to Recovery
6 Observations of Arts Community Resilience

2. Fundraising and cost cutting to offset earned income losses

How Income Streams Changed for 199 Arts Organizations Over the Course of the Pandemic

<table>
<thead>
<tr>
<th>Income Stream</th>
<th>% of orgs. with Increase</th>
<th>% of orgs. with Decrease</th>
<th>% of Organizations No Change or NA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Government Grants &amp; Loans</td>
<td>47%</td>
<td>21%</td>
<td>32%</td>
</tr>
<tr>
<td>Individual &amp; Board Donations</td>
<td>39%</td>
<td>35%</td>
<td>26%</td>
</tr>
<tr>
<td>Foundation Grants</td>
<td>33%</td>
<td>38%</td>
<td>29%</td>
</tr>
<tr>
<td>In-Kind Contributions</td>
<td>13%</td>
<td>33%</td>
<td>54%</td>
</tr>
<tr>
<td>Corporate Giving</td>
<td>9%</td>
<td>38%</td>
<td>53%</td>
</tr>
<tr>
<td>Earned Income</td>
<td>6%</td>
<td>79%</td>
<td>15%</td>
</tr>
</tbody>
</table>
3. New costs to adapt to a changing operating environment

**Principal Ongoing COVID-19 related Expenses For Arts Organizations**

- Online content development, recording, & streaming
- Remote work technology & accommodations
- Sanitizing supplies & services
- Facility Modifications (HEPA filters, etc.)
- Personal protective equipment (masks, etc.)
- Other
4. Shrinking cash reserves and personal savings

“I want to be a full-time artist and I was saving to do that, but I was laid off in February 2020 and I completely depleted my savings. I used up what I called my Freedom Fund.”

– Artist

Our survey of 223 arts organizations found:

- Operating reserves shrank for 41% of organizations
- 54% of organizations had ≤ 3 months of operating reserves
5. Burnout makes ‘getting back to normal’ challenging

“I filed for bankruptcy because of the loss of revenue from my photography business... 2020 was the hardest year of my life.”
– Artist

“Some artists are really hurting still and can't just go and get as many gigs as possible as quick as possible. We are not machines.”
– Artist
6. Different experiences for BIPOC-led and white-led organizations

<table>
<thead>
<tr>
<th>% of Organizations...</th>
<th>BIPOC-Led</th>
<th>White-Led</th>
</tr>
</thead>
<tbody>
<tr>
<td>With $2M+ budget</td>
<td>5%</td>
<td>17%</td>
</tr>
<tr>
<td>With more than three months of operating expenses</td>
<td>41%</td>
<td>47%</td>
</tr>
<tr>
<td>That experienced a significant decline in individual and board donations</td>
<td>23%</td>
<td>9%</td>
</tr>
</tbody>
</table>
6. Different experiences for BIPOC-led and white-led organizations

<table>
<thead>
<tr>
<th>% of organizations that said _____ was one of their most significant barriers</th>
<th>BIPOC-Led</th>
<th>White-Led</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lack of connections to the philanthropic community</td>
<td>50%</td>
<td>17%</td>
</tr>
<tr>
<td>Explicit or implicit racial bias from funders</td>
<td>42%</td>
<td>15%</td>
</tr>
<tr>
<td>Not knowing what funds are available</td>
<td>30%</td>
<td>7%</td>
</tr>
<tr>
<td>Difficulty reaching or building rapport with funders</td>
<td>44%</td>
<td>22%</td>
</tr>
</tbody>
</table>
6. Different experiences for BIPOC-led and white-led organizations

<table>
<thead>
<tr>
<th>Areas Were BIPOC-led Organizations May Have Fared Better</th>
<th>BIPOC-Led</th>
<th>White-Led</th>
</tr>
</thead>
<tbody>
<tr>
<td>Received increased foundation grants</td>
<td>32%</td>
<td>19%</td>
</tr>
<tr>
<td>Ended the year with a surplus or balanced budget</td>
<td>71%</td>
<td>68%</td>
</tr>
</tbody>
</table>
6. Different experiences for BIPOC-led and white-led organizations

<table>
<thead>
<tr>
<th>Qualities That Make Relief Funds Accessible &amp; Impactful for BIPOC-led Organizations</th>
<th>BIPOC-Led</th>
<th>White-Led</th>
</tr>
</thead>
<tbody>
<tr>
<td>% of organizations that said _____ is most important for their organization</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Funds designated for BIPOC-led or serving organizations</td>
<td>53%</td>
<td>7%</td>
</tr>
<tr>
<td>Explicit policies to reduce racial bias</td>
<td>46%</td>
<td>17%</td>
</tr>
<tr>
<td>Multiyear support</td>
<td>56%</td>
<td>29%</td>
</tr>
<tr>
<td>Technical assistance</td>
<td>56%</td>
<td>39%</td>
</tr>
</tbody>
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Needs

4 things you need to know about Needs and Barriers to Overcome

Section 3 of 4
1. Relief funding is going away, yet recovery could take years

“In the spring, knowing we made it through pandemic, I felt triumphant... But now I am realizing that the relief grants that are floating our boat just won’t last, and it feels draining.”

– Arts organization representative
## 2. Flexible sustained income needed to survive and adapt

<table>
<thead>
<tr>
<th>Top Needs</th>
<th>Percent of Organizations</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Obtaining Flexible, Sustained Funding</strong></td>
<td>39%</td>
</tr>
<tr>
<td>Supporting and Hiring Staff</td>
<td>14%</td>
</tr>
<tr>
<td>Rebuilding Audiences &amp; Participants</td>
<td>9%</td>
</tr>
<tr>
<td>Accessing &amp; Securing Space</td>
<td>8%</td>
</tr>
<tr>
<td>Adapting to Virtual/In-Person Hybrid Work &amp; Using Digital Technology</td>
<td>7%</td>
</tr>
<tr>
<td>Clear Public Health Guidance</td>
<td>5%</td>
</tr>
<tr>
<td>Strategy &amp; Contingency Planning Support</td>
<td>5%</td>
</tr>
<tr>
<td>COVID-19 Safety Equipment &amp; Facility Modifications</td>
<td>4%</td>
</tr>
</tbody>
</table>

*Most Significant Immediate Needs of 223 Bay Area Small-Budget Arts Organizations Surveyed*
3. Top barriers to accessing relief funds

![Bar chart showing the percent of organizations facing various barriers to accessing relief funds.](chart.png)

- Eligibility limitations: 40% (Most Significant) 60% (Barrier)
- Burdensome applications: 40% (Most Significant) 60% (Barrier)
- Difficulty reaching & building rapport with funders: 40% (Most Significant) 60% (Barrier)

Most Significant Barrier
Barrier
4. Most important relief fund qualities
1. Tons of funds
2. Impactful government programs and local private funds
3. Acknowledgement of BIPOC need
4. Scattershot communication
5. Geographic disparity

1. Arts community on the path to recovery
2. Offsetting drastic earned income losses
3. New pandemic expenses
4. Shrinking cash reserves
5. Burnout
6. Different experiences for BIPOC-led and White-led groups

1. Recovery could take years
2. Flexible, sustained funding needed
3. Top barriers to funding:
   a. Eligibility limitations
   b. Burdensome applications
   c. No rapport with funders
4. Top qualities of accessible, impactful funds:
   a. Unrestricted funds
   b. Easy applications
   c. Large grants
   d. Clear information
6 Recommendations to Funders

Recommendations Summary

<table>
<thead>
<tr>
<th>Types of Support Needed</th>
<th>Consequential, Unrestricted, Multi-Year</th>
<th>Targeted “Start-Back” Grants &amp; Technical Support</th>
<th>BIPOC &amp; Contra Costa County Designated Funds</th>
</tr>
</thead>
<tbody>
<tr>
<td>Evolved Grantmaking Practices</td>
<td>Increased Grantmaker Collaboration</td>
<td>Simplified Applications and Reports</td>
<td>More Outreach and Transparency</td>
</tr>
</tbody>
</table>
Read the report
bit.ly/PandemicReliefReport

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