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For the full data sets summarized in this document, please see this Google sheet.
The rapid spread of COVID-19 has created a global health and economic crisis that is testing every one of us. The shocks of this “new normal” are severe and unanticipated for nonprofit organizations across the country. Pittsburgh-area funders recognize the need to act with fierce urgency to support their nonprofit partners as well as the people and communities hit hardest by the impacts of COVID-19. As leaders of local philanthropies, they believe that the arts have always played an essential role that is sometimes overlooked during moments of crisis.

In partnership with the Greater Pittsburgh Arts Council, a group of local funders conducted a COVID-19 Impact Survey for Arts Organizations to better understand how Southwestern Pennsylvania's nonprofit arts and culture community has been affected and build a response that addresses both short-term and long-term needs.

The survey was distributed on Friday, March 27, 2020 to 204 arts and culture organizations across Southwestern Pennsylvania. The organizations’ responses were due on Friday, April 3, 2020.

The survey had respondents from 103 organizations. Their responses are actively being cleaned and analyzed. This brief report features some of the initial findings tied to:

1. Organization Characteristics: Type and Fiscal Year
2. Actions Taken due to COVID-19
3. Urgency of Need/for Assistance due to COVID-19
4. Ranking of Helpful Actions on Behalf of Funders and Foundations
5. Changes in Revenue and Costs
1. Survey Respondents by Organization Type

Organizations were asked to self-identify into one of the NEA’s Disciplines. Results were recorded in 14 of the 16 disciplines.

As we continue to analyze our data, there are opportunities to segment by discipline to better understand the nuances of need in the Pittsburgh community. Moving forward, in the hopes of achieving statistical significance, it may be beneficial to the analysis to lean on GPAC’s taxonomy for organizations.
Approximately 41% of organizations have a Fiscal Year that runs from July 1-June 30. Approximately 36% of organizations have a Fiscal Year that runs from January 1-December 31. The remaining 23% reported other Fiscal Years. As we continue to conduct our analysis, it may be of interest to see whether or not this rhythm impacts projected losses in revenue and costs.
3. How has your organization’s programming been affected by COVID-19?

Approximately 84% of organizations indicated that they had to cancel performances, classes, exhibitions, etc. due to the spread of COVID-19 and social distancing measures recommended by the CDC. Nearly 68% of organizations responded that they had to close their facility and approximately 66% responded that they had to postpone their programming (production, season, etc.).

The visualization on the next page provides further insight into organizational response to mitigate these changes. These responses range from launching additional fundraising appeals to the cancellation of contracts to the unexpected use of financial reserves.
4. Has your organization responded, or does it anticipate responding in the next six months, to the impact of COVID-19 in any of the following ways?

<table>
<thead>
<tr>
<th>Action</th>
<th>Very Unlikely</th>
<th>Unlikely</th>
<th>Neither/Null</th>
<th>Likely</th>
<th>Very Likely</th>
<th>Avg. Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cancel artist contracts/engagements</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>3.9</td>
</tr>
<tr>
<td>Delay capital projects</td>
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<td></td>
<td></td>
<td></td>
<td>3.4</td>
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<tr>
<td>Extend line of credit</td>
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<td></td>
<td></td>
<td>2.7</td>
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<tr>
<td>Furlough staff</td>
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<td></td>
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<tr>
<td>Implement alternative forms of online programming</td>
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</tr>
<tr>
<td>Layoff staff</td>
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<td>2.7</td>
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<td>Make special appeal to funders (foundations, public, government)</td>
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<td></td>
<td></td>
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<tr>
<td>Postpone fundraising campaign</td>
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<td></td>
<td></td>
<td></td>
<td>3.3</td>
</tr>
<tr>
<td>Postpone subscription campaign</td>
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<td></td>
<td></td>
<td></td>
<td>2.9</td>
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<tr>
<td>Reduce staff salaries</td>
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<td>Reduce work hours or require staff to take unpaid time off</td>
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<td></td>
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<td>3.2</td>
</tr>
<tr>
<td>Refund tickets, subscriptions, and/or enrollment fees</td>
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<tr>
<td>Request donations in lieu of ticket refunds</td>
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<td>3.6</td>
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<tr>
<td>Tap existing line of credit</td>
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<tr>
<td>Utilize financial reserves</td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td>4.0</td>
</tr>
</tbody>
</table>
5. Loss of Revenue, Reduction in Costs, and Burn Rate

In spite of organizations’ rapid responses to mitigate financial challenges, the realized and potential losses of earned and contributed revenue are looming. Below are three box and whisker plots that display the reported values for A) anticipated losses in revenue through June 30th, B) anticipated reductions in costs through June 30th, and C) organizations’ anticipated monthly burn rates in light of COVID-19. As can be seen through the spread, larger organizations are skewing the average values away from the true middle of the reported data.

A. Anticipated Losses in Revenue
   - **Average:** $449,090
   - **Median:** $50,000

B. Anticipated Reductions in Costs
   - **Average:** $288,294
   - **Median:** $31,000

C. Anticipated Monthly Burn Rate
   - **Average:** $149,687
   - **Median:** $18,258
The following box and whisker plots show the same dimensions restricted to the lower 80% of the data. This accounts for 80th percentile outliers and visualizes impacts felt by a majority of responding organizations.

**D. Anticipated Loss in Revenue**

Excluding Outliers:
Up to $250,000 (80th Percentile)
- **Average:** $60,328
- **Median:** $35,500

**E. Anticipated Reductions in Costs**

Excluding Outliers:
Up To $150,000 (80th Percentile)
- **Average:** $37,500
- **Median:** $20,000

**F. Anticipated Monthly Burn Rate**

Excluding Outliers:
Up to $75,000 (80th Percentile)
- **Average:** $19,269
- **Median:** $13,211
6. When do you anticipate the most urgent need for assistance?

To prevent further losses, approximately 6% of respondents indicated that they would immediately need assistance. An additional 36% indicated that they would need assistance within the next 90 days. Approximately 57% (42% from the prior calculations) of respondents indicated that they would need assistance within the next 120 days.

In terms of what kind of assistance organizations are looking for, the visualization on the following page provides funders and sector leaders several places to start, especially in the realm of offering financial support (i.e., “new, one-time unrestricted grant support from current funders”, “ability to apply to a pooled grant emergency fund”, “ability to change current restricted grants to unrestricted operating support”, etc.).
7. How helpful would the following be for your organization to recover from the impact of COVID-19?

- A call-in “help desk” to address pressing issues
- Ability to apply to a pooled emergency grant fund
- Ability to change current restricted grants to unrestricted operating support
- Access to a below market rate or no-interest loan to meet current needs
- Access to financial, legal or human resource consultants
- Access to new technology hardware, training, and support for staff to work-from-home
- Access to new technology hardware, training, and support for virtual programming
- Additional marketing support
- Available fundraising support and/or technical assistance
- Community arts calendar to help with rescheduling
- Loan guarantee from funders
- Matching challenge grant to support fundraising appeals
- New, one-time unrestricted grant support from current funders
- Peer convenings with like organizations to share resources and best practices
- Public campaign about the value of the arts in time of community challenges
- Relief from grant reporting

Answer:
- The Most Helpful
- Very Helpful
- Neither Helpful Nor Unhelpful
- Somewhat Helpful
- Unhelpful

Number of Records

Avg. Score (Higher = More Helpful)
8. Next Steps

Further cleaning and analysis of the data will be undertaken by the GPAC staff. The survey, which was sent out to more than 200 arts organizations in Southwestern Pennsylvania, featured 27 questions, none of which were required. Nearly half of those questions encouraged open-ended responses. These responses will be coded for further analysis. Particularly insightful comments and responses will be shared anonymously in future reports.

To ensure that the report not only represents the diversity of arts disciplines within Pittsburgh but also the diversity of its residents, additional outreach may be conducted.

9. Acknowledgments

We appreciate the support and partnership of our colleagues in Pittsburgh’s foundation community during these uncharted times. We would also like to thank several members of our staff team.

Janet Sarbaugh, Vice President, Creativity Programs
Kate Sphar, Senior Program Officer, McCune Foundation
Kathy Buechel, Executive Director, The Benter Foundation

Mitch Swain, CEO, GPAC
Kristen Wishon, Director of Communications, GPAC
Kathleen Hill, Research, Policy, and Advocacy Intern, GPAC
Sarah Schreck, Marketing Assistant, GPAC
10. About The Greater Pittsburgh Arts Council

The Greater Pittsburgh Arts Council (GPAC) champions the arts in Southwestern Pennsylvania, providing financial, professional, and political support for the arts and culture sector. Comprised of more than 500 diverse artists and nonprofit organizations, GPAC offers valuable research, legal and business consulting, networking and professional development opportunities so that artists, as well as arts leaders and organizations, can grow their skills and advance their practice. GPAC provides grants for artists and arts organizations; leads the region’s arts advocacy at the local, state, and national level; and models best practices for accessibility and equity in the arts. Learn more at PittsburghArtsCouncil.org.

Questions about this report?

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