Organizations Participating in Portfolio
IF PENNSYLVANIA COULD ATTRACTION AN INDUSTRY THAT WOULD CREATE 62,000 JOBS ALL OVER THE COMMONWEALTH, PUMP $2 BILLION INTO OUR ECONOMY, GENERATE $283 MILLION IN TAX REVENUES, & EDUCATE OUR KIDS TO COMPETE IN THE 21ST CENTURY, WOULD WE GO AFTER IT?

We don't have to. It's already here. ARTS & CULTURE IT'S OUR INDUSTRY. IT'S HOW WE GROW.

I support Arts & Culture. Please join me. THANK YOU.

name
street
city, state, zip

Yes, I'd like to receive periodic issue/advertiser updates from the Greater Philadelphia Cultural Alliance. Let's grow together.

email
Sector Is Operating in the Red
Operating Margin: Unrestricted Revenue vs. Expenses, Excluding Investments

2007

+2%
Sector Is Operating in the Red
Operating Margin: Unrestricted Revenue vs. Expenses, Excluding Investments

2007: +2%
2009: -9%
Expenses Are Relatively Flat

- Communications: +8%
- Physical Plant: -1%
- Artistic/Programmatic Services: +1%
- Professional Services: +6%
- Salaries and Benefits: +8%

TOTAL: +4%
-19%

Contributed Income
Contributed Income 2009
(Revenues)

Corporate: -$12.1M
Government: -$10.1M
Foundation: -$40.1M

Break Even
Contributed Income 2009
(Revenues)

$23.6M

Individual

Corporate
-$12.1M

Government
-$10.1M

Foundation
-$40.1M

Break Even
-62%

Earned Income
Earned Income 2009

- Admissions: $19.3
- Special Events: -$29.5
- Investments/Interest: -$424.8M

Break Even
Total Endowment and Other Investment Values
2007-2009

2007: $2.3B
2009: $1.9B
Investments Compared to Market

Trailing average return for 12 month period ending in each given month.
Earned Income
Excluding Investments/Interest
-1%
Bucking the Trend

NEA Survey and 2011 Portfolio. Total Attendance converted to 100 point scale.
Bucking the Trend

NEA Survey and 2011 Portfolio. Total Attendance converted to 100 point scale.
Bucking the Trend

NEA Survey and 2011 Portfolio. Total Attendance converted to 100 point scale.
195,000
IN ONE DAY
Bucking the Trend

Attendance

5%
Bucking the Trend

Attendance: 5%
Membership & Subscriptions: 8%
Bucking the Trend

- Attendance: 5%
- Membership & Subscriptions: 8%
- Individual Giving: 20%
Categories of Revenue from Individuals

Increased $47 million

Total $339.1m

Admissions, Tickets, & Tuitions
Categories of Revenue from Individuals
Increased $47million

Total
$339.1m

2007

Memberships & Subscriptions
Admissions, Tickets, & Tuitions

2009
Categories of Revenue from Individuals
Increased $47million

<table>
<thead>
<tr>
<th>Category</th>
<th>2007</th>
<th>2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>$339.1m</td>
<td>$386.0m</td>
</tr>
<tr>
<td>Individual Contributions</td>
<td></td>
<td></td>
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<tr>
<td>Memberships &amp; Subscriptions</td>
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Total Employment at Portfolio organizations:
24,268 Positions
Inspirational AND Affordable
Admission Price 1/3 the Cost of Production

Median $15
Admission Price
Inspirational AND Affordable

Admission Price 1/3 the Cost of Production

Median Admission Price $15
Median cost of Production $48
Inspirational AND Affordable
52% of Admissions are Free
34,000 School Groups Visited Cultural Organizations
We Worked Harder and Smarter

-2% FTE Positions

+1% # of Events

Break Even
## Cuts to Administrators Deeper Than Cuts to Artistic and Programmatic Staff

<table>
<thead>
<tr>
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<td>-1%</td>
<td>Artist and Program</td>
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</table>
Cuts to Administrators Deeper Than Cuts to Artistic and Programmatic Staff

-1%  
Artist and Program

-4%  
Fundraising and General

Break Even
Sector’s Compensation Remained Low

<table>
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<tr>
<th>National averages for select industries*</th>
<th>Salary and commission as percentage of total expenses**</th>
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<td>Sports teams and clubs</td>
<td>59%</td>
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<td>Offices of lawyers</td>
<td>53%</td>
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<td>Advertising agencies</td>
<td>50%</td>
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<td>Architecture, engineering, and related services</td>
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<td>2011 Portfolio organizations</td>
<td>33%°°</td>
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Volunteer and Board Positions

- Paid Positions: 24,000
- Volunteers + Board: 38,000
Volunteers Were Essential

30% of all hours worked were donated.

Small orgs:
More than 50% of hours donated.
A Shift to Independent Contractors

More than 50% employed as independent contractors.

- Independent: 52%
- Full-time: 20%
- Part-time: 28%
Facilities-Related Expenses Declined 44%
Including Major Repairs

2007: $15.3M
2009: $8.5M
Continued Investment in Marketing

- 2007: 5.5%
- 2009: 5.5%
Shift to Online Marketing

- 2007: $869K
- 2009: $1.29M
Fundraising Campaigns 2007-2009

2007: 57 Capital Campaigns
2009: 47 Capital Campaigns
Fundraising Campaigns 2007-2009

Capital Campaigns

- 2007: 57
- 2009: 47

Endowment Campaigns

- 2007: 31
- 2009: 19
Engage Individuals
Engage Individuals

- Technology
Engage Individuals

- Technology
- Relationships
Engage Individuals

- Technology
- Relationships
- Personal Stories
Engage Individuals

• Technology
• Relationships
• Personal Stories
Love Thy Labor
Love Thy Labor

• External Forces
Love Thy Labor

• External Forces

• Bottom-up Planning
Move to New Models
Move to New Models

• Capitalization
Move to New Models

• Capitalization

• Strategic Alliances
Move to New Models

- Capitalization
- Strategic Alliances
- Funding
Arts & Culture.
It’s How We Grow.
The 2011 Portfolio was made possible by The Pew Charitable Trusts, PNC, and the William Penn Foundation. Additional support was provided by the Dolfinger-McMahon Foundation.