

Taking Your Fiscal Pulse—August 2009

A Budget Group Breakdown of Data from TCG Member Theatres

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As an up-to-the-minute complement to the annual Fiscal Survey, TCG launched a program in 2008 to capture theatres' most current state of affairs through *Taking Your Fiscal Pulse* snapshot surveys. In light of the economic crisis, these surveys have been particularly useful to the field in keeping current the communication about circumstances faced by many theatres. These surveys help managers to benchmark their theatre's condition relative to others' so that they, along with key stakeholders, can get a timely sense of how the field is maneuvering through this difficult time.

The *Taking Your Fiscal Pulse—August 2009* snapshot survey marked TCG's second collaboration with the Association of Performing Arts Service Organizations (APASO), the result of which was participation by over 465 not-for-profit theatres and a greater sense of the state of the national theatre field. The data provides the basis for a national report, *Taking Your Fiscal Pulse—August 2009: A Report on the Fiscal Health of the National Not-for-Profit Theatre*, published in October 2009.

As a companion to the national report, TCG is pleased to provide this compilation of responses from the 215 TCG member theatres that participated. The data is presented with a breakdown by budget size and is meant for informal use by TCG members. We provide data only for the theatres that responded to each question (the percentages are calculated leaving out the theatres that skipped the question). In the charts, there may be slight discrepancies in the totals due to rounding.

The survey was designed to be completed in 10 minutes or less with multiple choice questions, checklists and rating scales. The data reported on in this document was not verified against theatres' audits, as is the case with *Theatre Facts*. It is as accurate a snapshot of the field's fiscal health as is possible given the survey's design.

For more information on TCG's research efforts including the Snapshot Surveys, *Theatre Facts* and other projects, visit the [Tools & Research](#) section of the TCG website.

| Budget Group (annual expenses): | | | |
|---------------------------------|---------------------------|-----|---------|
| All | | 215 | 100.00% |
| Group 1 | \$50,000 - \$249,999 | 53 | 24.6% |
| Group 2 | \$500,000 - \$999,999 | 41 | 19.1% |
| Group 3 | \$1 million - \$2,999,999 | 62 | 28.8% |
| Group 4 | \$3 million - \$4,999,999 | 21 | 9.8% |
| Group 5 | \$5 million - \$9,999,999 | 21 | 9.8% |
| Group 6 | \$10 million or more | 17 | 7.9% |

1) In what month does your fiscal year end?

| | All | Group 1 | Group 2 | Group 3 | Group 4 | Group 5 | Group 6 |
|-----------|-------|---------|---------|---------|---------|---------|---------|
| | 215 | 53 | 41 | 62 | 21 | 21 | 17 |
| January | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| February | 0.5% | 0.0% | 2.4% | 0.0% | 0.0% | 0.0% | 0.0% |
| March | 0.9% | 0.0% | 0.0% | 0.0% | 4.8% | 0.0% | 5.9% |
| April | 0.5% | 0.0% | 0.0% | 1.6% | 0.0% | 0.0% | 0.0% |
| May | 2.8% | 1.9% | 0.0% | 3.2% | 4.8% | 9.5% | 0.0% |
| June | 51.6% | 39.6% | 46.3% | 59.7% | 47.6% | 76.2% | 47.1% |
| July | 7.4% | 7.5% | 9.8% | 6.5% | 9.5% | 0.0% | 11.8% |
| August | 14.4% | 7.5% | 12.2% | 16.1% | 23.8% | 9.5% | 29.4% |
| September | 3.7% | 9.4% | 4.9% | 1.6% | 0.0% | 0.0% | 0.0% |
| October | 0.9% | 0.0% | 2.4% | 0.0% | 0.0% | 0.0% | 5.9% |
| November | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| December | 17.2% | 34.0% | 22.0% | 11.3% | 9.5% | 4.8% | 0.0% |

Questions #2—7 were directed at the 175 participants whose fiscal years end between 3/31 and 9/30/09.

2) How did you end or how do you anticipate ending Fiscal Year 09?

| | All | Group 1 | Group 2 | Group 3 | Group 4 | Group 5 | Group 6 |
|--|-------|---------|---------|---------|---------|---------|---------|
| | 175 | 35 | 30 | 55 | 19 | 20 | 16 |
| Deficit of 1-10% of total expenses | 44.0% | 42.9% | 36.7% | 54.5% | 21.1% | 45.0% | 50.0% |
| Deficit of 11-25% of total expenses | 12.0% | 17.1% | 6.7% | 12.7% | 5.3% | 20.0% | 6.3% |
| Deficit of more than 25% of total expenses | 0.6% | 0.0% | 3.3% | 0.0% | 0.0% | 0.0% | 0.0% |
| Break-even | 22.9% | 20.0% | 20.0% | 18.2% | 36.8% | 25.0% | 31.3% |
| Surplus of 1-10% of total expenses | 18.9% | 20.0% | 33.3% | 10.9% | 36.8% | 5.0% | 12.5% |
| Surplus of 11-25% of total expenses | 1.7% | 0.0% | 0.0% | 3.6% | 0.0% | 5.0% | 0.0% |
| Surplus of more than 25% of total expenses | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |

3) Regarding the above question, how does your answer relate to your original budget for FY09?

| | All | Group 1 | Group 2 | Group 3 | Group 4 | Group 5 | Group 6 |
|--|-------|---------|---------|---------|---------|---------|---------|
| | 175 | 35 | 30 | 55 | 19 | 20 | 16 |
| Worse than budget (surplus = less than original budget; deficit = more than original budget) | 53.7% | 57.1% | 63.3% | 54.5% | 42.1% | 55.0% | 37.5% |
| Better than budget (surplus = more than original budget; deficit = less than original budget) | 16.0% | 2.9% | 20.0% | 20.0% | 26.3% | 10.0% | 18.8% |
| Similar to or same as budget | 30.3% | 40.0% | 16.7% | 25.5% | 31.6% | 35.0% | 43.8% |

4-A) How did/will the end of Fiscal Year 09 compare to the end of Fiscal Year 08? Subscriptions/Memberships

| | All | Group 1 | Group 2 | Group 3 | Group 4 | Group 5 | Group 6 |
|------------------------------|------------|-----------|-----------|-----------|-----------|-----------|-----------|
| | 146 | 22 | 22 | 48 | 19 | 20 | 15 |
| Substantially lower | 8.9% | 0.0% | 9.1% | 12.5% | 5.3% | 10.0% | 13.3% |
| Somewhat lower | 35.6% | 31.8% | 27.3% | 37.5% | 26.3% | 60.0% | 26.7% |
| Same as or similar to | 18.5% | 22.7% | 9.1% | 27.1% | 10.5% | 15.0% | 13.3% |
| Somewhat higher | 25.3% | 18.2% | 36.4% | 18.8% | 36.8% | 10.0% | 46.7% |
| Substantially higher | 11.6% | 27.3% | 18.2% | 4.2% | 21.1% | 5.0% | 0.0% |

4-B) How did/will the end of Fiscal Year 09 compare to the end of Fiscal Year 08? Single Tickets

| | All | Group 1 | Group 2 | Group 3 | Group 4 | Group 5 | Group 6 |
|------------------------------|------------|-----------|-----------|-----------|-----------|-----------|-----------|
| | 169 | 32 | 29 | 53 | 19 | 20 | 16 |
| Substantially lower | 13.6% | 12.5% | 13.8% | 15.1% | 15.8% | 10.0% | 12.5% |
| Somewhat lower | 24.3% | 21.9% | 20.7% | 22.6% | 15.8% | 35.0% | 37.5% |
| Same as or similar to | 23.7% | 31.3% | 17.2% | 28.3% | 21.1% | 20.0% | 12.5% |
| Somewhat higher | 22.5% | 21.9% | 34.5% | 20.8% | 21.1% | 15.0% | 18.8% |
| Substantially higher | 16.0% | 12.5% | 13.8% | 0.1% | 26.3% | 20.0% | 18.8% |

4-C) How did/will the end of Fiscal Year 09 compare to the end of Fiscal Year 08? Class/Tuition Income

| | All | Group 1 | Group 2 | Group 3 | Group 4 | Group 5 | Group 6 |
|------------------------------|------------|-----------|-----------|-----------|-----------|-----------|-----------|
| | 111 | 21 | 18 | 33 | 15 | 13 | 11 |
| Substantially lower | 3.6% | 0.0% | 5.6% | 9.1% | 0.0% | 0.0% | 0.0% |
| Somewhat lower | 23.4% | 42.9% | 16.7% | 12.1% | 40.0% | 15.4% | 18.2% |
| Same as or similar to | 41.4% | 23.8% | 27.8% | 57.6% | 26.7% | 61.5% | 45.5% |
| Somewhat higher | 26.1% | 23.8% | 38.9% | 15.2% | 33.3% | 23.1% | 36.4% |
| Substantially higher | 5.4% | 9.5% | 11.1% | 6.1% | 0.0% | 0.0% | 0.0% |

4-D) How did/will the end of Fiscal Year 09 compare to the end of Fiscal Year 08? Fundraising

| | All | Group 1 | Group 2 | Group 3 | Group 4 | Group 5 | Group 6 |
|------------------------------|------------|-----------|-----------|-----------|-----------|-----------|-----------|
| | 171 | 33 | 30 | 54 | 19 | 19 | 16 |
| Substantially lower | 18.7% | 30.3% | 16.7% | 16.7% | 15.8% | 5.3% | 25.0% |
| Somewhat lower | 44.4% | 39.4% | 50.0% | 38.9% | 47.4% | 52.6% | 50.0% |
| Same as or similar to | 14.6% | 15.2% | 13.3% | 22.2% | 5.3% | 5.3% | 12.5% |
| Somewhat higher | 17.5% | 9.1% | 16.7% | 18.5% | 21.1% | 31.6% | 12.5% |
| Substantially higher | 4.7% | 6.1% | 3.3% | 3.7% | 10.5% | 5.3% | 0.0% |

5) How do subscriptions/memberships for FY10 currently compare with subscriptions/memberships for FY09 at this time last year?

| | All | Group 1 | Group 2 | Group 3 | Group 4 | Group 5 | Group 6 |
|---------------------------------------|------------|-----------|-----------|-----------|-----------|-----------|-----------|
| | 138 | 19 | 19 | 46 | 19 | 20 | 15 |
| Up from FY09 | 23.2% | 26.3% | 47.4% | 19.6% | 15.8% | 15.0% | 20.0% |
| Down from FY09 | 37.7% | 26.3% | 15.8% | 32.6% | 36.8% | 65.0% | 60.0% |
| The same as or similar to FY09 | 39.1% | 47.4% | 36.8% | 47.8% | 47.4% | 20.0% | 20.0% |

6-A) At the end of Fiscal Year 09, how did/will the following compare to your original FY09 budget?

Overall Ticket Sales

| | All | Group 1 | Group 2 | Group 3 | Group 4 | Group 5 | Group 6 |
|------------------------------|------------|-----------|-----------|-----------|-----------|-----------|-----------|
| | 170 | 34 | 28 | 53 | 19 | 20 | 16 |
| Substantially lower | 21.2% | 17.6% | 21.4% | 17.0% | 15.8% | 30.0% | 37.5% |
| Somewhat lower | 32.4% | 41.2% | 17.9% | 35.8% | 31.6% | 45.0% | 12.5% |
| Same as or similar to | 16.5% | 14.7% | 25.0% | 18.9% | 10.5% | 5.0% | 18.8% |
| Somewhat higher | 20.0% | 17.6% | 28.6% | 18.9% | 21.1% | 10.0% | 25.0% |
| Substantially higher | 10.0% | 8.8% | 7.1% | 9.4% | 21.1% | 10.0% | 6.3% |

6-B) At the end of Fiscal Year 09, how did/will the following compare to your original FY09 budget?

Government Contributions

| | All | Group 1 | Group 2 | Group 3 | Group 4 | Group 5 | Group 6 |
|------------------------------|------------|-----------|-----------|-----------|-----------|-----------|-----------|
| | 173 | 35 | 30 | 54 | 19 | 19 | 16 |
| Substantially lower | 10.4% | 11.4% | 10.0% | 13.0% | 5.3% | 10.5% | 6.3% |
| Somewhat lower | 28.3% | 28.6% | 23.3% | 25.9% | 42.1% | 36.8% | 18.8% |
| Same as or similar to | 38.7% | 31.4% | 50.0% | 46.3% | 26.3% | 21.1% | 43.8% |
| Somewhat higher | 16.8% | 11.4% | 16.7% | 14.8% | 15.8% | 21.1% | 31.3% |
| Substantially higher | 5.8% | 17.1% | 0.0% | 0.0% | 10.5% | 10.5% | 0.0% |

6-C) At the end of Fiscal Year 09, how did/will the following compare to your original FY09 budget?

Foundation Contributions

| | All | Group 1 | Group 2 | Group 3 | Group 4 | Group 5 | Group 6 |
|------------------------------|------------|-----------|-----------|-----------|-----------|-----------|-----------|
| | 171 | 35 | 30 | 51 | 19 | 20 | 16 |
| Substantially lower | 15.2% | 22.9% | 10.0% | 13.7% | 10.5% | 20.0% | 12.5% |
| Somewhat lower | 40.4% | 22.9% | 43.3% | 43.1% | 57.9% | 45.0% | 37.5% |
| Same as or similar to | 26.3% | 22.9% | 30.0% | 31.4% | 15.8% | 25.0% | 25.0% |
| Somewhat higher | 12.3% | 25.7% | 10.0% | 5.9% | 10.5% | 0.0% | 25.0% |
| Substantially higher | 5.8% | 5.7% | 6.7% | 5.9% | 5.3% | 10.0% | 0.0% |

| 6-D) At the end of Fiscal Year 09, how did/will the following compare to your original FY09 budget? Corporate Contributions | | | | | | | |
|--|-------|---------|---------|---------|---------|---------|---------|
| | All | Group 1 | Group 2 | Group 3 | Group 4 | Group 5 | Group 6 |
| | 169 | 32 | 29 | 53 | 19 | 20 | 16 |
| Substantially lower | 33.7% | 18.8% | 44.8% | 34.0% | 31.6% | 35.0% | 43.8% |
| Somewhat lower | 37.9% | 40.6% | 34.5% | 30.2% | 57.9% | 40.0% | 37.5% |
| Same as or similar to | 21.9% | 37.5% | 17.2% | 24.5% | 5.3% | 20.0% | 12.5% |
| Somewhat higher | 6.5% | 3.1% | 3.4% | 11.3% | 5.3% | 5.0% | 6.3% |
| Substantially higher | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |

| 6-E) At the end of Fiscal Year 09, how did/will the following compare to your original FY09 budget? Trustee Contributions | | | | | | | |
|--|-------|---------|---------|---------|---------|---------|---------|
| | All | Group 1 | Group 2 | Group 3 | Group 4 | Group 5 | Group 6 |
| | 160 | 27 | 29 | 52 | 18 | 19 | 15 |
| Substantially lower | 8.1% | 0.0% | 10.3% | 7.7% | 0.0% | 15.8% | 20.0% |
| Somewhat lower | 31.3% | 40.7% | 37.9% | 34.6% | 22.2% | 21.1% | 13.3% |
| Same as or similar to | 36.9% | 29.6% | 41.4% | 38.5% | 38.9% | 31.6% | 40.0% |
| Somewhat higher | 16.9% | 25.9% | 3.4% | 15.4% | 16.7% | 31.6% | 13.3% |
| Substantially higher | 6.9% | 3.7% | 6.9% | 3.8% | 22.2% | 0.0% | 13.3% |

| 6-F) At the end of Fiscal Year 09, how did/will the following compare to your original FY09 budget? Non-Trustee Individual Contributions | | | | | | | |
|---|-------|---------|---------|---------|---------|---------|---------|
| | All | Group 1 | Group 2 | Group 3 | Group 4 | Group 5 | Group 6 |
| | 173 | 35 | 28 | 55 | 19 | 20 | 16 |
| Substantially lower | 16.2% | 17.1% | 21.4% | 14.5% | 5.3% | 15.0% | 25.0% |
| Somewhat lower | 38.2% | 37.1% | 39.3% | 32.7% | 47.4% | 45.0% | 37.5% |
| Same as or similar to | 20.2% | 14.3% | 21.4% | 18.2% | 26.3% | 25.0% | 25.0% |
| Somewhat higher | 20.2% | 22.9% | 14.3% | 27.3% | 15.8% | 15.0% | 12.5% |
| Substantially higher | 5.2% | 8.6% | 3.6% | 7.3% | 5.3% | 0.0% | 0.0% |

| 6-G) At the end of Fiscal Year 09, how did/will the following compare to your original FY09 budget? Program Expenses | | | | | | | |
|---|-------|---------|---------|---------|---------|---------|---------|
| | All | Group 1 | Group 2 | Group 3 | Group 4 | Group 5 | Group 6 |
| | 175 | 35 | 30 | 55 | 19 | 20 | 16 |
| Substantially lower | 10.9% | 5.7% | 6.7% | 10.9% | 10.5% | 5.0% | 37.5% |
| Somewhat lower | 40.6% | 34.3% | 33.3% | 43.6% | 42.1% | 45.0% | 50.0% |
| Same as or similar to | 32.0% | 34.3% | 40.0% | 30.9% | 26.3% | 40.0% | 12.5% |
| Somewhat higher | 14.9% | 17.1% | 20.0% | 14.5% | 21.1% | 10.0% | 0.0% |
| Substantially higher | 1.7% | 8.6% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |

**6-H) At the end of Fiscal Year 09, how did/will the following compare to your original FY09 budget?
Personnel Expenses**

| | All | Group 1 | Group 2 | Group 3 | Group 4 | Group 5 | Group 6 |
|------------------------------|------------|----------------|----------------|----------------|----------------|----------------|----------------|
| | 174 | 34 | 30 | 55 | 19 | 20 | 16 |
| Substantially lower | 8.6% | 5.9% | 3.3% | 9.1% | 10.5% | 5.0% | 25.0% |
| Somewhat lower | 37.4% | 23.5% | 26.7% | 38.2% | 47.4% | 55.0% | 50.0% |
| Same as or similar to | 38.5% | 47.1% | 46.7% | 40.0% | 26.3% | 30.0% | 25.0% |
| Somewhat higher | 11.5% | 17.6% | 20.0% | 7.3% | 10.5% | 10.0% | 0.0% |
| Substantially higher | 4.0% | 5.9% | 3.3% | 5.5% | 5.3% | 0.0% | 0.0% |

**6-I) At the end of Fiscal Year 09, how did/will the following compare to your original FY09 budget?
Operations Expenses**

| | All | Group 1 | Group 2 | Group 3 | Group 4 | Group 5 | Group 6 |
|------------------------------|------------|----------------|----------------|----------------|----------------|----------------|----------------|
| | 175 | 35 | 30 | 55 | 19 | 20 | 16 |
| Substantially lower | 5.7% | 2.9% | 10.0% | 5.5% | 0.0% | 0.0% | 18.8% |
| Somewhat lower | 38.9% | 25.7% | 30.0% | 36.4% | 52.6% | 50.0% | 62.5% |
| Same as or similar to | 35.4% | 48.6% | 33.3% | 41.8% | 21.1% | 35.0% | 6.3% |
| Somewhat higher | 16.6% | 22.9% | 16.7% | 14.5% | 21.1% | 10.0% | 12.5% |
| Substantially higher | 3.4% | 0.0% | 10.0% | 1.8% | 5.3% | 5.0% | 0.0% |

7) For FY10, are you:

| | All | Group 1 | Group 2 | Group 3 | Group 4 | Group 5 | Group 6 |
|---|------------|----------------|----------------|----------------|----------------|----------------|----------------|
| | 175 | 35 | 30 | 55 | 19 | 20 | 16 |
| Decreasing your budget from FY09 by 1-10% | 40.6% | 28.6% | 33.3% | 40.0% | 73.7% | 30.0% | 56.3% |
| Decreasing your budget from FY09 by 11-25% | 28.0% | 20.0% | 23.3% | 32.7% | 5.3% | 50.0% | 37.5% |
| Decreasing your budget from FY09 by more than 25% | 2.9% | 8.6% | 0.0% | 0.0% | 0.0% | 10.0% | 0.0% |
| Keeping your budget the same as or similar to FY09 | 14.3% | 28.6% | 16.7% | 12.7% | 10.5% | 0.0% | 6.3% |
| Increasing your budget from FY09 by 1-10% | 9.7% | 8.6% | 20.0% | 10.9% | 5.3% | 5.0% | 0.0% |
| Increasing your budget from FY09 by 11-25% | 4.0% | 2.9% | 6.7% | 3.6% | 5.3% | 5.0% | 0.0% |
| Increasing your budget from FY09 by more than 25% | 0.6% | 2.9% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |

Questions #8—13 were directed at the 40 participants whose fiscal years end between 10/31/09 and 2/28/10.

| 8) Are you re-projecting your expenses for your current fiscal year? | | | | | | | |
|--|-------|---------|---------|---------|---------|---------|---------|
| | All | Group 1 | Group 2 | Group 3 | Group 4 | Group 5 | Group 6 |
| | 40 | 18 | 11 | 7 | 2 | 1 | 1 |
| Yes | 55.0% | 61.1% | 18.2% | 85.7% | 100.0% | 100.0% | 0.0% |
| No | 45.0% | 38.9% | 81.8% | 14.3% | 0.0% | 0.0% | 100.0% |

| 9) At this point in your fiscal year, are you anticipating a year-end budget result that is: | | | | | | | |
|--|-------|---------|---------|---------|---------|---------|---------|
| | All | Group 1 | Group 2 | Group 3 | Group 4 | Group 5 | Group 6 |
| | 40 | 18 | 11 | 7 | 2 | 1 | 1 |
| Deficit of 1-10% of total expenses | 30.0% | 22.2% | 45.5% | 28.6% | 0.0% | 100.0% | 0.0% |
| Deficit of 11-25% of total expenses | 25.0% | 33.3% | 9.1% | 28.6% | 50.0% | 0.0% | 0.0% |
| Deficit of more than 25% of total expenses | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Break-even | 35.0% | 44.4% | 27.3% | 28.6% | 50.0% | 0.0% | 0.0% |
| Surplus of 1-10% of total expenses | 10.0% | 0.0% | 18.2% | 14.3% | 0.0% | 0.0% | 100.0% |
| Surplus of 11-25% of total expenses | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Surplus of more than 25% of total expenses | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |

| 10) Regarding the above question, how does your answer relate to your original budget for your current fiscal year? | | | | | | | |
|---|-------|---------|---------|---------|---------|---------|---------|
| | All | Group 1 | Group 2 | Group 3 | Group 4 | Group 5 | Group 6 |
| | 40 | 18 | 11 | 7 | 2 | 1 | 1 |
| Worse than budget (surplus = less than original budget; deficit = more than original budget) | 55.0% | 55.6% | 45.5% | 71.4% | 50.0% | 100.0% | 0.0% |
| Better than budget (surplus = more than original budget; deficit = less than original budget) | 10.0% | 5.6% | 9.1% | 0.0% | 50.0% | 0.0% | 100.0% |
| Similar to or same as budget | 35.0% | 38.9% | 45.5% | 28.6% | 0.0% | 0.0% | 0.0% |

| 11-A) In this fiscal year, how do the following compare to your previous fiscal year? Subscriptions/memberships | | | | | | | |
|---|-------|---------|---------|---------|---------|---------|---------|
| | All | Group 1 | Group 2 | Group 3 | Group 4 | Group 5 | Group 6 |
| | 29 | 11 | 8 | 7 | 2 | 1 | 0 |
| Substantially lower | 10.3% | 9.1% | 0.0% | 28.6% | 0.0% | 0.0% | 0.0% |
| Somewhat lower | 24.1% | 18.2% | 25.0% | 14.3% | 50.0% | 100.0% | 0.0% |
| Same as or similar to | 48.3% | 63.6% | 37.5% | 42.9% | 50.0% | 0.0% | 0.0% |
| Somewhat higher | 10.3% | 0.0% | 37.5% | 0.0% | 0.0% | 0.0% | 0.0% |
| Substantially higher | 6.9% | 9.1% | 0.0% | 14.3% | 0.0% | 0.0% | 0.0% |

| 11-B) In this fiscal year, how do the following compare to your previous fiscal year? Single Tickets | | | | | | | |
|--|-------|---------|---------|---------|---------|---------|---------|
| | All | Group 1 | Group 2 | Group 3 | Group 4 | Group 5 | Group 6 |
| | 37 | 16 | 10 | 7 | 2 | 1 | 1 |
| Substantially lower | 5.4% | 12.5% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Somewhat lower | 35.1% | 25.0% | 40.0% | 71.4% | 0.0% | 0.0% | 0.0% |
| Same as or similar to | 43.2% | 37.5% | 40.0% | 28.6% | 100.0% | 100.0% | 100.0% |
| Somewhat higher | 13.5% | 18.8% | 20.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Substantially higher | 2.7% | 6.3% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |

| 11-C) In this fiscal year, how do the following compare to your previous fiscal year? Class/Tuition Income | | | | | | | |
|--|-------|---------|---------|---------|---------|---------|---------|
| | All | Group 1 | Group 2 | Group 3 | Group 4 | Group 5 | Group 6 |
| | 23 | 10 | 6 | 3 | 2 | 1 | 1 |
| Substantially lower | 17.4% | 30.0% | 16.7% | 0.0% | 0.0% | 0.0% | 0.0% |
| Somewhat lower | 13.0% | 10.0% | 16.7% | 33.3% | 0.0% | 0.0% | 0.0% |
| Same as or similar to | 47.8% | 30.0% | 66.7% | 0.0% | 100.0% | 100.0% | 100.0% |
| Somewhat higher | 17.4% | 30.0% | 0.0% | 33.3% | 0.0% | 0.0% | 0.0% |
| Substantially higher | 4.3% | 0.0% | 0.0% | 33.3% | 0.0% | 0.0% | 0.0% |

| 11-D) In this fiscal year, how do the following compare to your previous fiscal year? Fundraising | | | | | | | |
|---|-------|---------|---------|---------|---------|---------|---------|
| | All | Group 1 | Group 2 | Group 3 | Group 4 | Group 5 | Group 6 |
| | 40 | 18 | 11 | 7 | 2 | 1 | 1 |
| Substantially lower | 22.5% | 27.8% | 9.1% | 28.6% | 50.0% | 0.0% | 0.0% |
| Somewhat lower | 50.0% | 44.4% | 45.5% | 71.4% | 50.0% | 100.0% | 0.0% |
| Same as or similar to | 17.5% | 16.7% | 36.4% | 0.0% | 0.0% | 0.0% | 0.0% |
| Somewhat higher | 10.0% | 11.1% | 9.1% | 0.0% | 0.0% | 0.0% | 100.0% |
| Substantially higher | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |

12-A) At the end of your fiscal year, to what degree do you anticipate the following will vary from your original budget? Overall Ticket Sales

| | All | Group 1 | Group 2 | Group 3 | Group 4 | Group 5 | Group 6 |
|------------------------------|-----------|-----------|-----------|----------|----------|----------|----------|
| | 38 | 17 | 10 | 7 | 2 | 1 | 1 |
| Substantially lower | 7.9% | 11.8% | 0.0% | 14.3% | 0.0% | 0.0% | 0.0% |
| Somewhat lower | 31.6% | 23.5% | 30.0% | 42.9% | 50.0% | 100.0% | 0.0% |
| Same as or similar to | 36.8% | 29.4% | 50.0% | 42.9% | 50.0% | 0.0% | 0.0% |
| Somewhat higher | 23.7% | 35.3% | 20.0% | 0.0% | 0.0% | 0.0% | 100.0% |
| Substantially higher | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |

12-B) At the end of your fiscal year, to what degree do you anticipate the following will vary from your original budget? Government Contributions

| | All | Group 1 | Group 2 | Group 3 | Group 4 | Group 5 | Group 6 |
|------------------------------|-----------|-----------|-----------|----------|----------|----------|----------|
| | 39 | 17 | 11 | 7 | 2 | 1 | 1 |
| Substantially lower | 12.8% | 11.8% | 18.2% | 0.0% | 50.0% | 0.0% | 0.0% |
| Somewhat lower | 46.2% | 47.1% | 45.5% | 57.1% | 0.0% | 100.0% | 0.0% |
| Same as or similar to | 25.6% | 17.6% | 27.3% | 42.9% | 50.0% | 0.0% | 0.0% |
| Somewhat higher | 10.3% | 11.8% | 9.1% | 0.0% | 0.0% | 0.0% | 100.0% |
| Substantially higher | 5.1% | 11.8% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |

12-C) At the end of your fiscal year, to what degree do you anticipate the following will vary from your original budget? Foundation Contributions

| | All | Group 1 | Group 2 | Group 3 | Group 4 | Group 5 | Group 6 |
|------------------------------|-----------|-----------|-----------|----------|----------|----------|----------|
| | 39 | 17 | 11 | 7 | 2 | 1 | 1 |
| Substantially lower | 12.8% | 5.9% | 27.3% | 14.3% | 0.0% | 0.0% | 0.0% |
| Somewhat lower | 46.2% | 70.6% | 18.2% | 42.9% | 50.0% | 0.0% | 0.0% |
| Same as or similar to | 28.2% | 11.8% | 45.5% | 42.9% | 0.0% | 100.0% | 0.0% |
| Somewhat higher | 12.8% | 11.8% | 9.1% | 0.0% | 50.0% | 0.0% | 100.0% |
| Substantially higher | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |

12-D) At the end of your fiscal year, to what degree do you anticipate the following will vary from your original budget? Corporate Contributions

| | All | Group 1 | Group 2 | Group 3 | Group 4 | Group 5 | Group 6 |
|------------------------------|-----------|-----------|----------|----------|----------|----------|----------|
| | 37 | 17 | 9 | 7 | 2 | 1 | 1 |
| Substantially lower | 29.7% | 29.4% | 22.2% | 28.6% | 100.0% | 0.0% | 0.0% |
| Somewhat lower | 37.8% | 41.2% | 33.3% | 57.1% | 0.0% | 0.0% | 0.0% |
| Same as or similar to | 21.6% | 23.5% | 33.3% | 14.3% | 0.0% | 0.0% | 0.0% |
| Somewhat higher | 10.8% | 5.9% | 11.1% | 0.0% | 0.0% | 100.0% | 100.0% |
| Substantially higher | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |

**12-E) At the end of your fiscal year, to what degree do you anticipate the following will vary from your original budget?
Trustee Contributions**

| | All | Group 1 | Group 2 | Group 3 | Group 4 | Group 5 | Group 6 |
|------------------------------|-----------|-----------|-----------|----------|----------|----------|----------|
| | 35 | 13 | 11 | 7 | 2 | 1 | 1 |
| Substantially lower | 14.3% | 15.4% | 9.1% | 14.3% | 50.0% | 0.0% | 0.0% |
| Somewhat lower | 22.9% | 38.5% | 9.1% | 28.6% | 0.0% | 0.0% | 0.0% |
| Same as or similar to | 48.6% | 38.5% | 63.6% | 28.6% | 50.0% | 100.0% | 100.0% |
| Somewhat higher | 14.3% | 7.7% | 18.2% | 28.6% | 0.0% | 0.0% | 0.0% |
| Substantially higher | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |

12-F) At the end of your fiscal year, to what degree do you anticipate the following will vary from your original budget? Non-Trustee Individual Contributions

| | All | Group 1 | Group 2 | Group 3 | Group 4 | Group 5 | Group 6 |
|------------------------------|-----------|-----------|-----------|----------|----------|----------|----------|
| | 39 | 17 | 11 | 7 | 2 | 1 | 1 |
| Substantially lower | 12.8% | 11.8% | 18.2% | 14.3% | 0.0% | 0.0% | 0.0% |
| Somewhat lower | 33.3% | 52.9% | 9.1% | 42.9% | 0.0% | 0.0% | 0.0% |
| Same as or similar to | 38.5% | 29.4% | 45.5% | 42.9% | 50.0% | 0.0% | 100.0% |
| Somewhat higher | 12.8% | 5.9% | 27.3% | 0.0% | 0.0% | 100.0% | 0.0% |
| Substantially higher | 2.6% | 0.0% | 0.0% | 0.0% | 50.0% | 0.0% | 0.0% |

**12-G) At the end of your fiscal year, to what degree do you anticipate the following will vary from your original budget?
Program Expenses**

| | All | Group 1 | Group 2 | Group 3 | Group 4 | Group 5 | Group 6 |
|------------------------------|-----------|-----------|-----------|----------|----------|----------|----------|
| | 40 | 18 | 11 | 7 | 2 | 1 | 1 |
| Substantially lower | 5.0% | 5.6% | 0.0% | 14.3% | 0.0% | 0.0% | 0.0% |
| Somewhat lower | 30.0% | 33.3% | 9.1% | 42.9% | 100.0% | 0.0% | 0.0% |
| Same as or similar to | 42.5% | 44.4% | 45.5% | 28.6% | 0.0% | 100.0% | 100.0% |
| Somewhat higher | 22.5% | 16.7% | 45.5% | 14.3% | 0.0% | 0.0% | 0.0% |
| Substantially higher | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |

**12-H) At the end of your fiscal year, to what degree do you anticipate the following will vary from your original budget?
Personnel Expenses**

| | All | Group 1 | Group 2 | Group 3 | Group 4 | Group 5 | Group 6 |
|------------------------------|-----------|-----------|-----------|----------|----------|----------|----------|
| | 39 | 17 | 11 | 7 | 2 | 1 | 1 |
| Substantially lower | 10.3% | 17.6% | 0.0% | 0.0% | 50.0% | 0.0% | 0.0% |
| Somewhat lower | 25.6% | 23.5% | 9.1% | 57.1% | 50.0% | 0.0% | 0.0% |
| Same as or similar to | 43.6% | 47.1% | 45.5% | 28.6% | 0.0% | 100.0% | 100.0% |
| Somewhat higher | 17.9% | 5.9% | 45.5% | 14.3% | 0.0% | 0.0% | 0.0% |
| Substantially higher | 2.6% | 5.9% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |

**12-I) At the end of your fiscal year, to what degree do you anticipate the following will vary from your original budget?
Operations Expenses**

| | All | Group 1 | Group 2 | Group 3 | Group 4 | Group 5 | Group 6 |
|-----------------------|-----------|-----------|-----------|----------|----------|----------|----------|
| | 40 | 18 | 11 | 7 | 2 | 1 | 1 |
| Substantially lower | 5.0% | 11.1% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Somewhat lower | 27.5% | 22.2% | 9.1% | 57.1% | 100.0% | 0.0% | 0.0% |
| Same as or similar to | 45.0% | 50.0% | 45.5% | 28.6% | 0.0% | 100.0% | 100.0% |
| Somewhat higher | 20.0% | 11.1% | 45.5% | 14.3% | 0.0% | 0.0% | 0.0% |
| Substantially higher | 2.5% | 5.6% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |

13) In looking at your next fiscal year, do you anticipate:

| | All | Group 1 | Group 2 | Group 3 | Group 4 | Group 5 | Group 6 |
|--|-----------|-----------|-----------|----------|----------|----------|----------|
| | 40 | 18 | 11 | 7 | 2 | 1 | 1 |
| Decreasing your budget from your current fiscal year by 1-10% | 30.0% | 27.8% | 36.4% | 42.9% | 0.0% | 0.0% | 0.0% |
| Decreasing your budget from your current fiscal year by 11-25% | 10.0% | 11.1% | 0.0% | 14.3% | 50.0% | 0.0% | 0.0% |
| Decreasing your budget from your current fiscal year by more than 25% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Keeping your budget the same as or similar to your current fiscal year | 42.5% | 44.4% | 45.5% | 42.9% | 0.0% | 100.0% | 0.0% |
| Increasing your budget from your current fiscal year by 1-10% | 15.0% | 11.1% | 18.2% | 0.0% | 50.0% | 0.0% | 100.0% |
| Increasing your budget from your current fiscal year by 11-25% | 2.5% | 5.6% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Increasing your budget from your current fiscal year by more than 25% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |

Questions #14—21 were directed at all 215 participants.

14) Do you have an endowment?

| | All | Group 1 | Group 2 | Group 3 | Group 4 | Group 5 | Group 6 |
|-----|------------|-----------|-----------|-----------|-----------|-----------|-----------|
| | 215 | 53 | 41 | 62 | 21 | 21 | 17 |
| Yes | 39.5% | 7.5% | 22.0% | 46.8% | 42.9% | 81.0% | 100.0% |
| No | 60.5% | 92.5% | 78.0% | 53.2% | 57.1% | 19.0% | 0.0% |

15) Has your endowment fallen below its historical value, making it legally difficult to take a draw?

| | All | Group 1 | Group 2 | Group 3 | Group 4 | Group 5 | Group 6 |
|-----|-------|---------|---------|---------|---------|---------|---------|
| | 85 | 4 | 9 | 29 | 9 | 17 | 17 |
| Yes | 36.5% | 0.0% | 11.1% | 44.8% | 22.2% | 52.9% | 35.3% |
| No | 63.5% | 100.0% | 88.9% | 55.2% | 77.8% | 47.1% | 64.7% |

16) Has the percentage of your draw:

| | All | Group 1 | Group 2 | Group 3 | Group 4 | Group 5 | Group 6 |
|--|-------|---------|---------|---------|---------|---------|---------|
| | 85 | 4 | 9 | 29 | 9 | 17 | 17 |
| Increased from your last fiscal year | 5.9% | 25.0% | 11.1% | 3.4% | 0.0% | 5.9% | 5.9% |
| Decreased from your last fiscal year | 40.0% | 0.0% | 33.3% | 37.9% | 33.3% | 58.8% | 41.2% |
| Remained the same as or similar to your last fiscal year | 54.1% | 75.0% | 55.6% | 58.6% | 66.7% | 35.3% | 52.9% |

17) Are you having or do you expect to have cash flow problems this year?

| | All | Group 1 | Group 2 | Group 3 | Group 4 | Group 5 | Group 6 |
|-----|-------|---------|---------|---------|---------|---------|---------|
| | 215 | 53 | 41 | 62 | 21 | 21 | 17 |
| Yes | 53.0% | 64.2% | 61.0% | 50.0% | 42.9% | 52.4% | 23.5% |
| No | 47.0% | 35.8% | 39.0% | 50.0% | 57.1% | 47.6% | 76.5% |

18) Have you had trouble securing a line of credit from a bank?

| | All | Group 1 | Group 2 | Group 3 | Group 4 | Group 5 | Group 6 |
|-----|-------|---------|---------|---------|---------|---------|---------|
| | 126 | 23 | 22 | 39 | 14 | 15 | 13 |
| Yes | 25.4% | 47.8% | 22.7% | 17.9% | 7.1% | 40.0% | 15.4% |
| No | 74.6% | 52.2% | 77.3% | 82.1% | 92.9% | 60.0% | 84.6% |

| 19) Have you taken or do you plan to take any of the following budgetary actions in response to the economic crisis? (Check all that apply) | | | | | | | |
|--|-------|---------|---------|---------|---------|---------|---------|
| | All | Group 1 | Group 2 | Group 3 | Group 4 | Group 5 | Group 6 |
| | 206 | 49 | 39 | 59 | 21 | 21 | 17 |
| Reduction in the # of productions | 31.6% | 28.6% | 23.1% | 40.7% | 19.0% | 42.9% | 29.4% |
| Reduction in the # of performances | 22.8% | 28.6% | 7.7% | 18.6% | 19.0% | 47.6% | 29.4% |
| Substitution of a produced show in your season with a booked-in show | 9.7% | 4.1% | 12.8% | 8.5% | 9.5% | 23.8% | 5.9% |
| Substitution of a larger cast show in your season with a smaller cast show | 35.9% | 30.6% | 17.9% | 52.5% | 28.6% | 33.3% | 47.1% |
| Reduction or cancellation of other programming or events | 23.8% | 14.3% | 17.9% | 32.2% | 19.0% | 42.9% | 17.6% |
| New ticket discounting | 42.2% | 38.8% | 41.0% | 44.1% | 38.1% | 47.6% | 47.1% |
| Alternative uses of facilities | 24.8% | 24.5% | 38.5% | 20.3% | 23.8% | 23.8% | 11.8% |
| Additional income-generating programming (non-ticket sales) | 33.0% | 32.7% | 46.2% | 32.2% | 28.6% | 28.6% | 17.6% |
| Halt/reassessment of Capital Campaign | 18.4% | 6.1% | 12.8% | 20.3% | 19.0% | 47.6% | 23.5% |
| Reduction in traveling/conferences | 56.3% | 30.6% | 53.8% | 67.8% | 52.4% | 76.2% | 76.5% |
| Reduction in the # of administrative staff | 48.1% | 36.7% | 35.9% | 45.8% | 38.1% | 85.7% | 82.4% |
| Reduction in the # of artistic staff | 20.9% | 18.4% | 20.5% | 25.4% | 14.3% | 28.6% | 11.8% |
| Reduction in the # of paid artists (actors, directors, designers, choreographers, singers, dancers, etc.) | 47.1% | 42.9% | 25.6% | 59.3% | 33.3% | 66.7% | 58.8% |
| Reduction in the # of technical/production staff | 35.9% | 34.7% | 20.5% | 35.6% | 23.8% | 66.7% | 52.9% |
| Change of salaried staff to seasonal/part-time | 23.8% | 20.4% | 7.7% | 23.7% | 28.6% | 47.6% | 35.3% |
| Reduction or freeze of salaries | 68.9% | 32.7% | 71.8% | 78.0% | 76.2% | 95.2% | 94.1% |
| Imposition of staff furloughs | 21.8% | 6.1% | 23.1% | 30.5% | 14.3% | 33.3% | 29.4% |
| Suspension of retirement plan matches | 13.1% | 0.0% | 2.6% | 6.8% | 0.0% | 52.4% | 64.7% |
| Requirement of greater employee contributions to company health plan | 15.5% | 4.1% | 15.4% | 18.6% | 19.0% | 28.6% | 17.6% |
| Reduction in spouse/family benefits | 3.4% | 2.0% | 7.7% | 3.4% | 4.8% | 0.0% | 0.0% |
| Reduction in other fringe benefits | 6.8% | 4.1% | 7.7% | 3.4% | 4.8% | 19.0% | 11.8% |

Other comments and examples of budgetary actions taken include: Doing 2 shows in repertory instead of separately; increased rental of facilities to others; recycling materials instead of purchasing; reduction of interest payments; streamlining administrative structure; reduction of overhead (i.e. janitorial services); more programming & higher ticket prices; investing more in development infrastructure to increase contributed income; ceasing parking reimbursement; we already operate on a shoestring budget so there really isn't any more downsizing to be done.

| 20) Have you implemented or do you plan to implement any of the following practices? (Check all that apply) | | | | | | | |
|---|-------|---------|---------|---------|---------|---------|---------|
| | All | Group 1 | Group 2 | Group 3 | Group 4 | Group 5 | Group 6 |
| | 210 | 51 | 41 | 61 | 20 | 21 | 16 |
| More communication with stakeholders | 73.3% | 62.7% | 75.6% | 77.0% | 70.0% | 85.7% | 75.0% |
| Revised internal planning process | 58.1% | 60.8% | 53.7% | 50.8% | 65.0% | 66.7% | 68.8% |
| More use of technology and social networking | 83.8% | 84.3% | 80.5% | 86.9% | 85.0% | 90.5% | 68.8% |
| Narrowing of focus to programs within the core of artistic mission | 34.3% | 33.3% | 26.8% | 34.4% | 55.0% | 28.6% | 37.5% |
| Broadening of focus to programs outside the core of artistic mission | 10.0% | 5.9% | 19.5% | 6.6% | 10.0% | 14.3% | 6.3% |
| Shared services, space and/or operations with other organizations | 38.6% | 37.3% | 46.3% | 45.9% | 25.0% | 38.1% | 12.5% |
| Joining with other organizations to buy in bulk/collectively bargain for reduced rates | 11.4% | 17.6% | 9.8% | 11.5% | 10.0% | 9.5% | 0.0% |

Other examples of practices implemented include: Program-based partnerships with other organizations; joining with other organizations for collective marketing strategies, community relations and cross promotions; outsourcing of non-critical operations; offering staff-taught master classes.

| 21) At this point, how would you best describe the state of your organization in relation to the economic crisis? | | | | | | | |
|---|-------|---------|---------|---------|---------|---------|---------|
| | All | Group 1 | Group 2 | Group 3 | Group 4 | Group 5 | Group 6 |
| | 215 | 53 | 41 | 62 | 21 | 21 | 17 |
| We haven't been hit hard by the economic crisis and don't think we will be | 1.4% | 1.9% | 0.0% | 1.6% | 4.8% | 0.0% | 0.0% |
| We haven't been hit hard by the economic crisis, but fear the other shoe will drop | 7.9% | 9.4% | 4.9% | 8.1% | 14.3% | 4.8% | 5.9% |
| We're feeling the impact of the economic crisis, but think things will remain level/improve | 42.8% | 50.9% | 51.2% | 38.7% | 42.9% | 19.0% | 41.2% |
| We're feeling the impact of the economic crisis and worry that worse is coming | 28.4% | 20.8% | 26.8% | 25.8% | 28.6% | 52.4% | 35.3% |
| We have been hit extremely hard by the economic crisis, but think things will remain level/improve | 13.0% | 11.3% | 9.8% | 17.7% | 4.8% | 14.3% | 17.6% |
| We have been hit extremely hard by the economic crisis and worry that worse is coming | 6.0% | 3.8% | 7.3% | 8.1% | 4.8% | 9.5% | 0.0% |
| We have been hit extremely hard by the economic crisis and our organization is in peril | 0.5% | 1.9% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |

Additional comments include: We feel it's important not to scrimp on artistic, production or marketing expenses; the recession has forced us to make long-deferred hard choices which will make us stronger; we were facing cash flow problems until we brought together stakeholders and were completely honest about our situation; we have found this difficult time the best to re-evaluate existing programs and unfreeze our thinking and approach to our play making; the economic crisis has been difficult, but we're still seeing an enthusiasm in the audience; we already had all our commitments lined up for this year so we are expecting to feel the squeeze more next year.