

Maryland Arts and Entertainment District Survey Analysis FY 2018

Prepared for
Maryland State Arts Council

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1.0 Executive Summary

The Maryland State Arts Council (MSAC) manages the State of Maryland's Arts and Entertainment District (A&E District) program. The purpose of the program is to "help develop and promote community involvement, tourism, and revitalization through tax-related incentives that attract artists, arts organizations, and other creative enterprises to towns and cities across the state."¹ Each A&E District has unique economic development goals and priorities, which can include producing or facilitating events, attracting new businesses, attracting developers, encouraging artists to locate and/or sell artworks in the district's boundaries, or a combination of strategies.

Each year, MSAC distributes an annual report for each district to complete, allowing each district to highlight the activities undertaken within their district for the past fiscal year (FY).

MSAC tasked the Regional Economic Studies Institute (RESI) of Towson University with analyzing the data collected from the annual report. To achieve the project objective, RESI collated and analyzed the survey results in a comprehensive report of all 25 districts for FY 2018. It is important to note that all data are self-reported by the A&E Districts.

RESI's analysis of the survey data includes the following:

- There were a total of
 - 162 new capital projects,
 - 107 new retailers,
 - 123 new businesses,
 - 80 new restaurants, and
 - 22 new organizations.
- Despite various business closures, the number of new openings was great enough to net
 - 41 new retailers,
 - 80 new businesses,
 - 26 new restaurants, and
 - 14 organizations.
- Challenges that Maryland's A&E Districts faced generally fall into categories such as funding, available and affordable space, staffing issues, interagency relationships, administration, and "other."
- The 1,139 events and 143 festivals attracted an estimated 840,033 and 845,708 attendees, respectively.
- Maryland's A&E Districts reported that there are 597 enterprises within their borders, including galleries/co-ops, performance venues, arts organizations, arts suppliers/services, arts education organizations, museums, and "other" enterprises. These attract an estimated attendance of over 3.9 million individuals.

¹ "Arts & Entertainment Districts," Maryland State Arts Council, accessed February 12, 2019, <https://www.msac.org/programs/arts-entertainment-districts>.

- Maryland's A&E Districts reported that 188 works of public art are available for visitors to enjoy.
- Thirteen districts reported that they have housing specifically for artists, with 961 total units available.
- Eleven districts maintain artist registries and have 634 registered artists; overall, the 25 districts estimate that there are 5,280 artists working and creating within their boundaries.
- Businesses within the A&E Districts take advantage of the Admissions and Amusement Tax abatement as well as property tax credits. Other incentives that districts reported include façade improvement, loans, grants, other tax abatements/credits, and non-financial incentives.
- Two districts received federal funding, totaling \$85,000.
- Fourteen districts reported receiving funding from MSAC, totaling \$76,161.
- Other reported state funding came from the following sources:
 - Maryland Main Street—\$66,500;
 - Heritage Areas Authority/Planning—\$62,500;
 - Capitol Bond—\$300,000;
 - The Maryland Film Office—\$1,000;
 - The Department of Housing and Community Development—\$1,930,000;
 - The Maryland Department of Natural Resources—\$118,500;
 - Community Legacy Grants—\$70,000; and
 - Clean Up Green Up Maryland—\$4,000.
- Local funding awards, often from arts councils or municipalities, totaled \$503,250.
- Districts also received operational and in-kind support, valued at roughly \$1.4 million and \$469,106, respectively.
- Some of the overarching goals of the A&E Districts include the following:
 - To expand public art projects;
 - To increase marketing, branding, and awareness efforts, particularly with signage;
 - To continue to support existing district activities while also cultivating new opportunities;
 - To strengthen outreach to local students and community members; and
 - To provide opportunities for those involved with district management/operations to develop in their roles.
- To achieve these goals, districts have developed work plans with actionable steps.
- Technical assistance that districts request from MSAC, excluding funding, are often related to networking, marketing, professional development, and assistance with state tax processes.

2.0 Introduction

The Maryland State Arts Council (MSAC) manages the State of Maryland’s Arts and Entertainment District (A&E District) program. The purpose of the program is to “help develop and promote community involvement, tourism, and revitalization through tax-related incentives that attract artists, arts organizations, and other creative enterprises to towns and cities across the state.”² Each A&E District has unique economic development goals and priorities, which can include producing or facilitating events, attracting new businesses, attracting developers, encouraging artists to locate and/or sell artworks in the district’s boundaries, or a combination of strategies.

Each year, MSAC distributes an annual report for each district to complete, allowing each district to highlight the activities undertaken within their district for the past fiscal year (FY).

MSAC sought an analysis of the data from the annual report distributed to each of the A&E Districts. The annual reports collect district-specific data for FY 2018. The Regional Economic Studies Institute (RESI) of Towson University tabulated and analyzed this data to provide MSAC with a comprehensive survey analysis for FY 2018. The data captured in the analysis are self-reported by the individual A&E Districts; as such, some figures may be overestimated or underestimated.

Where applicable, the analysis presents data regarding the number and percentage of respondents for each answer choice for multiple-choice questions. In cases where questions were open ended, RESI reported where respondents replied with similar answers and/or presented a sample of direct quotes collected.

3.0 Survey Analysis

Each of the 25 A&E Districts within Maryland during FY 2018 received and completed the annual report. MSAC provided these reports to RESI, who then collated and analyzed them. The sections below detail the results. Please note that totals may not sum due to rounding.

To view the annual report format and questions, please refer to Appendix A. For a description of the limitations encountered within the annual report data provided, please refer to Appendix B.

3.1 FY 2018 Accomplishments

In the annual report, districts were asked to highlight various accomplishments during FY 2018, including new capital projects initiated or completed during the fiscal year, new retailers that opened, new businesses that opened, new restaurants that opened, and new organizations that located in the district.

² “Arts & Entertainment Districts,” Maryland State Arts Council, accessed February 12, 2019, <https://www.msac.org/programs/arts-entertainment-districts>.

Maryland Arts and Entertainment Districts Survey Analysis FY 2018

RESI of Towson University

Figure 1: New Entities by District, FY 2018

A&E District	New Capital Projects		New Retailers		New Businesses		New Restaurants		New Organizations	
	Number	Percentage	Number	Percentage	Number	Percentage	Number	Percentage	Number	Percentage
Annapolis	7	4.3%	1	0.9%	6	4.9%	2	2.9%	1	4.5%
Bel Air	0	0.0%	5	4.7%	5	4.1%	2	2.9%	0	0.0%
Berlin	4	2.5%	9	8.4%	0	0.0%	0	0.0%	0	0.0%
Bethesda	4	2.5%	11	10.3%	16	13.0%	11	15.7%	5	22.7%
Bromo Tower	6	3.7%	5	4.7%	6	4.9%	7	10.0%	1	4.5%
Cambridge	11	6.8%	4	3.7%	9	7.3%	2	2.9%	1	4.5%
Chestertown	6	3.7%	6	5.6%	2	1.6%	0	0.0%	1	4.5%
Cumberland	7	4.3%	8	7.5%	6	4.9%	4	5.7%	0	0.0%
Denton	1	0.6%	1	0.9%	1	0.8%	1	1.4%	1	4.5%
Elkton	3	1.9%	2	1.9%	1	0.8%	1	1.4%	0	0.0%
Frederick	10	6.2%	16	15.0%	10	8.1%	6	8.6%	0	0.0%
Frostburg	3	1.9%	4	3.7%	0	0.0%	2	2.9%	1	4.5%
Gateway	6	3.7%	5	4.7%	4	3.3%	0	0.0%	0	0.0%
Grantsville	0	0.0%	1	0.9%	0	0.0%	0	0.0%	0	0.0%
Hagerstown	18	11.1%	1	0.9%	14	11.4%	4	5.7%	0	0.0%
Havre de Grace	2	1.2%	2	1.9%	8	6.5%	1	1.4%	2	9.1%
Highlandtown	24	14.8%	8	7.5%	4	3.3%	2	2.9%	1	4.5%
Leonardtwn	5	3.1%	4	3.7%	4	3.3%	1	1.4%	1	4.5%
Oakland	1	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Salisbury	10	6.2%	2	1.9%	4	3.3%	2	2.9%	0	0.0%
Silver Spring	24	14.8%	6	5.6%	8	6.5%	11	15.7%	1	4.5%
Snow Hill	0	0.0%	2	1.9%	7	5.7%	0	0.0%	0	0.0%
Station North	3	1.9%	1	0.9%	3	2.4%	3	4.3%	4	18.2%
Stevensville	1	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Wheaton	6	3.7%	3	2.8%	5	4.1%	8	11.4%	2	9.1%
Total	162	100.0%	107	100.0%	123	100.0%	80	100.0%	22	100.0%

Sources: Maryland A&E Districts, MSAC, RESI

The A&E Districts reported a total of 162 new capital projects initiated or completed during FY 2018. These projects ranged in scope from new hotels to performance space renovations to residential construction and paving projects. With 24 projects each, Highlandtown and Silver Spring had the highest number of new capital projects, each making up 14.8 percent of the total. Hagerstown had the next highest total, at 18, or 11.1 percent. Bel Air, Grantsville, and Snow Hill each reported having no new capital projects in FY 2018.

Maryland's A&E Districts reported that 107 new retailers opened within their borders in FY 2018. These encompass an array of retailers, including bookstores, local grocers, and clothing stores. Frederick reported the largest number of new retailers, with 16 (or 15.0 percent of the total) openings during the fiscal year. Bethesda reported the second-highest number, with 11, or 10.3 percent. Oakland and Stevensville reported that no new retailers opened within their districts during the same fiscal year.

Throughout FY 2018, 123 new businesses opened in Maryland's A&E Districts. These represent a wide range of businesses, including but not limited to Pilates studios, preschools, law firms, and arts enterprises. Bethesda, with 16 new businesses representing 13.0 percent of the total, had the largest number of new businesses. Hagerstown and Frederick were not far behind Bethesda, and reported that 14 and 10 new businesses opened up in their districts, respectively. Berlin, Frostburg, Grantsville, Oakland, and Stevensville reported no new businesses in FY 2018.

Maryland's A&E Districts reported 80 restaurant openings in FY 2018, ranging from small local coffee shops to full-service restaurants and bars. The plurality of these restaurants opened in Montgomery County: 11 (15.7 percent of the total) in Silver Spring, 11 (15.7 percent of the total) in Bethesda, and 8 (11.4 percent of the total) in Wheaton. Seven districts—Berlin, Chestertown, Gateway, Grantsville, Oakland, Snow Hill and Stevensville—reported no new restaurant openings during FY 2018.

Of the 22 new organizations that Maryland's A&E Districts reported in FY 2018, five are in Bethesda and four are in Station North. Both Havre de Grace and Wheaton reported two new organizations. Many of these 22 organizations are arts or community-focused non-profits.

3.2 Closings

Districts were also asked about the number of closings that occurred within their boundaries during FY 2018. Information regarding retailers, businesses, restaurants, and organizations was included in the annual reports.

Maryland Arts and Entertainment Districts Survey Analysis FY 2018
RESI of Towson University

Figure 2: Closures by A&E District, FY 2018

A&E District	Retail		Businesses		Restaurants		Organizations	
	Number	Percentage	Number	Percentage	Number	Percentage	Number	Percentage
Annapolis	1	1.5%	1	2.3%	2	4.5%	1	12.5%
Bel Air	2	3.0%	2	4.7%	0	0.0%	0	0.0%
Berlin	6	9.1%	0	0.0%	0	0.0%	0	0.0%
Bethesda	14	21.2%	4	9.3%	9	20.5%	0	0.0%
Bromo Tower	4	6.1%	4	9.3%	5	11.4%	0	0.0%
Cambridge	2	3.0%	0	0.0%	0	0.0%	1	12.5%
Chestertown	0	0.0%	0	0.0%	2	4.5%	0	0.0%
Cumberland	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Denton	0	0.0%	1	2.3%	0	0.0%	0	0.0%
Elkton	2	3.0%	0	0.0%	0	0.0%	0	0.0%
Frederick	13	19.7%	6	14.0%	4	9.1%	0	0.0%
Frostburg	1	1.5%	1	2.3%	4	9.1%	0	0.0%
Gateway	2	3.0%	4	9.3%	1	2.3%	1	12.5%
Grantsville	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Hagerstown	1	1.5%	2	4.7%	2	4.5%	1	12.5%
Havre de Grace	1	1.5%	0	0.0%	0	0.0%	0	0.0%
Highlandtown	6	9.1%	5	11.6%	1	2.3%	2	25.0%
Leonardtwn	0	0.0%	1	2.3%	1	2.3%	0	0.0%
Oakland	1	1.5%	1	2.3%	1	2.3%	0	0.0%
Salisbury	3	4.5%	3	7.0%	1	2.3%	0	0.0%
Silver Spring	3	4.5%	2	4.7%	7	15.9%	2	25.0%
Snow Hill	2	3.0%	3	7.0%	1	2.3%	0	0.0%
Station North	1	1.5%	1	2.3%	2	4.5%	0	0.0%
Stevensville	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Wheaton	1	1.5%	2	4.7%	1	2.3%	0	0.0%
Total	66	100.0%	43	100.0%	44	100.0%	8	100.0%

Sources: Maryland A&E Districts, MSAC, RESI

A&E Districts reported 66 retail closures in FY 2018. With 14 retail closings, Bethesda reported the largest number, followed by Frederick, with 13 closures reported in FY 2018. Six districts—Chestertown, Cumberland, Denton, Grantsville, Leonardtown, and Stevensville—reported no retail closures.

In total, Maryland's A&E Districts in FY 2018 reported 43 business closures in FY 2018. Six closures, representing 14.0 percent of the total, occurred in Frederick. Highlandtown saw five closures, making up 11.6 percent of the total. Bromo Tower, Bethesda, and Gateway each reported four business closures, or 9.3 percent of the total, respectively.

Statewide, Maryland's A&E Districts reported a total of 44 restaurant closures in FY 2018. Bethesda reported nine restaurant closures, or 20.5 percent of the total, followed by Silver Spring, with seven closures, representing 15.9 percent of the total. Nine districts reported no restaurant closures in FY 2018.

In total, eight organizations closed or relocated out of Maryland's A&E Districts in FY 2018. Highlandtown and Silver Spring both experienced two closures in their respective districts, making up 50.0 percent of the total.

To understand further the dynamics of Maryland's A&E Districts, RESI considered the net changes in the numbers of retailers, businesses, restaurants, and organizations. As seen in Figure 3, Maryland's A&E Districts reported a net increase of 41 retailers, 80 businesses, 26 restaurants, and 14 organizations in FY 2018.

Figure 3: Net Changes in Retailers, Businesses, Restaurants, and Organizations by District, FY 2018

A&E District	Retailers	Businesses	Restaurants	Organizations
Annapolis	0	5	0	0
Bel Air	3	3	2	0
Berlin	3	0	0	0
Bethesda	-3	12	2	5
Bromo Tower	1	2	2	1
Cambridge	2	9	2	0
Chestertown	6	2	-2	1
Cumberland	8	6	4	0
Denton	1	0	1	1
Elkton	0	1	1	0
Frederick	3	4	2	0
Frostburg	3	-1	-2	1
Gateway	3	0	-1	-1
Grantsville	1	0	0	0
Hagerstown	0	12	2	-1
Havre de Grace	1	8	1	2
Highlandtown	2	-1	1	-1
Leonardtwn	4	3	0	1
Oakland	-1	-1	-1	0
Salisbury	-1	1	1	0
Silver Spring	3	6	4	-1
Snow Hill	0	4	-1	0
Station North	0	2	1	4
Stevensville	0	0	0	0
Wheaton	2	3	7	2
Total	41	80	26	14

Sources: Maryland A&E Districts, MSAC, RESI

In FY 2018, Cumberland saw the greatest net gain in retailers, with eight additional stores added. Bethesda and Hagerstown experienced the largest increase in businesses, each netting at 12. Both Silver Spring and Cumberland reported a net gain of four restaurants, the highest of all districts. Bethesda reported the largest net increase in organizations, with five.

3.3 FY 2018 Challenges

Districts also provided narratives regarding the challenges that they faced during FY 2018. RESI categorized the information provided in these narratives based on previous years' groupings as well as trends seen in the data. Figure 4 describes how many districts reported each type of challenge.

Figure 4: Number of Districts Reporting Challenges by Type of Challenge, FY 2018

Challenge Type	Number of Districts	Percent of Total Districts
Funding	8	32.0%
Available and Affordable Space	7	28.0%
Staffing Issues	6	24.0%
Interagency Relationships	3	12.0%
Administration	3	12.0%
Other	11	44.0%

Sources: Maryland A&E Districts, MSAC, RESI

As seen in Figure 4, districts most commonly experienced funding challenges; issues related to funding often contributed to other types of challenges as well. Seven districts indicated challenges involving having enough available and affordable space to be used for businesses, housing, and/or venues. Three districts mentioned challenges specific to the administration of their districts, notably with the structure and attendance of the leadership committees. Three districts noted challenges related to their relationships with other government agencies, particularly with increased permits and bureaucracy that slows down district initiatives.

In addition to the challenges that aligned with defined categories, 11 districts discussed other challenges. Many of these issues related to events or challenges specific to an individual district. For example, a major arts festival took place this year near one district, diverting sponsors and distracting from the local arts council's own events. Other districts will be unable to continue certain events or have experienced issues with particular events that may adversely affect them in future years. Two districts specifically called out the tax incentives as being of limited or no use.

3.4 District Events and Festivals During FY 2018

Districts provided information regarding events and festivals that took place during FY 2018. RESI received and then cleaned these data for analysis. Figure 5 contains tabulations of events and festivals for FY 2018. Please note that not all districts provided information for all categories; attendance estimates were not provided for some events and festivals. Where possible, RESI estimated attendance levels based on data from prior years. Furthermore, events or festivals that were reported but did not occur during FY 2018 were excluded from the tabulations.

Figure 5: Events by District, FY 2018

A&E District	Events	Percent	Attendance
Annapolis	13	0.4%	37,800
Bel Air	52	1.6%	68,443
Berlin	16	0.5%	21,300
Bethesda	16	0.5%	23,500
Bromo Tower	2	0.1%	1,000
Cambridge	198	6.0%	20,024
Chestertown	8	0.2%	10,590
Cumberland	24	0.7%	2,562
Denton	16	0.5%	3,985
Elkton	14	0.4%	14,169
Frederick	25	0.8%	253,710
Frostburg	19	0.6%	4,250
Gateway	75	2.3%	15,696
Grantsville	10	0.3%	9,180
Hagerstown	21	0.6%	27,995
Havre de Grace	23	0.7%	105,260
Highlandtown	10	0.3%	6,773
Leonardtwn	18	0.5%	9,590
Oakland	24	0.7%	9,945
Salisbury	41	1.2%	63,351
Silver Spring	451	13.6%	100,470
Snow Hill	9	0.3%	1,475
Station North	2,187	65.8%	167,425
Stevensville	11	0.3%	1,450
Wheaton	43	1.3%	27,515
Total	3,326	100.0%	1,007,458

Sources: Maryland A&E Districts, MSAC, RESI

As seen in Figure 5, Maryland’s A&E Districts reported hosting 3,326 events with an estimated attendance of 1.0 million in FY 2018. Station North reported the largest number of events, with 2,187 over the course of the fiscal year. Frederick reported the highest attendance levels, with an estimated 253,710 visitors coming to its 25 events. Frederick’s largest event series was First Saturday, with reported attendance of 200,000.

Districts also provided information regarding festivals held within their boundaries during FY 2018. As with events, all data are self-reported, and not all districts provided estimated attendance totals. Figure 6 shows information regarding festivals in FY 2018.

Figure 6: Festivals by District, FY 2018

A&E District	Festivals	Percent	Attendance
Annapolis	5	3.5%	97,000
Bel Air	7	4.9%	61,000
Berlin	5	3.5%	14,000
Bethesda	3	2.1%	65,000
Bromo Tower	1	0.7%	3,000
Cambridge	12	8.4%	12,815
Chestertown	6	4.2%	22,300
Cumberland	1	0.7%	1,750
Denton	2	1.4%	10,250
Elkton	5	3.5%	8,147
Frederick	6	4.2%	22,000
Frostburg	6	4.2%	6,350
Gateway	7	4.9%	7,450
Grantsville	3	2.1%	8,500
Hagerstown	3	2.1%	7,837
Havre de Grace	3	2.1%	9,300
Highlandtown	3	2.1%	10,400
Leonardtwn	6	4.2%	31,650
Oakland	3	2.1%	23,700
Salisbury	1	0.7%	4,000
Silver Spring	39	27.3%	185,859
Snow Hill	6	4.2%	3,200
Station North	5	3.5%	227,750
Stevensville	3	2.1%	1,850
Wheaton	2	1.4%	600
Total	143	100.0%	845,708

Sources: Maryland A&E Districts, MSAC, RESI

Statewide, Maryland’s A&E Districts reported 143 festivals with 845,708 estimated attendees, as detailed in Figure 6. While Silver Spring reported the largest number of festivals in FY 2018, 39 festivals comprising 27.3 percent of the statewide total, Station North reported the highest total attendance in FY 2018 with 227,750 people at its five festivals. The biggest festival for Station North was Artscape, which reported an attendance of 200,000.³

³ Please note that Artscape extends beyond the borders of the Station North A&E District. This attendance count is for the portion of the festival that was held within the borders of the district.

3.5 District Assets

Maryland’s A&E Districts contain unique enterprises that attract visitors to the districts. These enterprises range in size and scope from galleries for local artists to ballet schools to concert venues. Figure 7 contains information regarding the number of enterprises by district.

Figure 7: Enterprises by District, FY 2018

A&E District	Enterprises	Percent	Attendance
Annapolis	60	10.1%	N/A
Bel Air	14	2.3%	2,918
Berlin	7	1.2%	61,000
Bethesda	25	4.2%	848,425
Bromo Tower	20	3.4%	269,500
Cambridge	14	2.3%	5,825
Chestertown	7	1.2%	35,250
Cumberland	19	3.2%	56,250
Denton	8	1.3%	4,700
Elkton	17	2.8%	34,988
Frederick	50	8.4%	N/A
Frostburg	22	3.7%	289,750
Gateway	48	8.0%	74
Grantsville	11	1.8%	32,100
Hagerstown	9	1.5%	672,518
Havre de Grace	26	4.4%	141,363
Highlandtown	14	2.3%	70,000
Leonardtwn	17	2.8%	32,584
Oakland	15	2.5%	27,181
Salisbury	19	3.2%	21,520
Silver Spring	84	14.1%	1,324,950
Snow Hill	8	1.3%	9,322
Station North	40	6.7%	N/A
Stevensville	12	2.0%	12,900
Wheaton	31	5.2%	7500
Total	597	100.0%	3,960,618

Sources: Maryland A&E Districts, MSAC, RESI

As seen in Figure 7, Maryland’s A&E Districts are home to 597 enterprises. With 84 enterprises, Silver Spring reported the largest number, followed by Annapolis, with 60. Silver Spring also reported the highest number of visitors for its enterprises, at over 1.3 million attendees. Bethesda reported the second-highest estimated attendance, at more than 0.8 million.

Districts provided information regarding these enterprises, as well as estimated attendance levels. In cases where a district did not provide an enterprise type, RESI grouped the enterprise

into one of the predefined categories. Figure 8 contains information regarding enterprises by type in Maryland’s A&E Districts.

Figure 8: Enterprises by Type in Maryland’s A&E Districts, FY 2018

Enterprise Type	Number	Percent	Attendance
Galleries/Co-ops	124	20.8%	257,441
Performance Venues	114	19.1%	1,054,714
Arts Organizations	89	14.9%	605,750
Arts Education	68	11.4%	294,489
Arts Suppliers/Services	76	12.7%	66,760
Museums	41	6.9%	96,384
Other	85	14.2%	1,560,500
Total	597	100.0%	3,936,038

Sources: Maryland A&E Districts, MSAC, RESI

Maryland’s A&E Districts contain 597 enterprises statewide. Galleries/co-ops are the most common type of enterprise, with 124 showrooms throughout the state. Of the defined enterprise types, performance venues attracted the highest level of reported participants, with nearly 1.1 million in estimated attendance.

In addition to a variety of enterprises, Maryland’s A&E Districts contain numerous public art works, ranging from sculptures to murals and mosaics. Figure 9 contains information regarding the number of reported public art works by district in FY 2018.

Figure 9: Public Art by District, FY 2018

District	Public Art Works	Percent
Annapolis	15	8.0%
Bel Air	22	11.7%
Berlin	0	0.0%
Bethesda	3	1.6%
Bromo Tower	0	0.0%
Cambridge	5	2.7%
Chestertown	0	0.0%
Cumberland	0	0.0%
Denton	0	0.0%
Elkton	6	3.2%
Frederick	14	7.4%
Frostburg	2	1.1%
Gateway	1	0.5%
Grantsville	1	0.5%
Hagerstown	1	0.5%
Havre de Grace	18	9.6%
Highlandtown	0	0.0%
Leonardtwn	2	1.1%
Oakland	1	0.5%
Salisbury	0	0.0%
Silver Spring	60	31.9%
Snow Hill	0	0.0%
Station North	2	1.1%
Stevensville	0	0.0%
Wheaton	35	18.6%
Total	188	100.0%

Sources: Maryland A&E Districts, MSAC, RESI

As seen above, Maryland’s A&E Districts reported a total of 188 public artworks in 16 districts. Silver Spring reported the plurality, with 60 works. Wheaton reported the second-highest total, with 35 works of public art.

A&E Districts were also asked to provide information regarding any housing that is designed for or marketed to artists. Figure 10 illustrates which districts reported artist housing as well as the number of units available.

Figure 10: Artist Housing by District, FY 2018

District	Artist Housing?	Number of Units
Annapolis	No	N/A
Bel Air	No	N/A
Berlin	No	N/A
Bethesda	No	N/A
Bromo Tower	Yes	108
Cambridge	No	N/A
Chestertown	Yes	1
Cumberland	No	N/A
Denton	Yes	1
Elkton	No	N/A
Frederick	No	N/A
Frostburg	No	N/A
Gateway	Yes	100
Grantsville	Yes	2
Hagerstown	Yes	4
Havre de Grace	No	N/A
Highlandtown	Yes	9
Leonardtown	Yes	70
Oakland	No	N/A
Salisbury	Yes	95
Silver Spring	Yes	232
Snow Hill	Yes	2
Station North	Yes	332
Stevensville	No	N/A
Wheaton	Yes	5
Total	13	961

Sources: Maryland A&E Districts, MSAC, RESI

The majority of Maryland’s A&E Districts, 13 out of 25, reported having housing available specifically for artists. Combined, these districts offer 961 units, the plurality of which are in districts that surround the Washington, D.C. metro area (100 in Gateway, 232 in Silver Spring, and five in Wheaton). With 332 available housing units, Station North reported the largest number for a single district.

As illustrated previously, A&E Districts contain a variety of enterprises and attractions. Figure 11 contains the occupancy rate for various types of real estate by district, as well as the average rate for districts that reported a positive occupancy rate. Please note that not every district has each type of real estate. “N/A” appears where districts did not report an occupancy rate.

Figure 11: Occupancy Rate by Type of Real Estate by District, FY 2018

A&E District	Storefront/ Commercial	Residential	Industrial/ Manufacturing	Mixed Use
Annapolis	95%	100%	N/A	95%
Bel Air	96%	99%	N/A	96%
Berlin	99%	100%	N/A	95%
Bethesda	95%	93%	N/A	95%
Bromo Tower	60%	80%	N/A	60%
Cambridge	75%	65%	100%	70%
Chestertown	80%	90%	N/A	95%
Cumberland	65%	90%	90%	70%
Denton	70%	85%	N/A	75%
Elkton	95%	90%	N/A	100%
Frederick	97%	97%	97%	95%
Frostburg	85%	95%	N/A	85%
Gateway	88%	100%	90%	86%
Grantsville	25%	70%	N/A	5%
Hagerstown	72%	90%	100%	67%
Havre de Grace	N/A	N/A	N/A	93%
Highlandtown	88%	95%	70%	95%
Leonardtwn	90%	90%	N/A	95%
Oakland	35%	60%	N/A	5%
Salisbury	90%	92%	N/A	77%
Silver Spring	93%	96%	97%	91%
Snow Hill	65%	10%	N/A	10%
Station North	40%	45%	10%	5%
Stevensville	97%	98%	N/A	100%
Wheaton	97%	90%	N/A	77%
Average	79%	84%	82%	73%

Sources: Maryland A&E Districts, MSAC, RESI

As seen above, the average of the occupancy rates by type of real estate range from 73 percent to 84 percent. While all districts reported occupancy rates for mixed-use real estate and nearly every district reported having storefront/commercial and residential spaces, only eight districts reported occupancy rates for industrial/manufacturing spaces. Berlin reported the highest occupancy rate for storefront/commercial real estate, with 99 percent of this space occupied. Annapolis and Gateway both indicated that their residential real estate was fully occupied, while Cambridge and Hagerstown indicated that their industrial/manufacturing space was fully occupied. Elkton and Stevensville reported that their mixed-use real estate was fully occupied in FY 2018.

3.6 Benefit Information

Benefits to A&E Districts include artist registries, artist relocation programs, tax abatement and credits, and social media/website features. Artists in A&E Districts are eligible for various benefits. Eleven of Maryland’s A&E Districts reported a total of 634 artists on official registries. Of these 634 total artists, 66 were registered in FY 2018. Figure 12 contains further information regarding registered artists at the district level in FY 2018. Please note that districts that do not maintain a registry are described with “0.”

Figure 12: Registered Artists by District, FY 2018

District	Number in Registry	Number Registered in FY 2018
Annapolis	0	0
Bel Air	48	2
Berlin	75	15
Bethesda	0	0
Bromo Tower	0	0
Cambridge	36	0
Chestertown	0	0
Cumberland	0	0
Denton	4	2
Elkton	15	0
Frederick	0	0
Frostburg	0	0
Gateway	213	0
Grantsville	0	0
Hagerstown	0	0
Havre de Grace	40	0
Highlandtown	0	0
Leonardtwn	73	1
Oakland	0	0
Salisbury	0	0
Silver Spring	38	41
Snow Hill	12	0
Station North	0	0
Stevensville	0	0
Wheaton	80	5
Total	634	66

Sources: Maryland A&E Districts, MSAC, RESI

Regardless of whether or not a district maintains a registry, districts reported estimated numbers of artists working within their boundaries in FY 2018, described in Figure 13.

Figure 13: Estimated Artists by District, FY 2018

District	Estimated Artists
Annapolis	230
Bel Air	79
Berlin	125
Bethesda	1,000
Bromo Tower	240
Cambridge	95
Chestertown	18
Cumberland	15
Denton	240
Elkton	345
Frederick	250
Frostburg	450
Gateway	685
Grantsville	16
Hagerstown	300
Havre de Grace	50
Highlandtown	250
Leonardtwn	74
Oakland	12
Salisbury	75
Silver Spring	50
Snow Hill	16
Station North	500
Stevensville	80
Wheaton	85
Total	5,280

Sources: Maryland A&E Districts, MSAC, RESI

As seen in Figure 13, Maryland’s A&E Districts have an estimated 5,280 artists creating within their boundaries. Bethesda and Gateway reported the highest number of artists, with 1,000 and 685 artists, respectively. No district reported having an artist relocation program during FY 2018.

Businesses in Maryland’s A&E Districts have a variety of tax incentives available to them. These include abatement of the Admission and Amusement Tax, property tax credits for arts-related

renovations, as well as other tax incentives.⁴ Figure 14 displays the number of businesses by districts that utilized tax incentives in FY 2018.

Figure 14: Businesses' Tax Incentive Utilization by District, FY 2018

District	Admissions and Amusement Tax Abatement		Property Tax Credits	
	Number	Percent	Number	Percent
Annapolis	2	5.6%	0	0.0%
Bel Air	0	0.0%	0	0.0%
Berlin	1	2.8%	0	0.0%
Bethesda	2	5.6%	0	0.0%
Bromo Tower	3	8.3%	0	0.0%
Cambridge	1	2.8%	0	0.0%
Chestertown	0	0.0%	0	0.0%
Cumberland	0	0.0%	2	28.6%
Denton	0	0.0%	0	0.0%
Elkton	0	0.0%	0	0.0%
Frederick	12	33.3%	0	0.0%
Frostburg	0	0.0%	0	0.0%
Gateway	3	8.3%	3	42.9%
Grantsville	1	2.8%	0	0.0%
Hagerstown	1	2.8%	0	0.0%
Havre de Grace	0	0.0%	0	0.0%
Highlandtown	0	0.0%	0	0.0%
Leonardtwn	2	5.6%	0	0.0%
Oakland	0	0.0%	0	0.0%
Salisbury	1	2.8%	0	0.0%
Silver Spring	2	5.6%	0	0.0%
Snow Hill	0	0.0%	0	0.0%
Station North	3	8.3%	1	14.3%
Stevensville	1	2.8%	1	14.3%
Wheaton	1	2.8%	0	0.0%
Total	36	100.0%	7	100.0%

Sources: Maryland A&E Districts, MSAC, RESI

As shown in Figure 14, 36 businesses in 15 districts utilized the Admissions and Amusement Tax abatement in FY 2018. The plurality of these businesses, 12 out of the 36, or 33.3 percent, were in Frederick. Bromo Tower, Gateway, and Station North each had three businesses that utilized

⁴ "A&E District Resources," Maryland State Arts Council, accessed February 12, 2019, <https://www.msac.org/node/62709>.

the tax incentive, which in total made up 24.9 percent. Four districts reported at total of seven businesses that took advantage of property tax credits.

In addition to the Admissions and Amusement Tax abatement and property tax credits explicitly included in the annual report, districts had the opportunity to highlight any other incentives available. RESI grouped these responses for the districts that reported additional incentives into the following categories: façade improvement assistance, loans, other tax credits or abatement, grants, other financial incentives, and non-financial incentives. Figure 15 provides information regarding these various incentives at the district level.

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Figure 15: Incentives Reported by A&E District, FY 2018

District	Other Incentives?	Façade Improvement	Loan	Other Tax Credit/Abatement	Grants	Other	Non-financial
Annapolis	Yes	No	No	No	No	No	Yes
Bel Air	Yes	Yes	Yes	Yes	No	No	Yes
Berlin	No	No	No	No	No	No	No
Bethesda	Yes	No	No	No	No	Yes	Yes
Bromo Tower	No	No	No	No	No	No	No
Cambridge	Yes	No	No	Yes	No	No	No
Chestertown	Yes	No	Yes	Yes	No	Yes	No
Cumberland	Yes	No	Yes	Yes	Yes	No	Yes
Denton	Yes	No	Yes	No	No	No	Yes
Elkton	Yes	No	No	No	No	Yes	No
Frederick	Yes	No	No	Yes	No	No	No
Frostburg	Yes	No	No	Yes	Yes	Yes	No
Gateway	Yes	Yes	No	Yes	No	No	No
Grantsville	Yes	Yes	No	Yes	Yes	No	Yes
Hagerstown	Yes	No	Yes	Yes	Yes	Yes	Yes
Havre de Grace	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Highlandtown	Yes	No	No	Yes	No	No	No
Leonardtwn	Yes	No	No	No	No	No	Yes
Oakland	Yes	No	No	Yes	Yes	Yes	Yes
Salisbury	Yes	No	Yes	Yes	No	No	Yes
Silver Spring	Yes	No	No	Yes	No	Yes	Yes
Snow Hill	Yes	No	Yes	Yes	No	Yes	No
Station North	Yes	No	No	Yes	No	No	No
Stevensville	Yes	No	Yes	No	Yes	Yes	No
Wheaton	Yes	No	No	Yes	No	Yes	Yes
Total	23	4	9	17	7	11	13

Sources: Maryland A&E Districts, MSAC, RESI

As shown in Figure 15, most districts reported additional incentives. The most common type of additional incentive was another type of tax credit or abatement, available in 17 districts. In addition, 13 districts reported non-financial incentives, including demographic and economic analysis, marketing support, and free parking.

A&E Districts also have access to various social media outlets to communicate with their communities. Figure 16 contains information regarding which communication tools are most frequently used.

Figure 16: Use of Communication Tools, FY 2018

Tool	Number	Percentage
Facebook	25	100.0%
Website	25	100.0%
Events Calendar	21	84.0%
Other	17	68.0%
Twitter	15	60.0%
Artist Registry	11	44.0%
Media Page	6	24.0%

Sources: Maryland A&E Districts, MSAC, RESI

All 25 of Maryland’s A&E Districts use Facebook and a website. The next-most-common tool is an online events calendar, which 21 districts use. Of the districts that reported “other” communication tools, the most frequently cited social media platform was Instagram, utilized by seven districts.

3.7 Public Funding

A&E Districts reported public funding received from the federal, state (both from MSAC and other state agencies), and local levels. Some districts also received in-kind support. Figures 17 through 22 describe funding that districts reported by type and source.

Figure 17: A&E Districts Receiving Federal Funding, FY 2018

A&E District	Federal Funding Type	Amount
Frederick	National Endowment for the Arts	\$50,000
	DNR – Keep America Beautiful	\$5,000
Denton	USDA – Rural Business Development Grant	\$30,000
Total		\$85,000

Sources: Maryland A&E Districts, MSAC, RESI

In FY 2018, two districts—Denton and Frederick—reported receiving a total of \$85,000 in federal grants. The National Endowment for the Arts awarded a grant to Frederick, which also received a “Keep America Beautiful” grant. Denton received funding from the United States Department of Agriculture (USDA).

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Figure 18: A&E Districts Receiving Funding from MSAC, FY 2018

MSAC Funding Type	District	Amount
Technical Assistance	Berlin	\$1,500
	Bromo Tower	\$2,500
	Cumberland	\$2,500
	Denton	\$2,300
	Frostburg	\$2,500
	Hagerstown	\$500
	Havre de Grace	\$2,500
	Leonardtwn	\$850
	Silver Spring	\$2,500
	Snow Hill	\$1,091
	Station North	\$2,500
Grants for Organizations	Gateway	\$5,500
	Hagerstown	\$17,961
Public Art	Chestertown	\$5,000
	Denton	\$3,386
	Gateway	\$5,000
	Hagerstown	\$5,000
	Havre de Grace	\$5,000
	Stevensville	\$5,000
Maryland Touring	Denton	\$3,073
Total		\$76,161

Sources: Maryland A&E Districts, MSAC, RESI

Fourteen districts reported receiving a combined total of \$76,161 from MSAC in FY 2018. The largest single award was a grant for an organization in Hagerstown, valued at \$17,961. Technical assistance was the most common type of funding that districts received, with 11 districts reporting a combined total of \$21,241 in awards.

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Figure 19: A&E Districts Receiving Other State Funding, FY 2018

State Funding Type	District	Amount
Maryland Main Street	Chestertown	\$10,000
	Denton	\$25,000
	Frederick	\$15,000
	Frostburg	\$16,500
Heritage Areas Authority/Planning	Denton	\$62,500
Capital Bond	Gateway	\$300,000
Other – Maryland Film Office	Bel Air	\$1,000
Other – DHCD	Berlin	\$50,000
	Chestertown	\$40,000
	Cumberland	\$50,000
	Cumberland	\$50,000
	Elkton	\$50,000
	Hagerstown	\$900,000
	Highlandtown	\$715,000
	Highlandtown	\$75,000
Other – MD Department of Natural Resources	Frederick	\$3,500
	Leonardtwn	\$115,000
Other – Community Legacy Grant	Gateway	\$50,000
	Gateway	\$20,000
Other – Clean Up Green Up Maryland	Station North	\$4,000
Total		\$2,552,500

Sources: Maryland A&E Districts, MSAC, RESI

Districts received a reported \$2.6 million from state agencies other than MSAC in FY 2018. “Other” awards from five different sources comprise the majority of this total; the Department of Housing and Community Development (DHCD) awarded \$900,000 to Hagerstown and a combined \$790,000 to Highlandtown. Of the defined state funding sources, Maryland Main Street was the most popular, with four districts receiving a combined total of \$66,500.

Figure 20: A&E Districts Receiving Local Funding, FY 2018

District	Local Funding Type	Amount
Annapolis	City of Annapolis	\$15,000
	BGE	\$10,000
	Arts Council of Anne Arundel County	\$8,000
	Inner West Street Association	\$7,000
Bel Air	Harford County Cultural Arts Board	\$6,050
Berlin	Worcester County Arts Council	\$900
Bromo Tower	Goldseker Foundation	\$50,000
	Downtown Partnership of Maryland	\$30,000
	Blaustein Foundation	\$12,500
	Broadway Across America	\$3,500
Chestertown	Kent County Arts Council	\$1,000
Denton	Eastern Shore Heritage, Inc.	\$2,500
Frederick	Ausherman Family Foundation	\$40,000
	Delaplaine Foundation	\$30,000
	Rotary Club of Carroll Creek	\$5,000
Gateway	Prince George's County CDBG	\$100,000
Hagerstown	Washington County Arts Council	\$1,500
Havre de Grace	Harford County Tourism	\$15,000
Leonardtwn	Harford County Cultural Arts Board	\$6,700
Leonardtwn	St. Mary's Arts Council	\$3,100
Salisbury	Community Foundation of the Eastern Shore	\$5,000
Snow Hill	Worcester County Arts Council	\$500
Station North	William Baker Memorial Fund	\$45,000
	Blaustein Foundation	\$15,000
Wheaton	We Art Wheaton Grants, Montgomery County	\$90,000
Total		\$503,250

Sources: Maryland A&E Districts, MSAC, RESI

Maryland's A&E Districts reported receiving a combined \$503,250 in local funding in FY 2018. With \$100,000 in local support, Gateway reported the plurality of these funds with the largest single award from a Prince George's County Development Block Grant (CDBG). Bromo Tower reported the second-highest level of local funding, at \$96,000 from four sources.

In addition to local funding, many districts receive operating support, as seen below.

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Figure 21: A&E Districts Receiving Operating Support, FY 2018

District	Provider	Dollar Amount
Bel Air	Town of Bel Air Economic Development Department	\$18,098
Bethesda	Bethesda Urban Partnership	N/A
Cambridge	Cambridge Economic Development Budget	\$500
Chestertown	SFW Foundation	\$25,000
Denton	Town of Denton	\$5,000
Elkton	Elkton Chamber & Alliance Inc.	N/A
	Ausherman Family Foundation	N/A
Frederick	The Baker Fund	N/A
	The Delaplaine Foundation	N/A
Frostburg	City of Frostburg	\$2,500
Gateway	MNCPPC Department of Parks and Recreation, Arts and Cultural Division	\$90,000
Grantsville	Town of Grantsville	N/A
Hagerstown	City of Hagerstown	\$453,000
Havre de Grace	City of Havre de Grace	\$5,000
Leonardtwn	Commissioners of Leonardtown	\$10,000
Oakland	Garrett County Arts Council	N/A
Salisbury	City of Salisbury	\$158,500
Silver Spring	Montgomery County	\$200,000
Snow Hill	Worcester County Tourism	\$37,000
Station North	Johns Hopkins University	\$15,000
	MICA	\$20,000
Stevensville	Queen Anne's County Economic and Tourism Development	\$5,000
Wheaton	Montgomery County	\$350,000
Total		\$1,394,598

Sources: Maryland A&E Districts, MSAC, RESI

As seen in Figure 21, nearly \$1.4 million in operating support was awarded to 20 of Maryland’s A&E Districts in FY 2018. Please note that this total is likely conservative, as not all districts reported dollar amounts for the operating support that they received. Of districts that reported funding amounts, Hagerstown reported the single highest award, at \$453,000, followed by Wheaton, at \$350,000.

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Figure 22: A&E Districts Receiving In-Kind Support, FY 2018

District	Provider	Type	Estimated Value
Annapolis	City of Annapolis	Rent	\$8,000
	Sir Speedy	Printing	\$1,000
Bel Air	Town of Bel Air Police and Public Works Departments	Staff time for events	\$5,000
	Town of Bel Air	Office space and services	\$3,000
Berlin	Salt Water Media	Discounted printing	\$750
	Town of Berlin	Barricades, public facilities, electric, office space/storage	N/A
Bethesda	BUP	Staffing	N/A
Cambridge	City of Cambridge	Economic development	\$7,000
Chestertown	Town of Chestertown	Office, meeting, and storage space; copy machine, phone	\$10,000
Denton	Town of Denton	Administrative support	\$13,000
	Town of Denton	Office space	\$1,500
Elkton	Margie Blystone	Volunteer time	\$8,700
Frederick	Rusty Huaver		\$48,000
	Ausherman Family Foundation	Rent	\$34,000
Frostburg	FrostburgFirst	Administrative support	\$16,500
	City of Frostburg	Office space, administrative support	\$6,000
Gateway	Hyattsville Community Development Corporation	Administrative support	\$12,706
	Hyattsville CDC	Internet hosting and other digital services	\$1,200
Grantsville	Cornucopia Café	Meeting space	\$1,200
	Garrett County Arts Council	Representation at MSAC Annual A&E meeting	\$500
Havre de Grace	City of Havre de Grace	Staff support	\$20,000
	City of Havre de Grace	Tourism and PR	\$3,000
Highlandtown	Creative Alliance	Staff time	\$50,000
	Southeast CDC	Staff time	\$50,000

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District	Provider	Type	Estimated Value
Leonardtwn	Commissioners of Leonardtown	Staffing, grant and report writing, office supplies and space, staffing for events and festivals	\$50,000
	Leonardtwn Business Association	Volunteers and event funding	\$14,350
Oakland	Garrett County Arts Council	Representation at MSAC Annual A&E meeting	\$500
	Garrett County Arts Council	Materials and meeting space	\$400
	Smoke 'n' Mirrors	Meeting space	\$100
Salisbury	WMDT 47 ABC	Advertising	\$8,000
	City of Salisbury	Office Space	\$7,200
	PKS Certified Public Accountants	Accounting services	\$6,000
	Decarlo Digital Copy Center	Printing	\$2,500
	Robinson's Family of Businesses	Printing	\$2,000
	Kacey Martin	Graphic design	\$1,500
	VP Shoes	Storage space	\$1,000
	How Sweet It Is	Supplies	\$800
	PAC-14	Advertising	\$500
	Matrice Interactive	Web hosting	\$200
Silver Spring	Montgomery County Silver Spring Regional Center	Office support, etc.	\$50,000
Snow Hill	Town of Snow Hill	Staffing	\$6,000
Station North	Steve Ziger and Elaine Asal	Time	N/A
Stevensville	Queen Anne's County Economic and Tourism Development	Staff support	\$17,000
Wheaton	Montgomery County	In-kind support	N/A
	Wheaton Urban District	In-kind support	N/A
Total			\$469,106

Sources: Maryland A&E Districts, MSAC, RESI

Districts also receive in-kind support from their communities, with an estimated value of \$469,106 in FY 2018. Please note that this total is a conservative estimate and likely understates the true impact of this support, since not all districts provided estimated values; furthermore, where districts provided funding ranges, RESI utilized the lower bound of the range. Values are rounded to the nearest dollar, so totals may not sum due to rounding. Types of in-kind support range from office and administrative assistance to events management to travel funding.

3.8 FY 2018 Goals and Work Plan

Some of the overarching and interrelated goals of the A&E Districts include the following:

- Expand public art projects.
- Increase marketing, branding, and awareness efforts, particularly with signage.
- Continue to support existing district activities while also cultivating new opportunities.
- Strengthen outreach to local students and community members.
- Provide opportunities for those involved with district management/operations to develop in their roles.

To meet these goals, each district has a work plan. A sample of such work plans includes the following action steps:

- “To complete the training program for the Executive Director and Past President on creating policies and procedures for the organization through Maryland Nonprofits.”
- “There is one public high school in [downtown] and two more in the greater [district] area. We have had a few opportunities to work with local art students by showing their artwork at [a gallery], but we would like to work with local students on either a temporary or permanent outdoor art exhibition in our downtown. Our goal is to support young artists as well as showcase their artwork to the community at large.”
- “Support local artists, art organizations and other providers of arts programming by gathering and disseminating resources, including grants, education and networking opportunities.”
- “Develop a comprehensive artist registry. To achieve this goal, the re-designation task force has begun work on an existing artist and arts-related enterprise inventory and will use it as a basis for a registry.”
- “Build dynamic, accessible and low tech analog and digital platforms to help connect people to venues and resources in the District.”
- “Complete 3 public art projects and develop marketing tools to highlight the 9 public art installations in the district.”
- “Continue diverse programming...[while being] in the planning stages of two new A&E District events.”

3.9 MSAC Technical Assistance

MSAC convenes the A&E Districts annually and offers them technical assistance. Figure 23 totals the types of technical assistance requested by districts.

Figure 23: Technical Assistance Requested, FY 2018

Type of Assistance	Number	Percentage ⁵
Funding Opportunities	10	40.0%
Marketing	10	40.0%
Networking w/ Other Districts	8	32.0%
Board Development	1	4.0%
Other	22	88.0%

Sources: Maryland A&E Districts, MSAC, RESI

Of the list provided, the A&E Districts would most like to obtain assistance with funding opportunities, with 40.0 percent indicating that funding opportunities and marketing assistance would be beneficial to their A&E Districts. Nearly as many districts indicated that they could benefit from additional networking opportunities with other districts.

Twenty-two districts indicated some other type of assistance that would be helpful to their district. Overall themes include the following:

- Assistance with community and artist engagement,
- Help completing state tax forms,
- Site visits and/or case studies of successful programs, and
- Professional development for individuals who help to operate A&E Districts as well as for artists/community members.

4.0 Conclusion

There was a plethora of activity in Maryland’s A&E Districts in FY 2018. In addition to 162 new capital projects that were initiated or completed, the districts statewide reported a net increase of 41 retailers, 80 businesses, 26 restaurants, and 14 organizations. The 1,139 events that took place within the districts’ borders attracted an estimated 840,033 attendees, while 143 festivals had an estimated 845,708 in attendance. Enterprises such as galleries/co-ops, performance venues, museums, arts education groups, arts organizations, arts suppliers/services, and others encouraged nearly 4.0 million people to visit A&E Districts. Furthermore, districts reported that 188 works of public art were available for citizens to enjoy.

The majority of districts offer some type of housing for artists and have 961 units for artists. Some districts maintain artist registries; of the 634 artists registered, 66 registered in FY 2018. In total, Maryland’s A&E Districts estimate that 5,280 artists work within their borders.

Statewide, 36 businesses within A&E Districts have taken advantage of the Admissions and Amusement Tax abatement program, while seven businesses have utilized property tax credits. Other incentives that A&E Districts reported included façade improvement, loans, grants, other tax credits/abatement programs, and non-financial incentives. Districts use a variety of

⁵ The values shows are a percent of the 25 districts responding to the given question, not the total number of responses.

communication tools, most commonly Facebook and websites, to share information with their communities.

Maryland's 25 A&E Districts reported receiving public funding at the federal, state, and local levels, exceeding \$3.2 million. Districts also received operating support and in-kind support, conservatively valued at approximately \$1.4 million and \$469,106, respectively.

In general, district goals include expanding public art projects; increasing marketing, branding, and awareness in districts; strengthening current activities while cultivating new opportunities; conducting outreach with students and the community; and engaging in professional development. Districts have actionable work plans to help achieve these goals. Outside of identifying funding opportunities, districts feel that marketing and networking with other districts would be the most beneficial forms of technical assistance.

Maryland's A&E Districts provide cultural and creative opportunities throughout the state, enriching the lives of Maryland residents. These districts also support local economies and contribute to thriving communities.

5.0 References

“A&E District Resources.” Maryland State Arts Council. Accessed February 12, 2019.
<https://www.msac.org/node/62709>.

“Arts and Entertainment Districts.” Maryland State Arts Council. Accessed February 12, 2019.
<https://www.msac.org/programs/arts-entertainment-districts>.

Appendix A—Maryland Arts and Entertainment District Annual Report

MARYLAND STATE ARTS COUNCIL

**FY 2018
ARTS & ENTERTAINMENT DISTRICTS
ANNUAL REPORT
DEADLINE: NOVEMBER 17, 2017**



CELEBRATING
50 YEARS OF SERVICE
TO THE ARTS

Maryland State Arts Council Part of the Maryland Department of Commerce



Individuals who do not use conventional print may contact the Maryland State Arts Council to obtain this publication in an alternate format. 410-767-6555 or msac.commerce@maryland.gov



For individuals who are deaf or hard-of-hearing.
TTY: Maryland Relay 1-800-735-2258 or 711

This publication is available as a PDF file on the MSAC website: www.msac.org.

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MARYLAND STATE ARTS COUNCIL

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Boyd K. Rutherford, Lt. Governor
R. Michael Gill, Secretary of Commerce
Ben Wu, Deputy Secretary of Commerce

Maryland State Arts Councilors

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Barbara Bershon, *Vice-Chair*, St. Mary's County
Joan Lyon, *Secretary-Treasurer*, Garrett County

Carole Alexander, Anne Arundel County
Aileen Carlucci, Anne Arundel County
Alex Castro, Kent County
Anthony Cornwell, Allegany County
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Doug Mann, Anne Arundel County
John Rasmussen, Montgomery County
Robinson S. Rowe, Montgomery County
Carol Trawick, Montgomery County
Gary Vikan, Baltimore City
Delegate Alonzo Washington, Prince George's County
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Christina Mullins
Okeena Stephenson
Christine Stewart

ANNUAL REPORT PROCEDURE

Per enabling legislation, all Maryland Arts and Entertainment Districts are required to submit reports to MSAC on an annual basis.

- FY 2018 annual reports must be submitted in eGRANT no later than 5:00 PM on November 17, 2017. **You must complete all required fields, click on the Submit My Data button, and eGRANT must accept your annual report by 5:00 PM on November 17, 2017 to meet the deadline.** You will receive an email from eGRANT stating that your annual report was successfully submitted.

IF YOU DO NOT SUCCESSFULLY SUBMIT YOUR FINAL REPORT BY 5:00 PM ON NOVEMBER 17, 2017, YOU MUST CONTACT THE A&E PROGRAM DIRECTOR.

- Technical support for eGRANT is available during regular office hours, 8:30 AM through 5:00 PM, Monday through Friday. Please direct eGRANT questions to Christina Mullins, MSAC Management Associate, at 410-767-8851 or christina.mullins@maryland.gov.

In order to submit, the A&E District must agree to use an electronic signature (see Section IX).

Maryland Arts and Entertainment Districts Survey Analysis FY 2018
RESI of Towson University

MSAC STAFF USE ONLY
AED 2017/_____

ARTS & ENTERTAINMENT DISTRICTS ANNUAL REPORT FY 2018
DEADLINE: NOVEMBER 17, 2017, 5:00 PM

THIS ANNUAL REPORT MUST BE COMPLETED IN EGRANT
PLEASE REFER TO THE "FINAL REPORT PROCEDURE" SECTION ON PAGE 4
FOLLOW INSTRUCTIONS BELOW WHEN FORMATTING RESPONSES

ANSWER ALL QUESTIONS AS THEY PERTAIN TO THE REPORTING PERIOD:
JULY 1, 2016 - JUNE 30, 2017

GENERAL INFORMATION

District Name:	
County:	Year Authorized:
Re-Designation Date (if completed):	Expansion Date (if granted):
Re-Designation Due:	Total Acreage:
Managing Entity:	
Tax Exempt Number:	
Website:	
A&E DISTRICT PRIMARY CONTACT PERSON	BOARD CHAIR/MANAGEMENT TEAM CHAIR
Name:	Name:
Title:	Title:
Address:	Address:
City:	City:
State: MD	State: MD
Zip Code:	Zip Code:
Phone:	Phone:
Mobile:	Mobile:
Email:	Email:
Fax:	Fax:

Stakeholders: List your district’s stakeholders and partners, including a contact name and email address for each entity.

Stakeholders may include your district’s County Arts Council, Local Tourism Office, Community Development Corporation, Downtown Partnership, Chamber of Commerce, Major Arts Venues, Arts Organizations you collaborate with, etc.

Provide your response in a list in the following format:
Stakeholder/Partner; Contact Name; E-Mail Address

*Stakeholder/Partner; Contact Name; E-Mail Address
(etc...)*

**ANSWER ALL QUESTIONS AS THEY PERTAIN TO THE REPORTING PERIOD:
FY 2018 (JULY 1, 2016 - JUNE 30, 2017)**

SECTION I: DISTRICT OVERVIEW

- A. Provide a narrative overview of your district’s accomplishments during the reporting period.

(Maximum 8000 characters, including spaces. Suggested minimum length 3000 characters.)

Overall, this response should illustrate district accomplishments within the reporting period. Refer to the list below and include brief descriptions for any items that pertain to your district.

- new initiatives (*e.g. strategic planning, marketing campaigns, funding secured, management changes, partnerships/collaborations, signage, etc.*)
- significant events and festivals occurring within the district
- new public art projects within the district
- new capital projects within the district
- new or significant retailers, businesses, and restaurants within the district
- activities of significant arts organizations or arts-related businesses
- changes in district management and staffing

In addition, please reference the district’s goals listed in Section VIII of your previous year’s annual report, reporting on district progress toward the stated goals and any new plans or goals developed or implemented since the last report.

- B. Provide a narrative overview of challenges that the district faced during the reporting period.

(Maximum 8000 characters, including spaces. Suggested minimum length 2000 characters.)

MSAC uses responses to Section I, questions A and B to inform program development, report to State officials, and provide technical assistance to districts. The A&E Districts Program Advisory Committee also reviews these and other parts of this report to select Outstanding Achievement awardees.

- C. How many capital projects were initiated, in process, or completed in the district during the reporting period? If none, enter 0.

Provide a list of all capital projects initiated, in process, or completed within the district during the reporting period. Include A&E District projects as well as those undertaken in the district by other organizations, developers, or enterprises.

Include the name or address, CP type (see below), and phase at the end of the reporting period (see below) of each project in the following format:

*Project Name/Address; CP type; Number of Units; Phase
Project Name/Address; CP type; Number of Units; Phase
Etc...*

CP Type: Residential, Commercial, Mixed-Use, Industrial, Artist Housing; Other (include as many as pertain)

Phase: Initiated, In Process, Completed

- D. How many new retailers opened in the district during the reporting period? If none, enter 0.

Provide a list of all retailers that opened in the district during the reporting period. For the purposes of this report, retailers include businesses that sell goods, whether arts-related or not.

Include each retailer's name, industry (see below), and if available the number of full and part-time jobs employed by the retailer in the following format:

Retailer Name; Retailer Industry; #FT; #PT

Retailer Name; Retailer Industry; #FT; #PT

Etc...

Retailer Industry: General, Specialty (e.g. art supplies, sporting goods, books, music), Clothing, Food/Beverage, Health (e.g. drug stores), Other.

- E. How many new businesses opened in the district during the reporting period? If none, enter 0.

Provide a list of all businesses (other than retailers and restaurants) that opened in the district during the reporting period.

Include each business' name, industry (see below), and if available the number of full and part-time jobs employed by the business in the following format:

Business Name; Business Industry; #FT; #PT

Business Name; Business Industry; #FT; #PT

Etc...

Business Industry: Accommodations (e.g. hotels, b&bs, etc.), Arts-Related, Attraction (specify Museum, Historical Site, Amusement, etc.), Education, Financial, Fitness, Medical, Real Estate, Other.

- F. How many new restaurants opened in the district during the reporting period? If none, enter 0.

Provide a list of all restaurants that opened in the district during the reporting period.

Include each restaurant's name, whether it provides full, counter, or bar service, and if available the number of full and part-time jobs employed by the restaurant in the following format:

*Restaurant Name; Full/Counter/Bar; #FT; #PT
Restaurant Name; Full/Counter/Bar; #FT; #PT
Etc...*

- G. How many organizations newly located in the district during the reporting period? If none, enter 0.

Provide a list of all organizations that opened a physical office or space in the district during the reporting period. Organizations may include not-for-profit arts or service organizations and any other organizations not included in any of the categories above.

Include each organization's name, type (see below) and if available the number of full and part-time jobs employed by the organization in the following format:

*Organization Name; Org Type; #FT; #PT
Organization Name; Org Type; #FT; #PT
Etc...*

Org type: Arts-Related, Not-For-Profit, Community, Other (include all types that pertain)

SECTION II: CLOSINGS

- A. How many retailers closed in the district during the reporting period? If none, enter 0.

Provide a list of all retailers that closed in the district during the reporting period. For the purposes of this report, retailers include businesses that sell goods, whether arts-related or not.

Include each retailer's name, industry (see below) and if available the number of full and part-time jobs lost because of the retailer's closing in the following format:

*Retailer Name; Retailer Industry; #FT; #PT
Retailer Name; Retailer Industry; #FT; #PT
Etc...*

Retailer Industry: General, Specialty (e.g. art supplies, sporting goods, books, music), Clothing, Food/Beverage, Health (e.g. drug stores), Other.

- B. How many businesses closed in the district during the reporting period? If none, enter 0.

Provide a list of all businesses (other than retailers and restaurants) that closed in the district during the reporting period.

Include each business' name, industry (see below), and if available the number of full and part-time jobs lost because of the business' closing in the following format:

*Business Name; Business Industry; #FT; #PT
Business Name; Business Industry; #FT; #PT
Etc...*

Business Industry: Accommodations (e.g. hotels, b&bs, etc.), Arts-Related, Attraction (specify Museum, Historical Site, Amusement, etc.), Education, Financial, Fitness, Medical, Real Estate, Other.

- C. How many restaurants closed in the district during the reporting period? If none, enter 0.

Provide a list of all restaurants that closed in the district during the reporting period.

Include each restaurant's name, whether it provided full, counter, or bar service, and if available the number of full and part-time jobs lost because of the restaurant's closing in the following format:

Restaurant Name; Full/Counter/Bar; #FT; #PT

Restaurant Name; Full/Counter/Bar; #FT; #PT

Etc...

- D. How many organizations closed or moved outside the district during the reporting period? If none, enter 0.

Provide a list of all organizations that closed a physical office or space in the district during the reporting period. Organizations may include not-for-profit arts or service organizations and any other organizations not included in any of the categories above.

Include each organization's name, type (see below) and if available the number of full and part-time jobs lost because of the organization's closing in the following format:

Organization Name; Org Type; #FT; #PT

Organization Name; Org Type; #FT; #PT

Etc...

Org type: Arts-Related, Not-For-Profit, Community, Other (include all that pertain)

SECTION III: DISTRICT EVENTS AND FESTIVALS

A. How many events occurred within the district during the reporting period?

Provide a list of all public events that occurred within the district during the reporting period. Include events presented by district management as well those presented by other organizations or enterprises.

Include the event's name, date(s), number of occurrences during the reporting period, estimated total attendance (total for all occurrences during the reporting period), and event type (see below). Mark with an asterisk () events that took place for the first time during the reporting period. Please use the following formats:*

For new events:

**Event Name; Date(s); Number of Occurrences; Estimated Total Attendance; Type
*Event Name; Date(s); Number of Occurrences; Estimated Total Attendance; Type
Etc...*

For reoccurring/annual events:

*Event Name; Date(s); Number of Occurrences; Estimated Total Attendance; Type
Event Name; Date(s); Number of Occurrences; Estimated Total Attendance; Type
Etc...*

Event Type: Community, Culture, Film, Fine Art, Food, Holiday, Performing Arts, Other

B. How many festivals occurred within the district during the reporting period?

Provide a list of all public festivals that occurred within the district during the reporting period. Include festivals presented by district management as well those presented by other organizations or enterprises.

Include the festival's name, date(s), number of occurrences during the reporting period, estimated total attendance (total for all occurrences during the reporting period), and festival type (see below). Mark with an asterisk () festivals that were presented for the first time during the reporting period. Please use the following formats:*

For new festivals:

**Festival Name; Date(s); Number of Occurrences; Estimated Total Attendance; Type
*Festival Name; Date(s); Number of Occurrences; Estimated Total Attendance; Type
Etc...*

For reoccurring/annual festivals:

*Festival Name; Date(s); Number of Occurrences; Estimated Total Attendance; Type
Festival Name; Date(s); Number of Occurrences; Estimated Total Attendance; Type
Etc...*

Festival Type: Community, Culture, Film, Fine Art, Food, Holiday, Performing Arts, Other

SECTION IV: DISTRICT ASSETS

A. DISTRICT ARTS AND ENTERTAINMENT ENTERPRISES

Provide a list of all arts-related enterprises within the district by type.

Enter each enterprise once under the appropriate enterprise type. Omit any types that do not apply. Enter an enterprise under "Other" if it does not fit any of the first seven types.

Enterprise Types: Galleries/Co-ops; Performance Venues; Museums; Arts Organizations; Arts Education Organizations; Public Art Pieces; Art Suppliers/Services; Other

For each type, include the name and annual attendance/patronage/visitation of each enterprise in the following format:

Galleries/Co-ops

Name; Estimated Total Annual Attendance/Patronage/Visitation

Name; Estimated Total Annual Attendance/Patronage/Visitation

Etc...

Performance Venues

Name; Estimated Total Annual Attendance/Patronage/Visitation

Name; Estimated Total Annual Attendance/Patronage/Visitation

Etc...

ETC...

Note: For those organizations that perform, exhibit, or provide services outside of the district, only include attendance that occurs within the district in your estimate.

B. ARTIST HOUSING

Provide a list of housing in the district that is built for or marketed to artists. Include affordable housing and any explanatory information as necessary.

Include name or address, type (see below) and number of units in the following format:

Name/Address; Housing Type; Number of Units

Name/Address; Housing Type; Number of Units

Etc.

Housing Type: Artist; Affordable; Market-rate; Apartment; Condominium; Other (include all that pertain)

C. OCCUPANCY RATE

Estimate the percentage of occupied real estate at the end of the current reporting period for each type of building stock in the district:

Storefront/Commercial	_____	%	<input type="checkbox"/> N/A
Residential	_____	%	<input type="checkbox"/> N/A
Industrial/Manufacturing	_____	%	<input type="checkbox"/> N/A
Mixed Use*	_____	%	<input type="checkbox"/> N/A

**Mixed Use is defined as a combination of land uses on the same site. Occupancy for this report can be estimated based on information from local real estate or licensing offices or best estimates based on district manager knowledge of the district.*

SECTION V: DISTRICT BENEFIT INFORMATION

- A.** Does the district maintain an artist registry? Yes/No

What is the total number of registered artists working in the district?

How many artists registered during the reporting period?

- B.** Estimate the total number of artists working in the district.

This estimate should include all registered artists (if the district maintains a registry) and an estimate of all artists regularly working within the district during the reporting period.

- C.** Does the district have an artist relocation program? Yes/No

How many artists relocated to the district during the reporting period as a result of the program?

- D.** How many businesses in the district take advantage of the Admission and Amusement Tax abatement? If none, enter 0.

Provide a list all businesses taking advantage of the abatement.

- E.** How many property tax credits were applied for during the reporting period?

Provide a list of property addresses for which property tax credits applications were submitted.

To confirm whether or not a construction project applied for A&E property tax credits, contact the tax office for your county, city, or town. County contact information can be found at <http://dat.maryland.gov/realproperty/Pages/Local-Tax-Billing-Collection-Offices.aspx>. Contact the Program Director for help finding this information.

- F.** Other than the A&E tax incentives, list all additional incentives available in the district.

List all incentives available within the district that are offered by state, county, or local government, by business groups, or through designations that overlap the A&E District.

- G.** Communication tools: check all that apply.

Facebook

Twitter

Website

Media page

On-line events calendar

Artist registry

Other – specify:

SECTION VI: DISTRICT FUNDING

REPORT FUNDING APPLIED FOR OR RECEIVED FOR DISTRICT PROJECTS OR OPERATIONS ONLY

Enter 0 in Award/Grant Amount if an application was submitted but funding was not awarded.

- A.** Indicate any federal or national funding applications submitted and provide grant/award amounts received for district projects or operations during the reporting period.

ENTITY	APPLICATION SUBMITTED	AWARD/GRANT AMOUNT
National Endowment for the Arts	<input type="checkbox"/> Yes	\$ _____
National Trust for Historic Preservation	<input type="checkbox"/> Yes	\$ _____
ArtPlace America	<input type="checkbox"/> Yes	\$ _____
Other – Specify:	<input type="checkbox"/> Yes	\$ _____

- B.** Indicate all Maryland State Arts Council applications submitted and provide grant amounts received for projects undertaken by the district during the reporting period.

MSAC PROGRAM	APPLICATION SUBMITTED	AWARD/GRANT AMOUNT
Technical Assistance	<input type="checkbox"/> Yes	\$ _____
Grants for Organizations	<input type="checkbox"/> Yes	\$ _____
Public Art	<input type="checkbox"/> Yes	\$ _____
Maryland Touring	<input type="checkbox"/> Yes	\$ _____
Other – Specify:	<input type="checkbox"/> Yes	\$ _____

- C.** Indicate any other state funding applied for or awarded for district projects or operations during the reporting period.

ENTITY	APPLICATION SUBMITTED	AWARD/GRANT AMOUNT
Maryland Main Street	<input type="checkbox"/> Yes	\$ _____
Heritage Areas Authority/Planning	<input type="checkbox"/> Yes	\$ _____
Department of Transportation	<input type="checkbox"/> Yes	\$ _____
Department of Planning	<input type="checkbox"/> Yes	\$ _____
Capital Bond	<input type="checkbox"/> Yes	\$ _____
Other – Specify:	<input type="checkbox"/> Yes	\$ _____

- D.** Indicate any local awards/grants applied for or awarded for district projects or operations during the reporting period.

Maryland Arts and Entertainment Districts Survey Analysis FY 2018

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ENTITY	APPLICATION SUBMITTED	AWARD/GRANT AMOUNT
_____	<input type="checkbox"/> Yes	\$ _____
_____	<input type="checkbox"/> Yes	\$ _____
_____	<input type="checkbox"/> Yes	\$ _____

- E.** If your district receives direct operating support, indicate who provides the operating support and how much was provided during the reporting period.

Please enter only direct operating support provided to the district. All grants applied for and received, even if reoccurring, should be entered in A-D above.

Include the name of each entity giving support, the total dollar amount of the support given by the entity during the reporting period, and the purpose of the support in the following format:

*Entity; \$Amount; Purpose
Entity; \$Amount; Purpose
Etc...*

- F.** If your district receives in-kind support, (e.g. office space, administrative support) indicate who provides the in-kind support, the type of support, and the estimated value.

Include the name of each entity giving in-kind support, the type of support (time, space, materials, discounted services, etc.), and the estimated total dollar amount of the support given by the entity during the reporting period in the following format:

*Entity; Type; Estimated \$Amount
Entity; Type; Estimated \$Amount
Etc...*

SECTION VII: GOALS FOR CURRENT FISCAL YEAR

- A. Briefly outline your district’s goals for the current fiscal year and your plans for achieving those goals. Include mention of any anticipated changes in district management or funding, new initiatives or strategies, new events or festivals, and any major capital or public art projects planned.

(Maximum 8000 characters, including spaces. Suggested minimum length 2000 characters.)

SECTION VIII: MSAC TECHNICAL ASSISTANCE

- A. Let us know what type of technical assistance MSAC could provide beyond funding that would serve to strengthen your district and help you achieve the goals listed above.

Please include topics you feel would be most relevant for annual professional development days and any other resources or ideas that would serve your district.

SECTION IX. CERTIFICATION

- The A&E District Representative agrees to complete and submit this application by electronic means, including the use of an electronic signature.

Name _____
Title _____
Date _____

- Checking this box verifies that the name typed above is authorized to sign this Maryland State Arts Council A&E Districts Annual Report on behalf of the A&E District and certifies that all information contained in this report is true and accurate to the best of the signatory’s knowledge. Checking this box verifies that the applicant agrees to complete and submit this report by electronic means, including the use of an electronic signature.

Appendix B—Data Limitations

Maryland’s A&E Districts are expected to complete and provide annual reports to MSAC. These reports include questions regarding accomplishments, establishment openings and closings, challenges, events and festivals including estimated attendance figures, district enterprises, district assets and benefits, public funding, and goals/work plans to achieve those goals. MSAC also asks that districts provide information regarding technical assistance that they would like to receive. Districts submitted these reports to MSAC for FY 2018, which MSAC then provided to RESI for tabulation and analysis.

While each district received an identically formatted annual report template, districts interpreted questions differently and provided varying information. Furthermore, not all districts completed all questions. Additionally, for some open-ended questions, RESI felt that the information provided would be more correctly captured in a different question and therefore re-categorized the response. For this reason, these tabulations should be seen as an estimate; where necessary, RESI utilized conservative estimates.

END OF DOUCMENT