

Maryland Arts and Entertainment District Survey Analysis FY 2017

Prepared for
Maryland State Arts Council

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Table of Contents

Table of Figures.....	3
1.0 Executive Summary.....	4
1.1 Project Objective	4
1.2 Summary of Findings.....	4
2.0 Introduction	6
3.0 Survey Analysis.....	6
3.1 FY 2017 Accomplishments	6
3.2 Closings.....	8
3.3 FY 2017 Challenges.....	11
3.4 District Events and Festivals During FY 2017	12
3.5 District Assets	14
3.6 Benefit Information.....	19
3.7 Public Funding	25
3.8 FY 2017 Goals and Work Plan	32
3.9 MSAC Technical Assistance	32
4.0 Conclusion.....	33
5.0 References	35
Appendix A—Maryland Arts and Entertainment District Annual Report.....	36
Maryland State Arts Councilors	38
MSAC Staff	38
Appendix B—Data Limitations.....	52

Table of Figures

Figure 1: New Entities by District, FY 2017	7
Figure 2: Closures by A&E District, FY 2017	9
Figure 3: Net Changes in Retailers, Businesses, Restaurants, and Organizations by District, FY 2017	11
Figure 4: Number of Districts Reporting Challenges by Type of Challenge, FY 2017	12
Figure 5: Events by District, FY 2017	13
Figure 6: Festivals by District, FY 2017	14
Figure 7: Enterprises by District, FY 2017	15
Figure 8: Enterprises by Type in Maryland’s A&E Districts, FY 2017	16
Figure 9: Public Art by District, FY 2017	17
Figure 10: Artist Housing by District, FY 2017	18
Figure 11: Occupancy Rate by Type of Real Estate by District, FY 2017	19
Figure 12: Registered Artists by District, FY 2017	20
Figure 13: Estimated Artists by District, FY 2017	21
Figure 14: Businesses’ Tax Incentive Utilization by District, FY 2017	22
Figure 15: Incentives Reported by A&E District, FY 2017	24
Figure 16: Use of Communication Tools, FY 2017	25
Figure 17: A&E Districts Receiving Federal Funding, FY 2017	25
Figure 18: A&E Districts Receiving Funding from MSAC, FY 2017	26
Figure 19: A&E Districts Receiving Other State Funding, FY 2017	27
Figure 20: A&E Districts Receiving Local Funding, FY 2017	28
Figure 21: A&E Districts Receiving Operating Support, FY 2017	30
Figure 22: A&E Districts Receiving In-Kind Support, FY 2017	31
Figure 23: Technical Assistance Requested, FY 2017	33

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 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).

1.1 Project Objective

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 for FY 2017. It is important to note that all data are self-reported by the A&E districts. As a result, some figures may be overestimated or underestimated.

1.2 Summary of Findings

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

- There were a total of
 - 128 new capital projects,
 - 107 new retailers,
 - 118 new businesses,
 - 80 new restaurants, and
 - 20 new organizations.
- Despite various business closures, the number of new openings was great enough to net
 - 45 new retailers,
 - 81 new businesses,
 - 45 new restaurants, and
 - 1 organization.
- Challenges that Maryland's A&E Districts faced generally fall into categories such as administrative, funding, technology, and "others," with many of these obstacles overlapping categories.
- The 895 events and 101 festivals attracted an estimated 676,091 and 499,121 attendees, respectively.
- The 555 reported enterprises within Maryland's A&E Districts, including galleries/co-ops, performance venues, arts organizations, arts suppliers/services, arts education, museums, and "other," attracted an estimated attendance of over 3.7 million individuals.
- Maryland's A&E Districts reported that 159 works of public art are available for visitors to enjoy.

¹ "Arts & Entertainment Districts," Maryland State Arts Council, accessed September 6, 2018, <https://www.msac.org/programs/arts-entertainment-districts>.

- Fifteen districts reported that they have housing specifically for artists, with 1,117 units available.
- Twelve districts maintain artist registries and have 694 registered artists; overall, the 24 districts estimate that there are 4,813 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.
- Four districts received federal funding, totaling \$130,000.
- Fourteen districts reported receiving funding from MSAC, totaling \$68,732.
- Other reported state funding came from the following sources:
 - Maryland Main Street—\$108,600;
 - Heritage Areas Authority/Planning—\$10,125;
 - The Department of Transportation—\$16,800;
 - Capitol Bond—\$30,000;
 - The Maryland Film Office—\$1,000;
 - The Department of Housing and Community Development—\$358,885;
 - The Maryland Environmental Trust—\$5,000;
 - The Baltimore Regional Neighborhood Initiative—\$225,000; and
 - The Baltimore National Heritage Area—\$5,000.
- Local funding awards, often from arts councils or municipalities, totaled \$622,468.
- Districts also received operational and in-kind support, valued at roughly \$1.4 million and \$400,000, respectively.
- Some of the overarching goals of the A&E districts include the following:
 - To expand public art projects;
 - To increase marketing and/or branding efforts, particularly with signage; and
 - To encourage relocation of galleries, art-related businesses, and retail businesses into the districts.
- 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 and marketing.

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 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 seeks an analysis of the data from the annual report distributed to each of the A&E Districts. The purpose of this survey is to collect and analyze district-specific data for FY 2017. The Regional Economic Studies Institute (RESI) of Towson University has tabulated and analyzed this survey data to provide MSAC with a comprehensive survey analysis for FY 2017. 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 are 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 24 A&E Districts within Maryland during FY 2017 received and completed the annual report. MSAC provided these reports to RESI, who then collated and analyzed them for MSAC. 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 2017 Accomplishments

In the annual report, districts were asked to highlight various accomplishments during FY 2017, including new capital projects initiated or completed during the FY, 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 September 6, 2018, <https://www.msac.org/programs/arts-entertainment-districts>.

Maryland Arts and Entertainment Districts Survey Analysis FY 2017
RESI of Towson University

Figure 1: New Entities by District, FY 2017

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	0	0.0%	1	0.9%	0	0.0%	1	1.3%	0	0.0%
Bel Air	0	0.0%	4	3.7%	5	4.2%	2	2.5%	0	0.0%
Berlin	1	0.8%	5	4.7%	2	1.7%	2	2.5%	0	0.0%
Bethesda	6	4.7%	8	7.5%	16	13.6%	11	13.8%	5	25.0%
Bromo	2	1.6%	3	2.8%	2	1.7%	8	10.0%	0	0.0%
Cambridge	7	5.5%	2	1.9%	1	0.8%	2	2.5%	1	5.0%
Chestertown	2	1.6%	8	7.5%	2	1.7%	1	1.3%	2	10.0%
Cumberland	18	14.1%	7	6.5%	2	1.7%	0	0.0%	1	5.0%
Denton	3	2.3%	1	0.9%	2	1.7%	1	1.3%	0	0.0%
Elkton	2	1.6%	0	0.0%	1	0.8%	1	1.3%	1	5.0%
Frederick	6	4.7%	19	17.8%	10	8.5%	3	3.8%	1	5.0%
Frostburg	1	0.8%	3	2.8%	4	3.4%	2	2.5%	0	0.0%
Gateway	8	6.3%	1	0.9%	10	8.5%	3	3.8%	1	5.0%
Grantsville	0	0.0%	0	0.0%	1	0.8%	0	0.0%	0	0.0%
Hagerstown	27	21.1%	5	4.7%	5	4.2%	2	2.5%	1	5.0%
Havre de Grace	2	1.6%	5	4.7%	3	2.5%	0	0.0%	0	0.0%
Highlandtown	14	10.9%	7	6.5%	9	7.6%	1	1.3%	0	0.0%
Leonardtwn	5	3.9%	0	0.0%	3	2.5%	4	5.0%	0	0.0%
Salisbury	9	7.0%	3	2.8%	15	12.7%	2	2.5%	3	15.0%
Silver Spring	0	0.0%	10	9.3%	15	12.7%	16	20.0%	1	5.0%
Snow Hill	2	1.6%	5	4.7%	1	0.8%	1	1.3%	1	5.0%
Station North	5	3.9%	0	0.0%	3	2.5%	2	2.5%	0	0.0%
Stevensville	2	1.6%	1	0.9%	3	2.5%	1	1.3%	0	0.0%
Wheaton	6	4.7%	9	8.4%	3	2.5%	14	17.5%	2	10.0%
Total	128	100.0%	107	100.0%	118	100.0%	80	100.0%	20	100.0%

Sources: Maryland A&E Districts, MSAC, RESI

The A&E Districts reported a total of 128 new capital projects initiated or completed during FY 2017. These projects ranged in scope from new planters and recycling bins to residential construction and façade improvement. With 27 projects, Hagerstown had the highest number of new capital projects, representing 21.1 percent of the total. Cumberland had the next highest total, at 18, or 14.1 percent. Annapolis, Bel Air, Grantsville, and Silver Spring each reported having no new capital projects in FY 2017.

Maryland's A&E Districts reported that 107 new retailers opened within their borders in FY 2017. These encompass an array of retailers, including big box stores, local distilleries, and clothing stores. Frederick reported the largest number of new retailers, with 19 (or 17.8 percent of the total) openings during the FY. Silver Spring reported the second-highest number, with 10, or 9.3 percent. Elkton, Grantsville, Leonardtown, and Station North reported that no new retailers opened within their districts during the FY.

Throughout FY 2017, 118 new businesses opened in Maryland's A&E Districts. These represent a wide range of businesses, including but not limited to yoga studios, engineering firms, banks, and arts enterprises. Bethesda, with 16 new businesses representing 13.6 percent of the total, had the largest number of new businesses. Salisbury and Silver Spring each reported 15 new businesses, while Annapolis reported no new businesses in FY 2017.

Maryland's A&E Districts reported 80 restaurant openings in FY 2017, ranging from small local coffee shops to full-service restaurants and bars. The majority of these restaurants are in Montgomery County: 16 (20.0 percent of the total) opened in Silver Spring, 14 (17.5 percent of the total) opened in Wheaton, and 11 (13.8 percent of the total) opened in Bethesda. No restaurants opened in Cumberland, Grantsville, or Havre de Grace during FY 2017.

Of the 20 new organizations that Maryland's A&E Districts reported in FY 2017, five are in Bethesda and three are in Salisbury. Both Chestertown and Wheaton reported two new organizations. Many of these 20 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 2017. Information regarding retailers, businesses, restaurants, and organizations was included in the annual reports.

Maryland Arts and Entertainment Districts Survey Analysis FY 2017
RESI of Towson University

Figure 2: Closures by A&E District, FY 2017

A&E District	Retail		Businesses		Restaurants		Organizations	
	Number	Percentage	Number	Percentage	Number	Percentage	Number	Percentage
Annapolis	0	0.0%	2	5.4%	0	0.0%	0	0.0%
Bel Air	1	1.6%	3	8.1%	3	8.6%	0	0.0%
Berlin	2	3.2%	0	0.0%	2	5.7%	0	0.0%
Bethesda	5	8.1%	3	8.1%	7	20.0%	1	5.3%
Bromo	0	0.0%	0	0.0%	1	2.9%	1	5.3%
Cambridge	2	3.2%	1	2.7%	0	0.0%	2	10.5%
Chestertown	5	8.1%	2	5.4%	0	0.0%	1	5.3%
Cumberland	2	3.2%	0	0.0%	0	0.0%	0	0.0%
Denton	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Elkton	1	1.6%	0	0.0%	0	0.0%	0	0.0%
Frederick	10	16.1%	0	0.0%	2	5.7%	0	0.0%
Frostburg	1	1.6%	1	2.7%	1	2.9%	0	0.0%
Gateway	1	1.6%	3	8.1%	1	2.9%	0	0.0%
Grantsville	0	0.0%	1	2.7%	0	0.0%	0	0.0%
Hagerstown	6	9.7%	1	2.7%	2	5.7%	0	0.0%
Havre de Grace	2	3.2%	2	5.4%	0	0.0%	0	0.0%
Highlandtown	11	17.7%	8	21.6%	0	0.0%	0	0.0%
Leonardtwn	2	3.2%	1	2.7%	2	5.7%	0	0.0%
Salisbury	1	1.6%	3	8.1%	0	0.0%	0	0.0%
Silver Spring	5	8.1%	0	0.0%	7	20.0%	1	5.3%
Snow Hill	0	0.0%	1	2.7%	0	0.0%	0	0.0%
Station North	1	1.6%	3	8.1%	2	5.7%	12	63.2%
Stevensville	0	0.0%	1	2.7%	0	0.0%	0	0.0%
Wheaton	4	6.5%	1	2.7%	5	14.3%	1	5.3%
Total	62	100.0%	37	100.0%	35	100.0%	19	100.0%

Sources: Maryland A&E Districts, MSAC, RESI

A&E Districts reported 62 retail closures in FY 2017. With 11, Highlandtown reported the largest number of retail closures, followed by Frederick, with 10 closures reported in FY 2017. Six districts—Annapolis, Bromo, Denton, Grantsville, Snow Hill, and Stevensville—reported no retail closures.

In total, Maryland's A&E Districts in FY 2017 reported 37 business closures in FY 2017. Eight closures, representing 21.6 percent of the total, occurred in Highlandtown. Bel Air, Bethesda, Gateway, Salisbury, and Station North each reported three business closures, or 8.1 percent each of the total.

Statewide, Maryland's A&E Districts reported a total of 35 restaurant closures in FY 2017. Bethesda and Silver Spring both reported seven restaurant closures, or 20.0 percent of the total each, followed by Wheaton, with five closures, representing 14.3 percent of the total. Twelve districts reported no restaurant closures in FY 2017.

In total, 19 organizations closed or relocated out of Maryland's A&E Districts in FY 2017. The majority, 12 organizations or 63.2 percent of the total, were in Station North. Of note, the loss of 12 organizations in Station North was the result of a single event, the closure of the Bell Foundry.

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 45 retailers, 81 businesses, 45 restaurants, and one organization in FY 2017.

Figure 3: Net Changes in Retailers, Businesses, Restaurants, and Organizations by District, FY 2017

A&E District	Retailers	Businesses	Restaurants	Organizations
Annapolis	1	-2	1	0
Bel Air	3	2	-1	0
Berlin	3	2	0	0
Bethesda	3	13	4	4
Bromo	3	2	7	-1
Cambridge	0	0	2	-1
Chestertown	3	0	1	1
Cumberland	5	2	0	1
Denton	1	2	1	0
Elkton	-1	1	1	1
Frederick	9	10	1	1
Frostburg	2	3	1	0
Gateway	0	7	2	1
Grantsville	0	0	0	0
Hagerstown	-1	4	0	1
Havre de Grace	3	1	0	0
Highlandtown	-4	1	1	0
Leonardtwn	-2	2	2	0
Salisbury	2	12	2	3
Silver Spring	5	15	9	0
Snow Hill	5	0	1	1
Station North	-1	0	0	-12
Stevensville	1	2	1	0
Wheaton	5	2	9	1
Total	45	81	45	1

Sources: Maryland A&E Districts, MSAC, RESI

In FY 2017, Frederick saw the greatest net gain in retailers, with nine additional stores added. Silver Spring experienced the largest increase in businesses and restaurants, netting 15. Both Silver Spring and Wheaton reported a net gain of nine restaurants, the highest of all districts. Bethesda reported the largest net increase in organizations, with four.

3.3 FY 2017 Challenges

Districts also provided narratives regarding the challenges that they faced during FY 2017. RESI categorized the information provided in these narratives based on previous years' groupings. Figure 4 describes how many districts reported each type of challenge.

Figure 4: Number of Districts Reporting Challenges by Type of Challenge, FY 2017

Challenge Type	Number of Districts	Percent of Total Districts
Administrative	13	54.2%
Funding	12	50.0%
Technology	2	8.3%
Other	14	58.3%

Sources: Maryland A&E Districts, MSAC, RESI

As seen in Figure 4, districts most commonly experienced administrative and funding challenges. Of note, many of these obstacles overlap, for example by districts not having funding or resources to hire staff to complete administrative duties or develop social media/digital presence using technology.

Additionally, of the “other” challenges that 14 districts described, common themes emerged. For example, numerous districts described difficulties regarding space within their boundaries—not enough space or unaffordable rents. Districts also mentioned that the property tax incentives are not always the most efficient way to encourage activity. Some districts in more rural areas indicated that attracting visitors or foot traffic was a challenge. Finally, districts mentioned challenges with branding and signage to define their districts.

3.4 District Events and Festivals During FY 2017

Districts provided information regarding events and festivals that took place in their districts during FY 2017. RESI received and then cleaned these data for analysis. Figure 5 contains tabulations of events and festivals for FY 2017. Please note that not all districts provided information for all categories; attendance estimates were not available for numerous events and festivals. Furthermore, events or festivals that were reported but did not occur during FY 2017 were excluded from the tabulations.

Figure 5: Events by District, FY 2017

A&E District	Events	Percent	Attendance
Annapolis	10	1.1%	40,500
Bel Air	39	4.4%	22,079
Berlin	27	3.0%	24,000
Bethesda	14	1.6%	16,950
Bromo	6	0.7%	5,700
Cambridge	131	14.6%	547
Chestertown	11	1.2%	12,870
Cumberland	242	27.0%	71,667
Denton	17	1.9%	4,025
Elkton	12	1.3%	14,290
Frederick	32	3.6%	219,799
Frostburg	13	1.5%	5,995
Gateway	77	8.6%	12,659
Grantsville	18	2.0%	10,045
Hagerstown	35	3.9%	26,100
Havre de Grace	25	2.8%	109,360
Highlandtown	13	1.5%	2,325
Leonardtwn	24	2.7%	10,299
Salisbury	42	4.7%	49,196
Silver Spring ³	N/A	N/A	N/A
Snow Hill	9	1.0%	1,245
Station North	46	5.1%	0
Stevensville	12	1.3%	1,255
Wheaton	40	4.5%	15,185
Total	895	100.0%	676,091

Sources: Maryland A&E Districts, MSAC, RESI

As seen in Figure 5, Maryland’s A&E Districts reported hosting 895 events with an estimated attendance of 676,091 in FY 2017. Cumberland reported the largest number of events, with 242 over the course of the fiscal year, attracting an estimated attendance of 71,667. Frederick reported the highest attendance levels, with an estimated 219,799 visitors coming to its 32 events. In terms of attendance, Frederick’s largest event was Festival of the Lights First Saturday, with reported attendance of 168,000.

Districts also provided information regarding festivals held within their boundaries during FY 2017. As with events, all data are self-reported, and not all districts provided estimated attendance totals. Figure 6 provides information regarding festivals in FY 2017.

³ Please note that Silver Spring did not report events or festivals in the annual report for FY 2017.

Figure 6: Festivals by District, FY 2017

A&E District	Festivals	Percent	Attendance
Annapolis	5	5.0%	94,000
Bel Air	7	6.9%	67,400
Berlin	7	6.9%	13,500
Bethesda	5	5.0%	85,000
Bromo	0	0.0%	0
Cambridge	10	9.9%	1,575
Chestertown	6	5.9%	25,800
Cumberland	2	2.0%	3,500
Denton	2	2.0%	10,250
Elkton	5	5.0%	8,351
Frederick	4	4.0%	22,000
Frostburg	8	7.9%	9,115
Gateway	5	5.0%	6,750
Grantsville	4	4.0%	23,530
Hagerstown	2	2.0%	9,500
Havre de Grace	3	3.0%	12,000
Highlandtown	2	2.0%	7,650
Leonardtwn	6	5.9%	30,050
Salisbury	3	3.0%	4,000
Silver Spring ⁴	N/A	N/A	N/A
Snow Hill	6	5.9%	3,250
Station North	4	4.0%	43,000
Stevensville	2	2.0%	2,300
Wheaton	3	3.0%	16,600
Total	101	100.0%	499,121

Sources: Maryland A&E Districts, MSAC, RESI

Statewide, Maryland’s A&E Districts reported 101 festivals with 499,121 estimated attendees, as presented in Figure 6. While Cambridge reported the most festivals in FY 2017, ten festivals comprising 9.9 percent of the statewide total, Annapolis reported the highest total attendance in FY 2017, with 94,000 people at its five festivals.

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.

⁴ Please note that Silver Spring did not report events or festivals in the annual report for FY 2017.

Figure 7: Enterprises by District, FY 2017

A&E District	Enterprises	Percent	Attendance
Annapolis	22	4.0%	N/A
Bel Air	13	2.3%	2,300
Berlin	30	5.4%	277,500
Bethesda	23	4.1%	848,575
Bromo	24	4.3%	52,000
Cambridge	12	2.2%	16,325
Chestertown	10	1.8%	45,340
Cumberland	20	3.6%	59,150
Denton	8	1.4%	4,150
Elkton	26	4.7%	52,584
Frederick	53	9.5%	N/A
Frostburg	23	4.1%	275,362
Gateway	11	2.0%	32,100
Grantsville	9	1.6%	667,512
Hagerstown	28	5.0%	117,742
Havre de Grace	5	0.9%	43,500
Highlandtown	43	7.7%	N/A
Leonardtwn	15	2.7%	33,484
Salisbury	21	3.8%	21,115
Silver Spring	74	13.3%	1,189,850
Snow Hill	9	1.6%	N/A
Station North	16	2.9%	N/A
Stevensville	14	2.5%	4,111
Wheaton	46	8.3%	N/A
Total	555	100.0%	3,742,700

Sources: Maryland A&E Districts, MSAC, RESI

As seen in Figure 7, Maryland’s A&E Districts are home to 555 enterprises. With 74 enterprises, Silver Spring reported the largest number, followed by Frederick, with 53. Silver Spring also reported the highest number of visitors for its enterprises, at nearly 1.2 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 at some of these enterprises. 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 2017

Enterprise Type	Number	Percent	Attendance
Galleries/Co-ops	120	21.6%	210,883
Performance Venues	114	20.5%	1,148,130
Arts Organizations	74	13.3%	94,533
Arts Education	60	10.8%	242,384
Arts Suppliers/Services	48	8.6%	68,500
Museums	41	7.4%	81,570
Other	98	17.7%	1,896,700
Total	555	100.0%	3,742,700

Sources: Maryland A&E Districts, MSAC, RESI

Maryland’s A&E Districts contain 555 enterprises statewide. Galleries/co-ops are the most common type of enterprise, with 120 showrooms throughout the state. Of the defined enterprise types, performance venues attracted the highest level of reported participants, with over 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 2017.

Figure 9: Public Art by District, FY 2017

District	Public Art	Percent
Annapolis	0	0.0%
Bel Air	20	12.6%
Berlin	0	0.0%
Bethesda	2	1.3%
Bromo	0	0.0%
Cambridge	5	3.1%
Chestertown	0	0.0%
Cumberland	0	0.0%
Denton	1	0.6%
Elkton	6	3.8%
Frederick	14	8.8%
Frostburg	2	1.3%
Gateway	1	0.6%
Grantsville	2	1.3%
Hagerstown	1	0.6%
Havre de Grace	16	10.1%
Highlandtown	0	0.0%
Leonardtwn	1	0.6%
Salisbury	0	0.0%
Silver Spring	66	41.5%
Snow Hill	0	0.0%
Station North	0	0.0%
Stevensville	0	0.0%
Wheaton	22	13.8%
Total	159	100.0%

As seen above, Maryland’s A&E Districts reported a total of 159 public artworks in fourteen districts. Silver Spring reported the plurality, with 66 works. Wheaton reported the second-highest total, with 22 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 2017

A&E District	Artist Housing?	Number of Units
Annapolis	No	--
Bel Air	No	--
Berlin	No	--
Bethesda	Yes	2
Bromo	Yes	108
Cambridge	No	--
Chestertown	No	--
Cumberland	No	--
Denton	Yes	1
Elkton	No	--
Frederick	No	--
Frostburg	No	--
Gateway	Yes	100
Grantsville	Yes	2
Hagerstown	Yes	4
Havre de Grace	Yes	3
Highlandtown	Yes	8
Leonardtwn	Yes	54
Salisbury	Yes	95
Silver Spring	Yes	232
Snow Hill	Yes	2
Station North	Yes	N/A
Stevensville	Yes	3
Wheaton	Yes	503
Total	15	1,117

Sources: Maryland A&E Districts, MSAC, RESI

The majority of Maryland’s A&E Districts, 15 out of 24, reported having housing available specifically for artists. Combined, these districts offer 1,117 units, the majority of which are in districts in the Washington, DC, metro area (two in Bethesda, 100 in Gateway, 232 in Silver Spring, and 503 in Wheaton).

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 of the occupancy rates 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. Some districts reported occupancy rates of 0 percent.

Figure 11: Occupancy Rate by Type of Real Estate by District, FY 2017

A&E District	Storefront/ Commercial	Residential	Industrial/ Manufacturing	Mixed Use
Annapolis	95%	100%	N/A	90%
Bel Air	95%	99%	0%	0%
Berlin	99%	100%	100%	99%
Bethesda	95%	90%	N/A	95%
Bromo	60%	84%	N/A	40%
Cambridge	75%	65%	100%	70%
Chestertown	90%	100%	0%	95%
Cumberland	65%	90%	90%	70%
Denton	75%	81%	0%	80%
Elkton	90%	90%	N/A	100%
Frederick	97%	97%	97%	95%
Frostburg	87%	95%	0%	85%
Gateway	88%	100%	90%	86%
Grantsville	90%	70%	N/A	N/A
Hagerstown	77%	90%	100%	67%
Havre de Grace	0%	0%	0%	89%
Highlandtown	83%	95%	70%	70%
Leonardtwn	90%	90%	0%	95%
Salisbury	88%	98%	0%	75%
Silver Spring	93%	96%	97%	91%
Snow Hill	65%	10%	0%	10%
Station North	30%	50%	0%	20%
Stevensville	97%	98%	0%	98%
Wheaton	97%	90%	N/A	77%
Average	84%	86%	93%	77%

Sources: Maryland A&E Districts, MSAC, RESI

As seen above, the average of the occupancy rates by type of real estate range from 77 percent to 93 percent. While the occupancy rate is highest for industrial/manufacturing space, only eight districts reported a positive occupancy rate for this type of space. Station North reported the lowest occupancy rate for commercial real estate, with 30 percent of storefront or commercial space occupied. Snow Hill reported the lowest residential and mixed-use occupancy rates, at 10 percent each.

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. Half of Maryland’s A&E Districts maintain official artist registries, with 694 artists registered. Of these 694 total artists registered in the 12 districts that maintain registries, 188

Maryland Arts and Entertainment Districts Survey Analysis FY 2017
RESI of Towson University

were registered in FY 2017. Figure 12 contains further information regarding registered artists at the district level in FY 2017. Please note that districts who do not maintain a registry are described with “N/A.”

Figure 12: Registered Artists by District, FY 2017

A&E District	Number in Registry	Number Registered in FY 2017
Annapolis	N/A	N/A
Bel Air	46	2
Berlin	78	12
Bethesda	N/A	N/A
Bromo	N/A	N/A
Cambridge	36	N/A
Chestertown	N/A	N/A
Cumberland	N/A	N/A
Denton	2	1
Elkton	15	15
Frederick	N/A	N/A
Frostburg	N/A	N/A
Gateway	232	137
Grantsville	N/A	N/A
Hagerstown	N/A	N/A
Havre de Grace	40	N/A
Highlandtown	N/A	N/A
Leonardtwn	72	10
Salisbury	N/A	N/A
Silver Spring	35	3
Snow Hill	11	1
Station North	N/A	N/A
Stevensville	62	3
Wheaton	65	4
Total	694	188

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 2017, described in Figure 13.

Figure 13: Estimated Artists by District, FY 2017

A&E District	Estimated Artists
Annapolis	30
Bel Air	75
Berlin	125
Bethesda	1,000
Bromo	225
Cambridge	95
Chestertown	14
Cumberland	14
Denton	5
Elkton	314
Frederick	250
Frostburg	450
Gateway	255
Grantsville	16
Hagerstown	300
Havre de Grace	50
Highlandtown	250
Leonardtwn	72
Salisbury	70
Silver Spring	50
Snow Hill	16
Station North	1,000
Stevensville	62
Wheaton	75
Total	4,813

Sources: Maryland A&E Districts, MSAC, RESI

As seen in Figure 13, Maryland’s A&E Districts have an estimated 4,813 artists creating within their boundaries. Bethesda and Station North reported the highest number of artists, with 1,000 each. Wheaton was the only district that reported having an artist relocation program, though they reported no artists relocating to the district during FY 2017.

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.⁵ Figure 14 displays the number of businesses by districts that utilized tax incentives in FY 2017.

⁵ “A&E District Resources,” Maryland State Arts Council, accessed September 10, 2018, <https://www.msac.org/node/62709>.

Figure 14: Businesses' Tax Incentive Utilization by District, FY 2017

A&E District	Admissions and Amusement Tax Abatement		Property Tax Credits	
	Number	Percent	Number	Percent
Annapolis	1	2.2%	0	0.0%
Bel Air	0	0.0%	0	0.0%
Berlin	2	4.3%	0	0.0%
Bethesda	2	4.3%	1	50.0%
Bromo	2	4.3%	1	50.0%
Cambridge	1	2.2%	0	0.0%
Chestertown	0	0.0%	0	0.0%
Cumberland	0	0.0%	0	0.0%
Denton	0	0.0%	0	0.0%
Elkton	0	0.0%	0	0.0%
Frederick	12	26.1%	0	0.0%
Frostburg	0	0.0%	0	0.0%
Gateway	2	4.3%	0	0.0%
Grantsville	1	2.2%	0	0.0%
Hagerstown	3	6.5%	0	0.0%
Havre de Grace	5	10.9%	0	0.0%
Highlandtown	0	0.0%	0	0.0%
Leonardtown	2	4.3%	0	0.0%
Salisbury	2	4.3%	0	0.0%
Silver Spring	2	4.3%	0	0.0%
Snow Hill	0	0.0%	0	0.0%
Station North	7	15.2%	0	0.0%
Stevensville	1	2.2%	0	0.0%
Wheaton	1	2.2%	0	0.0%
Total	46	100.0%	2	100.0%

Sources: Maryland A&E Districts, MSAC, RESI

As shown in Figure 14, 46 businesses in 16 districts utilized the Admissions and Amusement Tax abatement in FY 2017. The plurality of these businesses, 12 out of the 46, or 26.1 percent, were in Frederick, followed by seven businesses, or 15.2 percent of the total, in Station North. Only two districts reported a single business each that took advantage of property tax credits: one business in Bethesda and one in Bromo.

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 22 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.

Maryland Arts and Entertainment Districts Survey Analysis FY 2017

RESI of Towson University

Figure 15: Incentives Reported by A&E District, FY 2017

A&E District	Other Incentives?	Façade Improvement	Loan	Other Tax Credit/Abatement	Grants	Other	Non-financial
Annapolis	No	N/A	N/A	N/A	N/A	N/A	N/A
Bel Air	Yes	Yes	Yes	Yes	No	No	Yes
Berlin	Yes	Yes	No	No	No	No	No
Bethesda	Yes	No	No	No	No	Yes	No
Bromo	Yes	Yes	Yes	Yes	No	Yes	No
Cambridge	Yes	No	Yes	Yes	No	No	No
Chestertown	Yes	No	No	Yes	No	No	No
Cumberland	Yes	Yes	Yes	Yes	Yes	No	No
Denton	Yes	No	Yes	No	No	No	Yes
Elkton	No	N/A	N/A	N/A	N/A	N/A	N/A
Frederick	Yes	No	No	Yes	No	No	No
Frostburg	Yes	No	No	Yes	Yes	No	No
Gateway	Yes	Yes	No	Yes	No	No	No
Grantsville	Yes	Yes	No	Yes	Yes	No	No
Hagerstown	Yes	No	Yes	Yes	Yes	Yes	No
Havre de Grace	Yes	Yes	Yes	Yes	Yes	Yes	No
Highlandtown	Yes	No	No	Yes	No	Yes	No
Leonardtwn	Yes	No	No	No	No	No	Yes
Salisbury	Yes	Yes	Yes	Yes	No	No	No
Silver Spring	Yes	No	No	Yes	Yes	Yes	Yes
Snow Hill	Yes	No	Yes	Yes	Yes	No	No
Station North	Yes	No	No	Yes	No	No	No
Stevensville	Yes	No	Yes	No	Yes	No	No
Wheaton	Yes	No	No	Yes	Yes	Yes	Yes
Total	22	8	10	17	9	7	5

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. Loans were the second-most-common incentive, available in 10 districts. Non-financial incentives included demographic and economic analysis, marketing support, and free parking.

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

Figure 16: Use of Communication Tools, FY 2017

Tool	Number	Percentage
Facebook	24	100.0%
Website	24	100.0%
Online events calendar	21	87.5%
Twitter	14	58.3%
Artist registry	12	50.0%
Other - specify	10	41.7%
Media Page	6	25.0%

Sources: Maryland A&E Districts, MSAC, RESI

All 24 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.

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 2017

A&E District	Federal Funding Type	Amount
Frederick	National Endowment for the Arts	\$50,000
Gateway	National Endowment for the Arts	\$10,000
Station North	National Endowment for the Arts	\$35,000
Denton	Other—USDA Rural Business Development Grant	\$35,000
Total		\$130,000

Sources: Maryland A&E Districts, MSAC, RESI

In FY 2017, four districts—Denton, Fredrick, Gateway, and Station North—reported receiving a total of \$130,000 in federal grants. The National Endowment for the Arts awarded three of these grants, while Denton received funding from a United States Department of Agriculture (USDA) Rural Business Development Grant.

Maryland Arts and Entertainment Districts Survey Analysis FY 2017
RESI of Towson University

Figure 18: A&E Districts Receiving Funding from MSAC, FY 2017

MSAC Funding Type	A&E District	Amount
Technical Assistance	Annapolis	\$2,500
	Bel Air	\$2,175
	Cumberland	\$2,500
	Elkton	\$1,920
	Frostburg	\$2,500
	Havre de Grace	\$2,500
	Gateway	\$2,500
	Silver Spring	\$2,500
	Station North	\$2,500
	Total	\$21,595
Grants for Organizations	Bethesda	\$1,500
	Hagerstown	\$19,487
	Gateway	\$2,000
	Total	\$22,987
Public Art	Gateway	\$5,000
	Hagerstown	\$5,000
	Leonardtown	\$5,000
	Total	\$15,000
Maryland Touring	Denton	\$3,250
	Frederick	\$2,500
	Silver Spring	\$1,500
	Total	\$7,250
Other	Leonardtown	\$1,900
	Total	\$1,900
Total		\$68,732

Sources: Maryland A&E Districts, MSAC, RESI

Fourteen districts reported receiving a combined total of \$68,732 from MSAC in FY 2017. The largest single award was a grant for an organization in Hagerstown, valued at \$19,487. Technical assistance was the most common type of funding that districts received, with nine districts reporting a combined total of \$21,595 in awards. "Other" MSAC funding consisted of a grant used for events including "Earth Day, Beach Party, [and] Concerts."

Maryland Arts and Entertainment Districts Survey Analysis FY 2017

RESI of Towson University

Figure 19: A&E Districts Receiving Other State Funding, FY 2017

State Funding Source	A&E District	Amount
Maryland Main Street	Bel Air	\$15,000
	Berlin	\$11,000
	Denton	\$31,000
	Elkton	\$25,000
	Frostburg	\$11,600
	Hagerstown	\$15,000
	Total	\$108,600
Heritage Areas Authority/Planning	Chestertown	\$1,125
	Cumberland	\$9,000
	Total	\$10,125
Department of Transportation	Frostburg	\$16,800
	Total	\$16,800
Capital Bond	Gateway	\$30,000
	Total	\$30,000
Other: Maryland Film Office Other: DHCD Keep Maryland Beautiful Other: Department of Housing and Community Development Other: MD Environmental Trust Clean Up & Green Up Other: Baltimore Regional Neighborhood Initiative—Spruce Up Other: Baltimore Regional Neighborhood Initiative—Tenant Fit-out Other: DHCD - Elevator/Fire Sprinklers for Town Offices Other: DHCD Technical Assistance Grant Other: Baltimore National Heritage Area	Bel Air	\$1,000
	Chestertown	\$3,385
	Frederick	\$15,500
	Hagerstown	\$10,000
	Hagerstown	\$5,000
	Highlandtown	\$75,000
	Highlandtown	\$150,000
	Leonardtwn	\$300,000
	Snow Hill	\$30,000
	Station North	\$5,000
Total	\$594,885	
Total		\$760,410

Sources: Maryland A&E Districts, MSAC, RESI

State agencies awarded a reported \$760,410 to Maryland’s A&E Districts in FY 2017. “Other” awards comprise the majority of this total, with \$300,000 going to Leonardtown from the Department of Housing and Community Development (DHCD) and a combined \$225,000 going to Highlandtown from the Baltimore Regional Neighborhood Initiative. Of the defined state funding sources, Maryland Main Street was the most popular, with six districts receiving a combined total of \$108,600.

Maryland Arts and Entertainment Districts Survey Analysis FY 2017
RESI of Towson University

Figure 20: A&E Districts Receiving Local Funding, FY 2017

A&E District	Local Funding Source	Amount
Annapolis	Inner West Street Association	\$5,000
	Arts Council of Anne Arundel County	\$7,000
	City of Annapolis	\$15,000
	Total	\$27,000
Bel Air	Harford County Cultural Arts Board	\$7,700
	Total	\$7,700
Berlin	Worcester County Arts Council	\$1,000
	Worcester County Arts Council	\$1,500
	Town of Berlin	\$1,000
	Total	\$3,500
Bromo	Goldseker Foundation	\$50,000
	Blaustein Foundation	\$12,500
	Downtown Partnership of Baltimore	\$30,000
	Broadway Across America	\$3,500
	Total	\$96,000
Chestertown	SFW Foundation	\$25,000
	Total	\$25,000
Cumberland	Downtown Development Commission A&E Match	\$2,500
	Total	\$2,500
Denton	Eastern Shore Heritage, Inc.	\$2,000
	Total	\$2,000
Frederick	Frederick Arts Council	\$1,000
	Saturday Morning Butts	\$2,000
	Nora Roberts	\$5,000
	Burning Man Foundation	\$7,000
	Total	\$15,000
Gateway	Prince George's County CDBG PY42	\$50,000
	Total	\$50,000
Hagerstown	Washington County Arts Council	\$5,000
	Washington County Arts Council	\$2,100
	Total	\$7,100
Havre de Grace	Harford County Tourism Grant	\$15,000
	Harford County Cultural Arts Board	\$6,700
	Total	\$21,700
Leonardtown	Fireman's Museum - Comm. Parks Playground Grant	\$125,468
	Pier & Boatslip - Waterway Improvement Grant	\$99,500
	Main Street Affiliate Designation	N/A
	Total	\$224,968
Salisbury	Community Foundation of the Eastern Shore	\$5,000
	Total	\$5,000

Maryland Arts and Entertainment Districts Survey Analysis FY 2017
RESI of Towson University

A&E District	Local Funding Source	Amount
Snow Hill	Worcester County Arts Council	\$1,000
	Total	\$1,000
Station North	T Rowe Price	\$10,000
	France-Merrick	\$20,000
	Baltimore Office of Promotion & Arts	\$15,000
	Total	\$45,000
Wheaton	Montgomery County - We Art Wheaton Grant	\$90,000
	Total	\$90,000
Total		\$622,468

Sources: Maryland A&E Districts, MSAC, RESI

Maryland's A&E Districts reported receiving a combined \$622,468 in local funding in FY 2017. With \$224,968 in local support, Leonardtown reported the plurality of these funds and also received the two largest local awards: \$125,468 for a playground grant and \$99,500 for waterway improvement.

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

Maryland Arts and Entertainment Districts Survey Analysis FY 2017

RESI of Towson University

Figure 21: A&E Districts Receiving Operating Support, FY 2017

A&E District	Provider	Dollar Amount
Annapolis	N/A	N/A
Bel Air	Town of Bel Air Economic Development Department	\$13,800
Berlin	N/A	N/A
Bethesda	Bethesda Urban Partnership	N/A
	Bethesda A&E District board	N/A
Bromo	N/A	N/A
Cambridge	Cambridge Economic Development	\$500
Chestertown	Town of Chestertown	\$14,000
	Town of Chestertown	N/A
Cumberland	N/A	N/A
Denton	Town of Denton	\$5,000
Elkton	Elkton Alliance	N/A
Frederick	Delaplaine Foundation	N/A
	The Baker Fund	N/A
Frostburg	City of Frostburg	\$2,500
Gateway	MNCPPC Department of Parks and Recreation Arts and Cultural Heritage 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
Highlandtown	N/A	N/A
Leonardtwn	Commissioners of Leonardtown	\$10,000
Salisbury	City of Salisbury	\$158,500
Silver Spring	Montgomery County	\$200,000
	Town of Snow Hill	\$6,000
Snow Hill	Worcester County Tourism	\$1,000
	Worcester County Economic Development	\$1,000
	William Baker Foundation	\$30,000
Station North	Deutsch Foundation	\$50,000
	MICA	\$20,000
	Blaustein Foundation	\$15,000
Stevensville	Queen Anne's County Tourism	\$1,000
Wheaton	Montgomery County	\$340,000
Total		\$1,416,300

Sources: Maryland A&E Districts, MSAC, RESI

As seen in Figure 21, over \$1.4 million in operating support was awarded to 19 of Maryland's A&E Districts in FY 2017. 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

Maryland Arts and Entertainment Districts Survey Analysis FY 2017

RESI of Towson University

funding amounts, Hagerstown reported the single highest award, at \$453,000, followed by Wheaton, at \$340,000.

Figure 22: A&E Districts Receiving In-Kind Support, FY 2017

A&E District	Provider	Type	Estimated Value	
Annapolis	Inner West Street Association	Marketing	\$10,000	
Bel Air	Town of Bel Air Police and Public Works	Event Staffing	\$5,000	
	Town of Bel Air	Office Space	\$2,500	
Berlin	Salt Water Media	Website Design/Hosting	\$2,500	
	Baked Dessert Café	Prototype Design	\$300	
Bethesda	Bethesda Urban Partnership	Program Implementation	N/A	
Bromo	N/A	N/A	N/A	
Chestertown	Town of Chestertown	Space, Materials, Phone, Copy Machine	\$10,000	
Denton	Town of Denton	Administrative Support	\$5,000	
	Town of Denton	Office Space	\$1,500	
Elkton	Margie Blystone	Volunteer Support	\$14,995	
Frederick	Aushman Family Foundation	Office Space	\$14,400	
Frostburg	City of Frostburg	Office Space, Administrative Support	\$6,000	
	Frostburg First	Administrative Support	\$16,500	
Gateway	N/A			
Grantsville	Garrett County Arts Council	Travel to MSAC Meeting	\$844	
	Little Crossings LLC	Meeting Space	\$1,200	
Hagerstown	N/A			
Havre de Grace	City of Havre de Grace	Tourism and PR	\$3,000	
	City of Havre de Grace	City Staff Support	\$20,000	
Highlandtown	Creative Alliance	Staff	\$50,000	
	Southeast CDC	Staff	\$50,000	
Leonardtwn	Commissioners of Leonardtown	Grant/Report Writing, Events Planning, Office Space, Administrative Support, Funding	\$50,000	
		Leonardtwn Business Association	Events	\$10,350
		Leonardtwn Business Association	Advertising	\$4,000
Salisbury	City Of Salisbury	Office Space	\$7,200	
	City of Salisbury	Other Support	\$15,000	
	PKS Certified Public Accountants	Accounting	\$6,000	
	WMDT	Advertising	\$8,000	
	Dicarolo Digital Copy Center	Printing	\$500	
	Robinson's Family of Businesses	Printing	\$1,500	
	VP Shoes	Storage	\$1,000	
Kacey Martin	Graphic Design	\$1,000		

Maryland Arts and Entertainment Districts Survey Analysis FY 2017

RESI of Towson University

A&E District	Provider	Type	Estimated Value
	Mattice Interactive	Web Hosting	\$200
	PAC-14	Advertising	\$500
Silver Spring	Montgomery County-Silver Spring Regional Center	Office Support	\$50,000
Snow Hill	Town of Snow Hill	N/A	\$10,000
Station North	Joe Squared	Food	\$500
Stevensville	Queen Anne's County Tourism	N/A	\$10,000
Wheaton	Montgomery County	Office Support	\$10,000
Total			\$399,489

Sources: Maryland A&E Districts, MSAC, RESI

Districts also receive in-kind support from their communities, with an estimated value of \$399,489 in FY 2017. 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 2017 Goals and Work Plan

Some of the overarching goals of the A&E districts include the following:

- To expand public art projects.
- To increase marketing and/or branding efforts, particularly with signage.
- To encourage relocation of galleries, art-related businesses, and retail businesses into the districts.

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

- “Incorporate more public art and downtown murals by having local artists work in conjunction with the County Arts Council to acquire grants and funding to implement said projects.”
- “Another goal...is to create an A&E branded window cling for businesses located inside the District. This is an affordable, easy to install method to provide window signage. With businesses within the District presenting similar signage in their windows, residents and visitors will quickly gain an awareness of the District as they walk the streets downtown.”
- “Mark A&E district with banners. As part of a wayfinding and streetscape project currently in search of funding, we will include branding banners for the District.”

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 2017

Type of Assistance	Number	Percentage ⁶
Funding Opportunities	10	41.7%
Marketing	9	37.5%
Networking w/ Other Districts	7	29.2%
Board Development	3	12.5%
Other	11	45.8%

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 41.7 percent indicating funding opportunities as something that would be beneficial to their A&E districts. Nearly as many districts indicated that they could use assistance with marketing and branding.

Eleven respondents indicated some other type of assistance that would be helpful to their district. A sample of these responses related to the following:

- Public art,
- District expansion,
- Workshops directly with artists and stakeholders, and
- Community building.

4.0 Conclusion

There was a plethora of activity in Maryland’s A&E Districts in FY 2017. In addition to 128 new capital projects that were initiated or completed, the districts statewide reported a net increase of 45 retailers, 81 businesses, 45 restaurants, and one organization. The 895 events that took place within the districts’ borders attracted an estimated 676,091 attendees, while 101 festivals had an estimated 499,121 in attendance. Enterprises such as galleries/co-ops, performance venues, museums, arts education groups, arts organizations, arts suppliers/services, and others encouraged over 3.7 million people to visit A&E Districts. Furthermore, districts reported that 159 works of public art were available for citizens to enjoy.

The majority of districts offer some type of housing for artists and have 1,117 units for artists. Some districts maintain artist registries; of the 694 artists registered, 188 registered in FY 2017. In total, Maryland’s A&E Districts estimate that 4,813 artists work within their borders.

Statewide, 46 businesses within A&E Districts have taken advantage of the Admissions and Amusement Tax abatement program, while two 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

⁶ The values shows are a percent of the 24 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 24 A&E Districts reported receiving public funding at the federal, state, and local levels, totaling nearly \$1.6 million. Districts also received operating support and in-kind support, conservatively valued at approximately \$1.4 million and \$400,000, respectively.

In general, district goals include expanding public art projects, encouraging other arts-related enterprises to locate in the districts, and increasing awareness through branding/signage. Districts have actionable work plans to help achieve these goals. Outside of 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 September 10, 2018.
<https://www.msac.org/node/62709>.

“Arts and Entertainment Districts.” Maryland State Arts Council. Accessed September 6, 2018.
<https://www.msac.org/programs/arts-entertainment-districts>.

Appendix A—Maryland Arts and Entertainment District Annual Report

MARYLAND STATE ARTS COUNCIL

**FY 2017
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.

TABLE OF CONTENTS

Maryland State Arts Council Information 3
Final Report Procedure 4
A&E Districts Annual Report 5

MARYLAND STATE ARTS COUNCIL

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Baltimore, MD 21230 Email: msac.commerce@maryland.gov
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Fax: 410-333-1062 Office Hours: Monday through Friday, 8:30 AM –
5:00 PM

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

Maryland State Arts Councilors

Shelley Morhaim, *Chair*, Baltimore County
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
Carla Du Pree, Howard County
Senator Richard S. Madaleno, Jr., Montgomery County
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
Anne Winter West, Baltimore County

MSAC Staff

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Steven Skerritt-Davis Jennifer Menkhaus
Kimberly Doyle Christina Mullins
Steve Drapalski Okeena Stephenson
Pamela Dunne Christine Stewart
Liesel Fenner
Lauren Fowler
Michele Franz

ANNUAL REPORT PROCEDURE

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

- FY 2017 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 2017
RESI of Towson University

MSAC STAFF USE ONLY
AED 2017/_____

ARTS & ENTERTAINMENT DISTRICTS ANNUAL REPORT FY 2017
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 2017 (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 2017

RESI of Towson University

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 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 2017, 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