... Attachment A

THE BUSINESS OF ARTS AND CULTURE

SVCREATES



"WE ARE NOT IN KANSAS ANYMORE, *AND NEVER WERE.***"** _Connie Martinez, CEO, SVCreates



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RESEARCH:

Creative Community Builders (CCB) Americans for the Arts Joint Venture Silicon Valley Californians for the Arts Please visit svcreates.org for full list of resources and data.

Thank you to the SVCreates Board, SVBraintrust, Erin Fogg of Spoke Consulting, Daniel Garcia and Alexandra Urbanowski at SVCreates.

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SETTING THE STAGE

The essence of Silicon Valley informs our unique arts and cultural ecosystem.

Silicon Valley is a relatively young and highly educated region that attracts people from around the world. Our entrepreneurial, risk taking, startup culture fueled the emergence of a global center of technology and innovation at record speed – a feat for which we have become world renowned. And in doing so, we also created a broadly diverse "culture of churn" and unprecedented wealth that is, in many cases, only loosely tied to our local community.

Silicon Valley wealth is largely "new money" and resides with our technology elite, not the social elite who historically funded the arts. Just like our companies, Silicon Valley philanthropy leans global and is often driven by a desire to change the world. And, for many in our "valley of immigrants," connection to this place remains a bit illusive.

As a result, **there is a deep chasm between the capacity and propensity to fund arts and culture.**

We believe engagement and investment in our arts ecosystem requires a nuanced understanding of our region's unique and beautiful complexity and the value of the arts in overcoming our civic challenges. This publication will help you understand who we are as a cultural sector and what we bring to this special community, it will shed light on the particular challenges we face and how we are confronting them. Most importantly, it will help you understand your essential role in sustaining the business of the arts.

It is worth noting that our research for this project was underway before COVID-19 hit the arts sector particularly hard. You will see that we have added pandemic texture and insights to each section, but, as is true for most other sectors, we have yet to fully realize the long-term impact of 2020's concurrent crises on the arts.

Before we invite you to dig in, let's pause for a moment of reflection.

Imagine navigating a global pandemic, a racial reckoning, home schooling, and the social and economic complexities of this world without access to music, film, poetry, performances, visual arts, cultural events and festivals.

Hard to imagine? We agree. And we rest our case.

Warm regards,

Connie Martinez, CEO, SVCREATES

SILICON VALLEY ARTS & CULTURE EARLY ADOPTER OF THE 21ST CENTURY

From 20th Century Industrial Economy **To** 21st Century Creative Economy

Hierarchical Leadership Prominent Structures Observing Art Centralized Power Highly Capitalized Social Elitism Status Excellence

Entrepreneurial Leadership
Decentralized Creative Spaces
Creative Expression
People Power
Scrappy Great
Inclusivity
Cultural Identity
Relevance

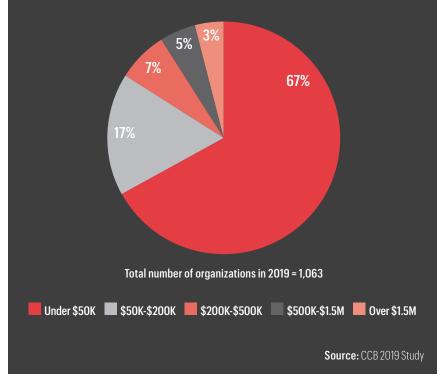
South Bay Hooper Caroline Kim

SAN JOSE HAS VERY FEW LARGE CULTURAL INSTITUTIONS COMPARED TO OTHER CITIES



SILICON VALLEY NONPROFIT ARTS LEAN SMALL

Only 8% have budgets over \$500k



WHO WE ARE

Silicon Valley's cultural ecosystem is a vast, organic network of hundreds of small- to mid-sized multidisciplinary arts and cultural organizations and thousands of artists, creative entrepreneurs, volunteers and individual participants.

MUCH LIKE THE WEB, SILICON VALLEY'S ARTS ECOSYSTEM IS INVISIBLE UNLESS YOU USE IT AS AN ARTS CONSUMER OR PRODUCER, OR BOTH – and your experience and understanding of the arts is contained almost entirely to the "sliver" of the ecosystem that you experience directly. This is not the case in most comparable US regions, where decades of cultural policies and investments have favored large "legacy" organizations, cultural facilities and donor events that are predominantly white and highly visible.

SILICON VALLEY HAS NEVER BEEN A TRADITIONAL MARKETPLACE FOR THE ARTS and has little history of well-funded, euro-centric arts organizations. In fact, ours is the only comparable city-region whose community of arts organizations with budgets over \$5M contracted between 2010 and 2020 (as San Jose Rep, American Musical Theater and San Jose Ballet closed). Just as these mid-sized euro-centric arts institutions were shuttered, 501c3 start-ups and culturally specific arts organizations grew by 60%, funded by "family and friends" and fueled by volunteers. During this same time, local public investment in the arts grew faster than inflation, population growth and national averages for public support, primarily driven by a surge in arts funding by the City of San Jose.

DEMOGRAPHIC SHIFTS AND TECHNOLOGY INNOVATIONS ARE THE KEY DISRUPTERS TO THE SECTOR as culturally specific demand grows and digital culture changes an individuals' relationship with the arts. Silicon Valley felt the impact of these disruptors ahead of other US regions because our innovation economy attracted the global talent that created the technology platforms for digital culture and changing demographics shifted priorities and the consumption of the arts. These disruptors were less about quality and more about relevance, as audiences began curating their own, and often culturally specific, experiences.

AS INTERNATIONAL IMMIGRATION HAS PROPELLED OUR POPULATION GROWTH, OUR ARTS AND CULTURE SECTOR HAS GROWN TO ALIGN WITH OUR DEMOGRAPHICS AND CULTURAL IDENTITY. A decade of growth, coupled with our entrepreneurial and engineering culture, fueled culturally specific art start-ups. At the same time, growth in funding for "technology centric" cultural institutions outpaced our national peers by a factor of 5 and expenditures by organizations focused on western art forms contracted by 50%.

AN ECOSYSTEM OF MANY VOICES AND TALENTS

There are thousands of stories like Usha's, Harumo's, Jimmy's, and the Xochitl project that breathe life into our ecosystem.

NONPROFIT ARTS LEADER - Usha Srinivasan, Mosaic America

A recent immigrant from India, Usha Srinivasan arrived in Silicon Valley in 1995 to attend Stanford. After earning her MBA she settled into a career in high tech. Becoming a mother forced her to reckon with issues of identity and belonging in her new homeland. She was struck by the lack of social integration between culturally

distinct groups in Silicon Valley – a consequence of rapid demographic shifts as the valley transformed from an agricultural center to a global high-tech hub. Raised in a highly multicultural environment in India, she knew first hand the power of culturally-rooted arts to build bridges. She founded Sangam Arts (now Mosaic America) in 2013 – a presenting platform for multicultural arts. In 2016, she was joined by Priya Das and together they launched Mosaic – a unique and innovative grassroots movement for cultivating

belonging through inter-cultural and co-created art. Mosaic programming has featured artists from over 35 cultures, collaborated with over 40 partner organizations and reached more than 25,000 in six Bay Area cities. Harumo Sato's art exudes joy, color, and wonder. The characters she draws could be your "spirit friend" and the magic of her life story is present in her work – a fantastic journey of spiritual crisis, impossible healing, and happy discovery. Soon after Harumo moved to Mountain View, a friend brought her to South

LOCAL ARTIST - Harumo Sato

First Fridays Art Walk in downtown San Jose. She met local artists and creatives and was overjoyed to find like-minded thinkers and makers. Harumo gained local and national recognition by selling art at fairs and festivals and in 2018, she landed a series of shows through Art Attack San Francisco and painted a mural at Dac Phuc restaurant during POW! WOW! San Jose. In 2019, she produced murals for Facebook and Target and is now hoping to create art for hospitals, rehabilitation clinics, and hospice centers—to cultivate joy for those most in need.

"Art really changed my life. It saved me-really cured me. So I want to enhance positivity and make people happy. I want to draw a peaceful world."

KEY INSIGHTS

WE ARE A VALLEY OF DIVERSE VOICES AND MANY CULTURES

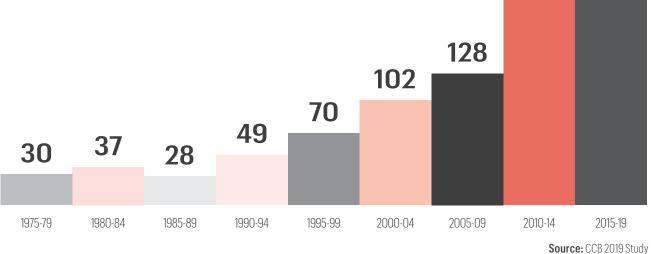
THE VIBRANCY OF OUR CULTURAL SECTOR Depends on Relevance & Diversity, not size of Institutions

UNLIKE OTHER US CITY-REGIONS, SILICON VALLEY'S Cultural Sector Nearly Matches the Demographics of the region

ORGANIZATIONAL BUDGET GROWTH DOES NOT Always equal resilience

OUR CULTURAL SECTOR MIRRORS OUR START-UP DNA AND LEANS "MARKET"

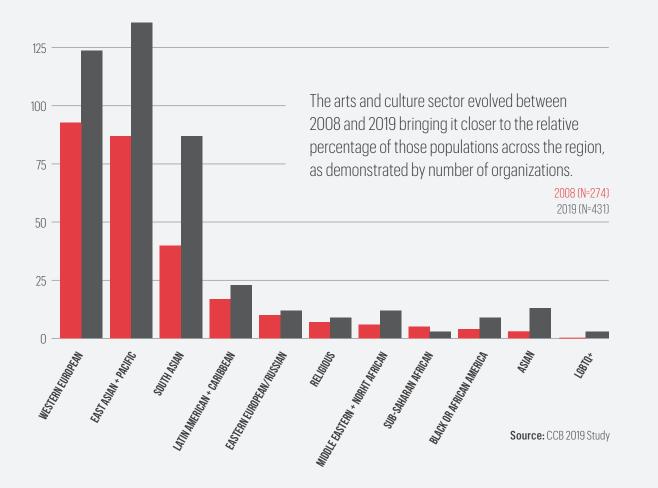
RATE OF NEW ARTS ORGANIZATIONS Reflect Silicon Valley's Start-up culture



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CULTURALLY SPECIFIC ORGANIZATIONS GREW BY 57%, DOMINATED BY ASIAN GROUPS



AN EVOLVING MARKETPLACE For Arts and Culture

The number of 501c3 arts organizations grew from 659 in 2008 to 1063 in 2019.

In Silicon Valley, about 60% of 501c3 arts and culture funding comes from consumers of culture, not funders. That's higher than comparable regions in the US.

While the financial value of the cultural sector remained relatively constant over the past decade, overall funding shifted from euro-centric arts organizations to technology-centric cultural institutions such as The Tech Interactive and the Computer History Museum.

OFF-THE-GRID - Xóchitl - Folklorico Dance

In the 1990s, former teacher Roslia Novotny established Xóchitl, a folklorico dance group that became very popular with students and their families at Lincoln High School in San Jose. Megan McAlister and Sam Cortez expanded this community gem and brought a cross-cultural perspective to Xóchitl that reflects the beautiful

diversity of Silicon Valley. Megan was born and raised in San Jose and brings a lifelong love of ballet and tap to Xóchitl and Sam brings his folklorico talent and experience after studying dance at University of Colima in Mexico and now directing Los Lupeños and Los Lupeños Juvenil in San Jose. These leaders are growing the community's energy and passion for dance and showcasing new dance routines from different regions. During COVID, the group stayed together through Xóchitl online cultural class. "My early journey with folklorico began at a young age by sneaking into

sound age by sheaking into my sister's practices," said Sam. "I hope Megan and I can help all of our kids carry the joy and creativity of dance into their community and their futures."

CREATIVE ENTREPRENEUR - Jimmy Fonseca

Raised in East San Jose, Jimmy Fonseca remembers experimenting with graffiti as his gateway into art. Today he is an artist and muralist on a mission to spread his floral aesthetic, by creating blooming flowers with a mixture of spray paint and acrylics rendered in lush, expressionist tones. With a degree in graphic

design, Jimmy works for a print shop and pursues his art business after hours. He currently does commissions, has several murals he has painted around town and hopes for international projects. He has been a featured artist at SoFA Street Fair and has artist residency at Local Color. "I get inspired by flowers that I see on walks in my neighborhood. It's something I like to go back to and experiment with. It's an organic thing, so it's not very structured. Flowers have contour, shading, lines that can be played

with no right or wrong way. The first time I tried spray painting a rose, it came out cool, so I wanted to do it again, to the point that it became kind of an obsession."

Dancer: Mariajose Garcia Morones, Xóchitl dancer class of 2020



WHY ART MATTERS

Arts are the key to a more just, soulful, and livable Silicon Valley. They bring joy, beauty and healing to our lives. They drive economic and social activity. They attach people to place and to each other, fuel creativity and learning, and foster social justice and truth making.

ARTS IMPROVE THE HEALTH AND WELL-BEING OF OUR COMMUNITY AND THE INDIVIDUALS WHO LIVE HERE. There is extensive scientific evidence that the arts improve our physical and mental health, increase civic engagement, nurture social cohesion, improve child welfare and lower poverty rates. Americans for the Arts recently reported that the arts result in a 66% improvement in individuals experiencing depression, 50% improvement in anxiety symptoms, and an 83% decrease of stress. About 50% of US healthcare institutions use arts programming for patients, families, and staff to reduce hospital stays, manage pain and decrease dependency on medication.

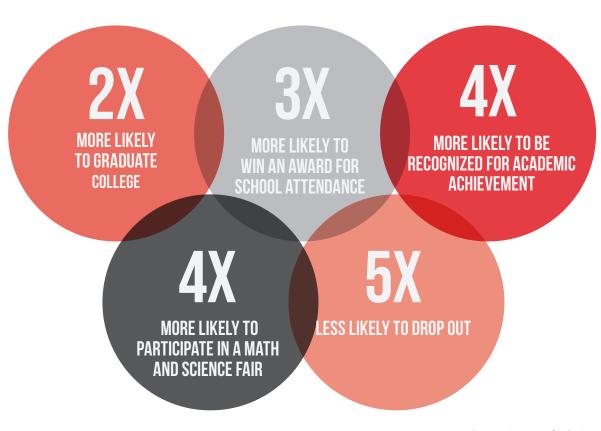
ARTS CONTRIBUTE TO OUR ECONOMY. Americans for the Arts found that nonprofit arts generate \$166.3 billion in economic activity, 4.6 million jobs and \$27.5 billion in government revenue annually. Locally, the arts generated about \$250M in economic activity, created 4,000 jobs, and audiences of more than 4 million people. Music and artistic performances and exhibitions are important drivers of bar and restaurant revenue and other small business services and are attractive to a creative workforce as they choose where they want to live.

ARTS ENHANCE CREATIVITY AND ACADEMIC PERFOR-MANCE. Research shows that students engaged in the arts perform better academically regardless of socio-economic status and that for every \$1 spent on after-school programs a community saves \$9 on other public expenditures. Nobel laureates in the sciences are 17 times more likely to be actively engaged in the arts than other scientists. Creativity is among the top five applied skills sought by business leaders and 91% of Americans believe that arts are part of a well-rounded K-12 education.

ARTS FOSTER ENVIRONMENTAL STEWARDSHIP. Two national studies conducted by the Knight Foundation found that the arts deepen a person's attachment to the place. Stewardship of our local environment and its relationship to climate change, environmental justice and sustainability is fueled by our knowledge of our environment and caring for the place we call home.

ARTS DRIVE SOCIAL CHANGE. Most major movements or societal shifts throughout history have been driven, advanced, revealed, or envisioned by artists. From murals of George Floyd to the spoken word of Youth Poet Laureate Amanda Gorman, the arts enlighten, provoke and inspire. There is a reason dictators and authoritarian leaders fear the arts and its power to inspire a change of mind and spirit. As German Playwright Bertolt Brecht once said, "Art is not a mirror held up to society but a hammer with which to shape it."

STUDENTS WHO PARTICIPATE IN ARTS ARE:



Source: Americans for the Arts

THE ARTS MEAN Business

\$166**B**

Nonprofit arts and culture is a \$166B driver of our national economy.

4.6M

The cultural sector creates 4.6M jobs across the nation.

\$102B

The cultural sector generated \$102B in local spending across the U.S.

\$27.5B

Nationally, the nonprofit arts industry generated \$27.5 billion in government revenue.

7.4%

Arts and culture represent 7.4% of California's GDP.

Sources: Americans for the Arts and Californians for the Arts

KEY INSIGHTS

ARTISTS ARE INFLUENCERS AND RAISE THE VOICES AND IMAGES OF SOCIAL CHANGE

THE ARTS ARE THE ENABLERS OF COMMUNITY Building, place making and cross-cultural Understanding

THE ARTS ACTIVATE PUBLIC SPACES, FUEL SMALL Businesses and help attract a creative Workforce

PARTICIPATION IN ARTS PROGRAMS IS A Game-changer for Kids, families and Communities

THE ARTS REVEAL A REGION'S CHARACTER, ITS Priorities and commitment to place



COVID HIT THE SECTOR HARD

- National unemployment rate for arts workers soared to 21.7% in July 2020.
- The cultural sector lost 60% of its revenue in March 2020 as gatherings halted and people sheltered-in-place.
- National economic loss of nearly \$16B in the cultural sector as of March 2021 due to COVID-19.
- California creative workers made up 59% of unemployed population through July 2020.

KEY INSIGHTS

SILICON VALLEY'S SUCCESS IS ALSO ITS WEAK-Ness when it comes to sustaining its arts Ecosystem

THE LACK OF LOCAL PHILANTHROPY HIGHLIGHTS The importance of government investment in the arts

GOVERNMENT INVESTMENT IS CRITICAL TO THE Arts Role in placemaking, community-Building and access to programs

THE PANDEMIC MADE ACCESS TO THE ARTS LESS EQUITABLE

COVID-19 EXPOSED THE SECTOR'S VULNERABILITY And the need to increase economic security, Equity and dignity for all workers Rina Chang, San Jose Taiko

Pianist/composer Kris Bowers

FEELING THE Squeeze

90%

90% of Silicon Valley philanthropy leaves the region.

\$50k

Average annual income for a culture sector worker in Silicon Valley is less than \$50k.

\$1.2M

The median price of a home in Silicon Valley is \$1.2M.

16%

Top 16% of households hold 81% of regional wealth.



Silicon Valley's income divide grew twice as fast as California and the nation.

Sources: Joint Venture Silicon Valley, The Giving Code and Americans for the Arts

AN UPHILL CLIMB

Silicon Valley is a challenging place to live and work if your livelihood is not connected to our extraordinarily successful technology industries, success that has driven up housing costs, strained transportation systems, and widened the income gap.

RISING REAL ESTATE COSTS MAKE FINDING AND KEEPING SPACES DIFFICULT AND OFTEN OUT OF REACH for housing culture workers, recruiting and retaining artistic talent, and sustaining the business of the arts. Many of these challenges are the same challenges facing others, but talent is the cornerstone of the industry and space is the "delivery" mechanism. The sector cannot operate without both of them.

THESE ECONOMIC PRESSURES ALSO DRIVE UP THE COST OF BUSINESS SERVICES for artists and small- to mid-sized organizations as they struggle to make their art in a high-cost region. The ecosystem's capacity to run their "community serving" small businesses depends on access to affordable business support and expertise outside of their "creative" skill sets.

DESPITE OUR TREMENDOUS WEALTH, RAISING MONEY FOR THE ARTS IS VERY DIFFICULT BECAUSE Silicon Valley immigrants, engineers, and entrepreneurs "lean into" DIY activities and use their philanthropic strength to support global causes, disaster relief, and science and technology. And as Silicon Valley became more broadly diverse, philanthropic investment in the arts became more dispersed and in alignment with a wide range of cultural priorities.

IF AUDIENCES CAN'T COME TOGETHER, ARTS ORGANIZATIONS LOSE THE OPPORTUNITY TO ENGAGE THEM AS PATRONS AND DONORS. Silicon Valley's suburban development pattern and transportation challenges also dilute energy and make bringing audiences and donors together difficult.

COVID-19 ELIMINATED THE ART SECTOR'S ABILITY TO BRING PEOPLE TOGETHER, further undermining its small business model of serving "paying customers" and bridging the gap with donations. The sector quickly pivoted to online content and experiences, which helped them stay connected with audiences, donors and students, but did not pay the bills and at a time that philanthropy rallied around emergency funding for "basic needs."

Artist Chelsea Stewart

FACING OUR CHALLENGES

SVCreates is committed to a series of regional initiatives to build a better community through the arts. These initiatives respond to the financial realities of Silicon Valley and address the challenges of funding, spaces, and business services. They embrace its quirky, entrepreneurial, and start-up culture. And they address the needs of a broadly diverse arts ecosystem that leans small and culturally specific.

A WEB OF SUPPORT

ArtsWeb is a network of shared services and peer-to-peer support for artists, arts leaders, and arts organizations.

A software platform helps connect individual artists and arts organizations with customized business services and offers the support of an Arts Business Navigator and a cohort of peers. ArtsWeb is designed to make the "business of the arts" more affordable and accessible for artists and smaller culturally specific arts organizations. It is being designed and prototyped in Santa Clara and Alameda counties in partnership with Community Vision and with funding from Kenneth Rainin Foundation.

A NETWORK OF SHARED SPACES

Creative Spaces Collaborative is a network of organizations that are creating affordable and collaborative social purpose real estate options for our creative community.

As part of this initiative, SVCreates is partnering with Urban Community to provide shared spaces for seven arts organizations and creative entrepreneurs in San Jose's SoFA district, and with the City of San Jose and Shea Properties to build a creative center in Japantown for San Jose Taiko and 3-4 smaller arts organizations.

Like-minded organization Local Color provides shared spaces for artists in San Jose's SoFA and Diridon districts. School of Arts and Culture at Mexican Heritage Plaza provides performance space for over 30 culturally specific arts organizations. And CreaTV San Jose is leading the development of a multi-use, technology enabled space on Second Street in downtown San Jose with a focus on collaboration, creativity, and civic engagement that will house six to eight arts organizations and be available for community use. As the Valley begins to reopen post-pandemic, the Creative Spaces Collaborative will learn from each other and continue to steward shared space solutions.

A MARKETPLACE FOR ARTS EDUCATION

ArtsEdConnect is a scalable technology platform that connects teachers and school districts to arts education offered by local artists and arts organizations and provides funding to support their work together.

ArtsEdConnect is designed to bridge the arts and creativity gap in Silicon Valley schools and bring joy, learning and skill building to children without equitable access to the arts. In partnership with Santa Clara County Office of Education and with funding from Charmaine Warmenhoven and the County of Santa Clara, nearly 10,000 children are benefitting from having access to arts and creativity each year through ArtsEdConnect, and that number can grow with more resources for unmet demand, especially in Title I schools serving highneed children and families.

A STORYTELLING PLATFORM

Under the artistic direction of founder Daniel Garcia, Content Magazine is the voice of our creative culture heard through its hyper local magazine, podcasts and social media. The Content platform works with local artists in its production and embraces beauty, story, and the soul of Silicon Valley's creative culture. It inspires our region with local artist profiles, insights, and advocacy for the arts. The platform is designed to rise above the churn of Silicon Valley, give voice and access to artists and sector leadership and foster community engagement, pride and understanding of the sector.

A COALITION OF ADVOCATES

Advocacy for good public policy and funding for the arts is getting stronger as leaders are forming coalitions to address issues ranging from a development's % for a public art to affordable housing to public and private funding of the arts and everything in between.

The challenges of a global pandemic have fueled a sense of urgency, accelerated efforts already underway, and brought kindred spirits together. Change takes time, but it begins by working together on actionable strategies that lift up the sector. Arts advocates from SVCreates, Americans for the Arts, Californians for the Arts, American Leadership Forum Silicon Valley, San Jose Arts Advocates, Arts Commissions, and San Jose's Office of Cultural Affairs are actively working together to face the challenges of the sector.

SVCreates' SVCultural Fund and SVCreative Corps are local campaigns to increase institutional funding of nonprofit arts operations, leverage local, state and federal recovery funding, unleash local giving and put artists to work on creative projects and programs of benefit to the community.



LOOKING FORWARD

As with most of the world, Silicon Valley's arts and culture sector did not plan for a global pandemic. But the sector can plan for this moment of reopening and recovery by strengthening its relationship to community and leveraging emerging trends.

THE QUEST FOR SOCIAL JUSTICE HAS MOMENTUM.

The arts have a voice and a following. A voice to challenge our thinking and spotlight inequity, and a following that listens and engages. The arts are a strong community partner for sustaining positive momentum and creating a paradigm shift worthy of all our support.

HEALTH IS TOP OF MIND.

The pandemic exposed our mental and physical fragility, fueled community trauma, shed light on environmental insecurity, and surfaced every other health risk hidden between the cracks of society. The arts are poised to play an essential role in our community's healing, deliver trusted health messages, and help navigate our future informed by these vulnerabilities and the healing power of the arts.

"ROARING TWENTIES" MAY LIE AHEAD

As our federal, state and local governments invest heavily in a safe reopening and as pent-up demand for gatherings and economic activity soars, arts and culture can activate small business, create a sense of belonging, and safely meet the demand for human interaction.

VIRTUAL ENGAGEMENT IS HERE TO STAY

The sector learned a lot about digital content and technology platforms during COVID. As we reopen safely and reconnect with each other in person, we will also use our new knowledge to engage others virtually to augment our offerings, deepen our relationships, and expand our reach.

COALITIONS MATTER.

The sector is stronger together and has the power to demonstrate unprecedented cooperation by crossing the boundaries of possibility for funding, policy, and justice, and centering cultural and racial equity in our collective efforts.

A CALL TO ACTION

GOVERNMENT leaders can adopt public policies that strengthen a more equitable and accessible cultural sector, champion arts funding equal to the economic, social and community benefit of arts, and use their public platform to deepen community understanding of the value of cultural workers and the cultural sector.

BUSINESS AND INDUSTRY leaders can invest money, technology and know-how in the cultural sector, engage artists in their work and the creation of spaces, and encourage other corporate investment in the arts through peer-to-peer recruitment, articulating the business case for the arts and modeling engagement.

FOUNDATION leaders can invest in the cultural sector, inspire and influence others to invest, and use their philanthropic platform to increase donor understanding of the sector while amplifying its value and visibility.

GRASSROOTS leaders can advocate for good public policy, engage in community coalitions and strategies that lift up the arts, and be knowledgeable ambassadors for the arts.

ARTS AND CULTURE leaders can band together to advocate for good public policy and fair treatment of artists and cultural workers, build bridges across sectors by engaging in our community outside of the arts, and nurture and grow donor relationships.

INDIVIDUALS can donate, engage, lead, participate and enjoy the arts!

svcreates.org



NICOLE TAYLOR

President & CEO, Silicon Valley Community Foundation

"The arts is a driving force behind healing in our communities. Artists challenge our thinking, speak truth to power and change hearts and minds. We need to invest in artists and organizations that champion the arts as they can be powerful agents of social change and racial justice."

STEVE WOZNIAK

Apple Inc., Cofounder

"Every child in Silicon Valley deserves the joy, learning and discovery that comes from participating in arts and culture."





CINDY CHAVEZ

Santa Clara County Supervisor, District 2

"The arts are essential to the health and well-being of our entire community. The arts nurture our souls, unleash our creativity, and deepen our attachment to our community and to each other." Cover Image, "HERE & THERE" Mural by Sam Rodriguez Location Eighth St. and Empire, Kiem Service Laundromat San Jose.

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A big thank you to the David & Lucile Packard Foundation, San Jose Office of Cultural Affairs and the Silicon Valley Community Foundation for funding our research work.

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