



**Final Report**

**NEFA's New England Programs:  
Planning for the Future**

**February 17, 2016**



## Final Report

# NEFA's New England Programs: Planning for the Future

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## Executive Summary

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The New England Foundation for the Arts (NEFA) strives to build connections among artists, arts organizations, and funders, powering the arts to energize communities in New England, the nation, and the world. For decades, NEFA has played a leadership role in developing program models that connect high quality artists to audiences and building widespread understanding of the role that the arts play in fostering community vitality.

NEFA enters its 40<sup>th</sup> year of supporting the arts in New England with fresh perspectives based on information learned from artists and presenting organizations through a regional engagement process. NEFA's 2013 strategic plan called for an update of the portfolio of NEFA's regional New England programs<sup>1</sup> to ensure alignment with NEFA's current goals. As part of the portfolio review and planning, we conducted focus groups in each of the six New England states with artists and presenters.<sup>2</sup> Further, we gathered feedback about NEFA's work in the creative economy and with creative communities from participants in the June 2015 *Creative Communities Exchange* conference.

Through the process, we learned how important NEFA's New England programs continue to be for the region's artists, presenters, and communities. We also learned about the challenges currently facing New England's artists and presenters, requiring creative thinking about crafting new partnerships and initiatives to address emerging needs. With that information in hand, NEFA staff and Board have begun to craft the following ideas for **new initiatives** that seem to have high potential to meet unfulfilled needs and advance the arts in the region.

### Knowledge building and making connections

There is high demand for artists and cultural organizers to develop skill and knowledge in many areas, including making connections, marketing and promotion, reaching new audiences, using technology, and sharing strategies. Artists seek professional development structures that facilitate meaningful connections among artists from different disciplines and with presenters. Small and rural presenting organizations seek training and support to take advantage of existing opportunities, e.g., collaborations, partnerships and mentoring.

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<sup>1</sup> New England programs include *New England States Touring*, known as *NEST*, *Expeditions*, the *Presenter Travel Fund*, and the *Creative Communities Exchange*, known as *CCX*, the *New England Creative Economy Network*, known as *NECEN* and research reports and creative economy research

<sup>2</sup> Throughout the report we refer to presenters as those who hire artists and present them to communities—a function which can be carried out by many different types of organizations, including those arts presenters that are organized to primarily present touring artists as well as organizations such as theater groups that both produce and present. We also include cultural and other organizations that are not primarily presenters of touring artists, including museums, libraries, schools, and community centers. We intend a broad definition, recognizing that many different types of organizations are interested in presenting artists to local audiences.

### **Direct investments in artists**

Artists seek support to develop new work. Direct access to resources enables artists to take advantage of creative opportunities and empowers them to reach artistic goals and impact New England communities. Board members favored providing artists with resources to develop new work with the expectation that grant opportunities would be open to diverse art forms and multiple communities throughout New England would be able to experience the work.

### **Engagement of more arts disciplines, especially visual, literary and media arts**

Current touring programs are best suited for distributing work in the performing arts. Fully serving the interests of artists and audiences in other art forms will require new customized initiatives.

### **Research about the creative sector**

State arts agencies and others value highly the role that NEFA plays in conducting research about employment in the creative sector, including learning more about the employment of artists in the region.

### **Adding functions to the *Creative Ground* platform**

As *Creative Ground* is being used by artists and presenters in the region, they see possibilities for enhanced functionality to support existing and new NEFA programs, including connections between community development and the work of artists and presenters.

NEFA staff and Board will use the ideas developed through strategic planning to update the existing New England programs that have served the region well for several decades and work collaboratively with potential funders to craft new initiatives to serve the region for the decades to come.

## I. Introduction: Strategic Planning Activities for the New England Programs

In August 2013 NEFA adopted an updated strategic plan to guide the regional organization from 2014-2019. The plan had three broad goals:

1. *Design and deliver an adaptive, leading portfolio of programs to support the creation and presentation of high quality art which honors traditions and breaks new ground; encourages the development of multiple generations of artists and participants with diverse origins and perspectives; and stimulates community engagement and cultural understanding.*
2. *Strengthen New England's and, by extension, the nation's cultural industry.*
3. *Ensure that NEFA has ample human and financial resources to fully support its mission.*

An immediate action step recommended in the 2013 plan was a review and update of the portfolio of NEFA's New England programs (NEP)<sup>3</sup> to better align the programs with NEFA's current goals. See Appendix A for brief descriptions of NEFA's New England programs. In the summer of 2014, RMC Research was engaged to work with NEFA's staff and Board to conduct a systematic review of the New England programs to ensure the programs meet the goals of the strategic plan and the needs of the region's artists, presenters and other arts organizations, creative economy leaders, and communities, and to identify ways to improve and/or augment programs where necessary. This report documents the planning process and what was learned during various parts of the process as well as the outcomes of discussions about program modifications and new program initiatives.

### **SHAPING THE REVIEW AND PLANNING PROCESS**

Several events and emerging ideas shaped the trajectory of the planning process, as illustrated in the timeline on the next page. Most important was the search for and transition to a new NEFA director; this planning process began at about the same time as the director search was initiated. The new director, Cathy Edwards, was named around the time the Board endorsed the goals for the New England programs. Prior to seeking field input, the planning process was paused to allow Edwards time to help shape the way field feedback would be gathered. Under her guidance, we pursued a state-by-state strategy to gather broad information about the needs and concerns of artists and presenters throughout the region—enlarging the original notion of gathering feedback about the current New England programs from selected audiences. See Appendix D for a list of focus group participants.

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<sup>3</sup> The New England Programs include *New England State Touring, known as NEST, Expeditions*, and the *Creative Communities Exchange, known as CCX, the New England Creative Economy Network, known as NECEN* and research reports and creative economy research.

Another important shift in direction occurred during the initial Board discussion about the New England programs. Board members had ideas for ways to improve the existing programs but when they recognized the potential restrictions of the National Endowment for the Arts (NEA) guidelines that shape New England programs, they became interested in and committed to finding ways to implement complementary new program ideas that might meet the evolving needs of New England communities, artists, and arts organizations, but which could not be funded with NEA dollars. Board members recognized that additional staff time and capacity would be required to undertake the new initiatives. Those new programs could be realized through creating and leveraging partnerships as well as new fundraising efforts. Finally, while we had originally planned to engage a focus group around the creative economy/community development area, we instead used the feedback gathered through the Creative Communities Exchange (CCX) conference in June 2015 to serve the same purpose.

### **Timeline of Strategic Planning Activities**

|   |                |   |
|---|----------------|---|
| <b>Phase I<br/>Board and Staff<br/>Discussions</b>    | June 2014      | <b>Staff discussions about NEFA’s CORE VALUES; suggestions for changes to NEP based on experience with operational and field concerns</b>   |
|   | July 2014      | <b>Board discussion to provide information about NEP and gather initial reactions to staff comments; Board urges NEW program directions as well as adaptations of NEP where necessary</b>     |
|   | Oct. 2014      | <b>Board reviews and endorses GOALS for NEP based on summaries of feedback</b>  |
| <b>Phase 2<br/>Gathering Input<br/>from Field</b>     | April-May 2015 | <b>Focus groups in six states –focus on needs related to presenting and touring (approximately 100 participants)</b>  |
|   | June 2015      | <b>Feedback gathered from participants at CCX about resources and supports related to creative economy/community revitalization (responses from approximately 70 of the 250 participants)</b> |
|   | June 2015      | <b>Staff reviews focus group findings to identify new program options</b>   |
| <b>Phase 3<br/>Deliberations<br/>about Next Steps</b> | July 2015      | <b>Board reviews focus group findings and discusses potential new program directions</b>  |
|   | Aug. 2015      | <b>Board feedback solicited about potential new program directions</b>  |
|   | Oct. 2015      | <b>Staff determine MODIFICATIONS within <i>NEST</i> and <i>Expeditions</i> programs</b>   |
|   | Nov. 2015      | <b>Staff identifies potential opportunities for NEXT STEPS for creative economy research, CCX, NECEN</b>  |

**How NEFA Works:**

*makes connections, builds relationships, develops and shares knowledge*

**NEFA Supports:**

*the creative process, live experiences, opportunities for underserved populations and communities, arts with sense of place, and art with intentional values for audiences and communities.*

**Two key documents.** At several points in the planning process, we synthesized key discussion points into principles and goals to help guide subsequent discussions. Two documents from the initial stage of the planning process are fundamental: NEFA's core values and broad goals for modifying New England programs. The set of core values (see Appendix B) describes hallmarks

of the ways NEFA works: making connections, building relationships, and developing and sharing knowledge; and what NEFA supports: the creative process, live experiences, opportunities for underserved populations and communities, art with a sense of place, and art with intentional values for audiences and communities.

The goals for NEP modifications with examples of implications (see documents in Appendix C) were presented at the October 2014 Board meeting and were positively received. These documents represent the collective thinking at the time about the need for specific program modifications and options for responding. Broadly, the goals seek to:

- Create opportunities for an increasingly wide range of New England artists, including those who represent varied art forms;
- Work with a wide and diverse range of organizations that bring artists to communities, including non-traditional organizations as well as known arts presenters;
- Develop better strategies for increasing participation and access to reach new audiences;
- Make connections among NEFA's programs to create greater opportunities;
- Support tour planning processes to ensure success and wider reach;
- Increase the visibility of artists, presenters and NEFA;
- Broaden the participation of other sectors in creative economy and community development work, including leveraging connections with other types of regional associations and funders;
- Increase the participation by the creative sector in community planning and development; and
- Highlight NEFA's and the region's profile nationally as a vital creative economy to continue to attract resources to the region.



## ORGANIZATION OF REPORT

This report is a summary of the information we gleaned from the field during Phase 2 of the planning process and the subsequent staff and Board deliberations about the possible directions suggested by the feedback. The information gathered from the field which was rich and wide-ranging is presented in four sections:

- II. Serving New England's Artists
- III. Bringing Artists to New England Communities
- IV. Knowledge Building and Making Connections
- V. Serving Communities and the Creative Sector

In a final chapter we present recommendations for future action that collectively we have derived in response to the field input. The chapter also includes comments on the changing context in New England that was a common theme in discussions, perspectives that were shared about NEFA's unique position to accomplish important goals, and thoughts about how to move forward.

## NOTES ABOUT DEFINITIONS

**Presenter or presenting organization.** Throughout the report we refer to presenters as those who hire artists and present them to communities—a function that can be carried out by many different types of organizations, including arts presenters that are organized to primarily present touring artists as well as organizations such as theater groups that both produce and present. We also include cultural and other organizations that are not primarily presenters of touring artists, including museums, libraries, schools, and community centers. We intend a broad definition, recognizing that many different types of organizations are interested in presenting artists to local audiences.

**Touring.** We use the term touring to refer to distribution of all forms of art work, recognizing that the term is often associated with the performing arts but can be applicable to many forms. Note: NEA guidelines that govern the use of touring funds are generally limited to inter-state tours—a limitation that was frequently noted by field participants.

**Art forms.** We recognize that NEFA's grantmaking has most frequently been associated with the performing arts of theater, music and dance; however, in this report we refer to diverse forms beyond the performing arts and including visual arts, media and film, literary arts, and cross-disciplinary work.

## II. Findings: Serving New England's Artists

In this section, we highlight information relevant to meeting the needs of artists in the region, beginning with the broadest picture of concerns and suggestions and then addressing more specific ideas about modifying NEFA's existing New England programs. One of NEFA's major goals for gathering feedback from artists was to address the goal of encouraging and supporting an even wider range of New England artists, including continually increasing connections to artists from diverse communities (i.e. artists from all ethnic/racial backgrounds and traditions, emerging as well as established artists) and artists who work at both large and small scale as well as in many different forms, including art forms that typically have not been supported in NEFA's grantmaking (e.g., visual arts, film, literary arts).

Artists were well-represented across the six state focus groups; about one-third of all participants identified as artists. As one would expect, the artists included dancers, theater artists, musicians, photographers, and songwriters, and the group also included a magician, puppeteer, writers, installation artists, and performance artists. Most of the artists are already experienced in touring and connecting with communities in varied ways; some are more locally based but interested in expanding their work to new communities. The group included solo artists as well as small ensembles and artists who represent other artists. In the conversations, other participants also spoke to the needs of artists, including the many large and small presenters who added information about the concerns of the artists who they frequently present or would like to present.

### *WHAT WE LEARNED ABOUT NEEDS AND CONCERNS OF ARTISTS*

*In broad terms, artists are most interested in: (1) support for development of new work, including funding opportunities that artists can directly access; (2) professional development and access to information and tools that will help them take full advantage of opportunities already available in the region; and (3) building relationships with presenters and other arts organizations to ensure organizations are knowledgeable about artists based in the region.*

Details of the conversations about artists' needs are aligned with the initial goals that NEFA's staff and Board set forth for improvements to the New England programs, and also suggest some potential future directions. The items below represent priority issues that were raised across several of the focus groups and/or by a number of individuals within groups.

- Artists believe there are very few resources available to New England artists for the **development and incubation of new work**. Artists who have been working in small venues

often need support to develop or adapt work for larger venues. The landscape has changed over the past decade and artists are feeling the effects of the decline in state arts agency support for development of work, e.g., artist fellowships that enabled some artists to develop new work. Artists noted that other NEFA programs (e.g., *National Dance Project* and *National Theater Project*) support both development and refinement as well as distribution of work, and believe the same combination would greatly benefit the arts in New England, making regional artists more competitive within other opportunities. Some artists raised the related issue of artists applying directly for funding instead of the current practice of limiting eligibility for grants to presenting organizations (see more below).

- Artists believe there are very few resources available to New England artists for **professional development**. Emerging artists say they could benefit from mentoring by more experienced artists to assist in learning about presenting in the region. One information need that artists are calling for is guidance in navigating the funding systems in the region.
- Touring artists described their needs for modest **operating support** (beyond fee support for a performance). They often find it difficult to fit their needs into fixed grant criteria and expressed the desire to “state their case” for funding by describing the unique combination of their work and its purpose, how they work, the intended audiences, and the characteristics of their locales.
- Both artists and presenters are clear that artists in New England are increasingly engaged in **cross-disciplinary work**, for example, combining installations or other visual arts with performances. Artists in New England are experimenting with media in all formats. Some artists are mixing traditions with newer forms. Artists and presenters want to be sure that grant opportunities are open to performing, literary, visual, and media arts and in various combinations.
- **Artists desire more equity in the collaborative relationships required for planning tours.** Some artists feel existing grantmaking processes and criteria leave them disadvantaged in the relationship with organizations that hire and present artists and when grantmakers only fund institutions, they are further disadvantaged. Within the current NEFA grant programs that do not fund artists directly, artists gave examples of associated problems: partnerships that fell through at the last minute after they had invested a lot of effort in preparing the groundwork for grants; being left out of the communication loop, including not being notified in a timely way even about a successful grant. Both artists and small presenters can be overwhelmed in attempting to work out collaborations for touring, especially when multiple venues/sites are required.

- Artists strongly desire the opportunity to learn more about presenting organizations and **build relationships with organizations that hire and present artists**, especially in casual circumstances and via a variety of venues. They desire multiple opportunities to make connections with organizations throughout the region. While artists value online platforms, they feel that there is no substitute for personal introductions that open the door for future contacts.

### *SUGGESTIONS FROM FOCUS GROUPS*

Participants in the focus groups brought forth suggestions for NEFA (and others such as SAAs and private funders) to consider in response to their concerns. In some cases, they commented on and expanded ideas that NEFA staff and Board had already identified as possible modifications to New England programs.

1. **Development of work.** While participants realize that NEFA can only do so much by way of commissioning or supporting new work, they suggest that NEFA could be a catalyst for collaborations with other funders to support development of new work by New England artists. In addition to NEFA raising private funds for direct grants to artists, suggestions also included NEFA raising funds to assist experienced arts organizations, including producing organizations and others, to provide commissions with ongoing development support to artists. There was some discussion that new work development grant opportunities should not be overburdened with fixed expectations about touring.
2. **Residencies.** Some artists who are experienced in the traditional model of touring in the region believe that single-event presentations no longer are satisfying to them or to local communities. They are interested in longer and/or repeated residencies in communities to allow for deeper and/or more extensive engagements. Some artists want to rethink how they are engaging with communities.
3. **Visual arts, media/film, literary arts.** There was general agreement that the current touring guidelines and models don't fit well the art forms outside the performing arts. While acknowledging that some combinations might work within current guidelines, e.g. several venues presenting an installation combined with a performance artist, most felt that new tailored program initiatives are needed to distribute visual arts, media/film, and literary arts throughout the region. If NEFA invests in the development of work (see #1 above) this could support artists working in all disciplines.
4. **Professional development.** There were lots of ideas for ways to meet the professional development needs of the region's artists, especially those who are young, emerging, and/or

new to the region, located in rural areas, and/or operate as solo artists. Suggestions include a mentoring program that would pair experienced with less experienced artists; webinars designed to explain funding and performance opportunities; and a “help desk” to provide advice and information. Participants who were familiar with NEFA’s Regional Dance Development Initiative (RDDI) praised the model as a template from which to build future professional development efforts, especially for its benefit of building sustainable partnerships of artists and presenters.

- 5. Direct funding of artists in current NEP programs.** There were different opinions about whether NEFA’s current grant funding opportunities should be made available directly to artists (rather than the practice of providing the grants directly to institutions). Some who favored direct funding believe that some artists are in an excellent position to organize and identify opportunities to bring their work to the public; others don’t want artists to have the burden of proposal preparation and reporting. Yet others valued the role that presenting organizations play in vetting artists for their own communities, and note that many artists may have difficulty gaining access to venues. (Direct funding to artists in new initiatives is discussed further in Section VI.)

### III. Findings: Bringing Artists to New England’s Communities

In this section, we provide information that is parallel to the previous section, highlighting information relevant to meeting the needs of organizations in the region that hire and present artists. As in the previous section, we begin with the broadest picture of concerns and suggestions and then address more specific ideas about modifying NEFA’s existing New England programs. One of NEFA’s major goals for gathering feedback from presenting organizations was to address the goal of encouraging applications from a wide range of New England organizations, including, small, new and rural organizations, and providing assistance and support for robust tour development by facilitating collaborations among tour partners.

Presenting organizations were very well-represented in the six state focus groups; about two-thirds of all participants identified themselves as representatives of presenting or producing organizations. Presenters included several of the region’s major performing art centers and university presenters as well as contemporary art centers/galleries, film festivals, book festivals, small town opera houses, theaters, and community centers. Smaller presenters were the dominant members of several of the groups. In the focus groups, artists also spoke to the concerns relevant to organizations that present them.

## WHAT WE LEARNED ABOUT NEEDS AND CONCERNS OF PRESENTING ORGANIZATIONS

*In broad terms, presenting organizations, especially the smaller ones, are most interested in help to take advantage of the opportunities already available in the region.*

Details of the conversations about presenter's needs were well aligned with the initial goals that NEFA staff and Board set forth for improvements to the New England programs, and also suggest some potential future directions. The items below represent priority issues that were raised across several of the focus groups and/or by a number of individuals within groups.

- Smaller presenting organizations find **grant preparation** a challenge. They often weigh the possibilities of getting a grant with the investment of time required to be successful, and if successful, the stresses involved on a small organization in managing grants. These concerns are especially true of the small organizations who may have only one or a part-time paid staff member.
- The typical grant **timelines** don't fit well the schedule constraints of small presenting organizations which may not be able to make commitments very far in advance—this was especially a concern with respect to *Expeditions* grants, and also true in cases when short-term opportunities arise. Small organizations do have the advantage, however, of being able to be nimble and opportunistic.
- In a similar way, committing to raising **matching** dollars in advance can be a barrier in addition to raising the required amount of the match itself.
- Presenting organizations are very interested in **multi-venue tours** but the level of advance preparation and collaboration required to put together a successful tour can be difficult especially when presenters and artists are geographically distant.
- Small presenting organizations are especially interested in presenting artists who are **located closer** to them, believing that that will afford a better opportunity to build audiences for artists which they can then sustain over time.

## *SUGGESTIONS FROM FOCUS GROUPS*

Participants in the focus groups brought forth suggestions for NEFA (and others such as SAAs and private funders) to consider in response to their concerns. In some cases, they commented on and expanded ideas that NEFA staff and Board had already identified as possible modifications to New England programs.

1. **Matching funds.** Participants in focus groups had a variety of ideas for how to help small organizations raise matching funds for grants. First, while no one suggested eliminating matching requirements, they believe that different circumstances, e.g., a rural organization in an underserved area or a pilot opportunity, might call for a match less than 50 percent of the fee (recognizing that the suggestion may not be feasible within current NEA guidelines). Second, the match might be generated from a “door split” rather than advance commitment. Third, there may be alternatives for what could be considered match, e.g., various types of in-kind support. Finally, similar to the suggestion made by some artists, some of the match might be credited toward grant administration.
2. **Large presenter-small presenter “piggyback” tours.** There was a lot of interest from both large and small presenting organizations about findings ways to “add on” venues to tours supported by the *Expeditions* program which mostly involves larger presenters. For example, while a small organization wouldn’t necessarily be in the position to host the full presentation of an artist ensemble, there may be a way for a nearby small organization to host a complementary activity, e.g., a master class, work-in-progress showing, one portion of a performance, and so forth. The intention would be to help smaller organizations build their audiences in a low-cost, low-burden manner without detracting from the primary tour venues. This approach could partly respond to the interest in creating more nimble opportunities.
3. **Collaborations between large and small organizations.** In addition to the ideas above, there was lots of interest in building relationships among large and small organizations with the belief that NEFA staff have the knowledge to assist in facilitating those relationships. Everyone recognized that such relationships require special incentives and commitment from large arts organizations to build the regional arts ecology. They won’t simply happen and be sustained without external encouragement and support. Participants believe that NEFA could take a proactive role, making suggestions for mentor presenters to be matched with new and/or smaller presenters who are stepping up to take on more challenging events. They also suggested that NEFA could potentially help to form partnerships among organizations that could

be incentivized for the initial presentation but then sustained independently. This concept could also apply to partnerships among smaller organizations, e.g., setting up a partnership among three to four compatible small organizations located throughout the region for a mini-tour circuit.

4. **Short-term/opportunistic grants.** Everyone recognizes the amount of advance planning required for major touring projects with multiple venues; clearly, those grants require planning well in advance of the tour schedule. However, participants would also like to see other types of shorter term grant opportunities that allow them to take advantage of emerging circumstances (e.g., one site on a touring circuit falls through and other venues are available) or take a risk on new artists.
5. **Knowledge building.** All presenting organizations, but especially smaller presenters feel they are “out of the loop” in terms of knowledge of artists in the region. It is difficult for them to preview a range of artists since they are often not part of the networks that help larger presenters do their jobs. Suggestions were support for travel, showcases, technological opportunities to be introduced to artists who might be right for their venues, and support for participating in the existing regional networking/conferencing opportunities to see artists. Many are daunted by the amount of information on *Creative Ground* and would value curatorial structures and functions to help them locate artists of interest to their communities.
6. **Special funding and incentives.** Much like the discussion in Section II, in order to become competitive, small, rural, non-traditional, and first-time applicants may need special consideration, which could come in the form of separate funding pools within existing grant opportunities, additional points added to criteria, and/or special competitions. Special funding might combine planning grants plus touring support with mentoring assistance for tour planning; further, such funding could be targeted to New England artists on tour. When first-time applicants are not successful in grant competitions, it is important that to reach out to them to ensure that they receive feedback and support.

#### IV. Findings: Knowledge Building and Making Connections

In this section, we provide information that cuts across the interests of artists and presenting organizations about support for networking, promotion, and creating visibility to potential audiences.



## WHAT WE LEARNED ABOUT NEEDS AND CONCERNS IN THE KNOWLEDGE BUILDING AND MAKING CONNECTIONS WITH PEERS, PARTNERS, AND AUDIENCES

*Both artists and small organizations want to make themselves more visible to each other and to the region's audiences but are hampered by lack of marketing resources, including professional "know how." They are keenly aware of their needs for information to help them make more connections, especially to potential audiences.*

The items below represent priority issues that were raised across several of the focus groups and/or by a number of individuals within groups.

- Many of those in the focus groups—**both artists and small presenters**—**feel somewhat isolated** and unsure how to create and/or enter broader networks to build relationships that they perceive could be helpful in furthering their professional goals. They are seeking more and deeper connections to cultural actors throughout the region and believe that NEFA is an ideal intermediary for making those introductions. Small organizations are often not members of the existing networks through which they could be introduced to a variety of artists in the region. Artists are also interested in learning more about how to make connections outside the region as well as in New England, through other regional arts organizations, for example.
- Artists and arts organizations are most concerned about **building audiences that can be sustained**. The survival of arts organizations depends on meeting the interests of local audiences and, at the same time expanding their current audiences' artistic interests and continually seeking to engage new audiences. Artists' perspectives are even more complicated: they need to develop a following, local and non-local, build relationships with their audiences (often at a distance) and also cultivate relationships with organizations that can be sustained over time. Many factors affect the success of this objective: relationship-building between artists and presenters is fundamental; adequate investment in marketing poses a challenge to artists and presenters; frequency of contact/communication between audiences and artist is key.

Current *NEST* guidelines are designed to promote touring across state borders; the effect is that the distance between artist and audience is necessarily greater, making it more difficult to build audiences. Both organizations and artists believe that support for presenting artists located geographically closer to home audiences would offer a better opportunity to build the interest of audiences over the long term.

- Presenters frequently noted that some **artists' communications and marketing approaches do not serve the work well**. They believe that some artists could learn to talk about their work more effectively which would enable them to better connect with presenters and facilitate promotion to potential audiences. In the focus groups, artists also acknowledged the communication gap with presenting organizations, and were dismayed by the lack of opportunities to showcase their work for presenters which they believe essential to promotion and relationship building.
- **Lack of familiarity** with New England-based artists was cited as a barrier, especially by small presenting organizations who may lack the resources to do much in the way of marketing and promotion. The need is exacerbated by the resource limitations that artists experience, meaning that they may not have invested in the type and quality of promotional materials that will attract audiences. Presenting organizations noted that the more isolated and rural the community, the greater need for well-known artists to attract audiences.
- Both artists and presenting organizations recognize that **technology** (via *Creative Ground* or similar platforms) **can play a role in providing background information**, but at this point are not satisfied that technology alone is a viable way to facilitate connections and create opportunities. They see potential in *CreativeGround* to meet more of their needs through interactive options such as bulletin boards, message postings, sorting functions (e.g., a menu of presenters who specialize in/are interested in presenting a particular form), and so forth.

### **SUGGESTIONS FROM FOCUS GROUPS**

Participants in the focus groups brought forth suggestions for NEFA (and others such as the SAAs and private funders) to consider in response to their concerns. Some of the ideas will require new external funding.

**1. Facilitating relationships.** Participants expressed a great deal of interest in NEFA taking a more active role in making connections between artists and potential presenters of their work. They have a lot of confidence in NEFA's "honest broker" role and value the deep knowledge of NEFA staff. Participants like the *Idea Swap*, desire even more showcases, and especially want informal, more casual opportunities where artists might meet representatives of presenting organizations. Participants had ideas about how to accomplish these objectives such as invitational "get acquainted" webinars for small groups of artists and organizations, curated and facilitated by NEFA staff. Or, even more directly, several suggested that NEFA curate different types of current touring "artist rosters" that might highlight groups of artists engaged in related

work, e.g., a roster of a small set of diverse regional artists whose work is related by theme or form.

**2. Building marketing capacity.** Participants understood the challenges associated with finding resources to dedicate to marketing, recognizing that a substantial investment at the organizational level is required to make a difference. But most agreed that there is a need for more professional development to build marketing capacity, including ways to understand return on investment, build cooperative marketing campaigns, reach targeted audiences, and use social media effectively to increase visibility. Presenting organizations and artists both believe it would benefit artists if there was a “safe” way for expert consultants as well as presenters to provide feedback to artists about their promotional strategies, media, and materials.

**3. Connecting familiar and lesser known artists.** Participants in focus groups suggested several ideas to develop audience interest. One idea is to support small organizations to present a local artist on the same program as an out-of-state artist, giving exposure to local artists and at the same time expanding audiences’ horizons with new opportunities. Another idea is to offer smaller and rural organizations an occasional subsidized opportunity to present artists with name recognition to build local audience affinity with the venue.

**4. Add functionality to *Creative Ground*.** Participants were familiar with the technology platform and many had tried to use it to locate and make possible connections. They believe the platform could be enhanced with features that would make it easier to use for marketing and encourage best practices in promotion. For example, an enhanced search function might allow artists to create profiles of the type of presenter they think would be interested in their work. Further, when new artists add profiles to *Creative Ground*, presenters might receive automatic alerts. Periodically, the platform could highlight a cluster of artists such as small dance ensembles that are *NEST*-supported.

## V. Findings: Serving Communities and the Creative Sector

In this section, we highlight information about addressing the needs and interests of a wide range of individuals in the region who are engaged in community revitalization through the creative sector. Most of the ideas in this section were provided by the participants in the June 2015 *Creative Communities Exchange (CCX)* gathering in Keene, NH attended by 250 individuals from the entire region; they were asked to reflect on the types of resources and support that would help them further the goals of integrating the arts into other sectors of economic and community life in New England. Given this

context for gathering information, we sought broad ideas from the conference participants rather than asking them to react to specific NEFA programs. NEFA staff's goals are to engage all types of communities, broaden participation from sectors beyond the arts while engaging artists and arts organizations in other sectors, and expand efforts beyond economic vitality to all types of community revitalization.

At the CCX conference, participants were asked directly about their needs and ideas for support. They also provided suggestions in their feedback about individual sessions and via conference evaluations. We have supplemented the ideas from CCX participants with suggestions that have come from past discussions among NEFA staff and Board members.

### ***WHAT WE LEARNED ABOUT NEEDS AND CONCERNS RELATED TO CREATIVE ECONOMY RESEARCH, EVENTS, AND NETWORKS***

*In broad terms, the ideas for future support are in three categories: (1) the creation of tools and processes to facilitate cross-sector community collaborations that include a robust role for the arts; (2) building capacity of the arts community to support work in community revitalization; and (3) continuing to quantify and highlight the creative sector in New England in new ways.*

The needs and interests were very wide ranging, reflecting both the relative “new-ness” of integrating arts with other sectors to achieve community outcomes and the broad spectrum of individuals and organizations interested in these goals. As would be expected, the ideas from the CCX participants expanded well beyond prior discussions among internal staff and Board. Understandably, many more needs have been identified than could possibly be addressed within NEFA's current New England programs. The needs and interests listed below represent the major themes that were raised by a number of individuals.

- As any CCX agenda illustrates, there are many possibilities for community revitalization initiatives that involve the arts, ranging from integration of new immigrants and engaging public housing residents in community activities to addressing tensions among neighborhoods. In fact, the **options can seem almost overwhelming** to community leaders interested in exploring what might work in their own contexts. Leaders are typically looking for “quick wins” and they want to learn from others how to maximize efficiency and achieve success: *How to get started? Who to involve? What's a reasonable expectation? What are the communities to learn from? Are there sources of funding?*

- NEFA’s network and conference gatherings have demonstrated that people from all over New England are energized by examples of cross-sector collaborations that include the arts. They have also learned that **cross-sector collaborations can be challenging** for a variety of reasons, including overcoming the communication barriers that arise when people with different professional perspectives begin to work together toward common goals. Each sector has its own terminology, priorities, standards, methodologies, opportunities, and incentive structures. Obviously, people of good will in many communities have overcome those barriers and carried out admirable initiatives that have contributed to community developments—and they have lessons to share with others about getting through the “rough patches.”
- Leaders who are embarking on revitalization initiatives that involve the arts will face skeptics who are **not convinced of the value of applying the arts** in different sectors. They want to be able to articulate expected outcomes with confidence, drawing upon examples of successes in other communities. Arts leaders especially want to be able to articulate the value of the arts in reaching a variety of outcomes associated with community revitalization, e.g., safer communities, economic vitality, creation of more viable public space, and so forth.
- Arts strategies can play a special role in the **processes associated with cross-sector collaboration**, i.e. strategic planning, engaging reluctant participants, dealing with difficulty issues, relationship-building. Communities have used visual arts participation, storytelling, theater and performance in many ways to further community outcomes. Participants wanted more ideas for using arts strategies in their community work.
- In some cases, individuals need external **support to figure out the best way to engage other sectors**. For example, members of the arts community may not have had experience in working with particular sectors, e.g., transportation providers, health care, or subgroups within the community. In some cases, external facilitation may be helpful to bring together leaders from different sectors into productive dialogue.

Two other needs come from previous discussions with NEFA staff and Board members, particularly the State Agency directors, about needs and interests relative to information about the creative sector in New England:

- **State arts agency leaders rely on NEFA’s creative economy research and creative sector employment information** which they have used in advocacy with their state legislators to support allocations to the arts. For years, they have looked to NEFA as one of the major sources of data about the creative sector, especially the nonprofit sector, and they especially value trend

information which facilitates comparisons over time. State arts agency leaders are eager to have additional data about artist employment to augment data about the creative sector occupations and industries.

- While past data about the economic impact of the creative sector has been valuable for advocacy, NEFA staff and leaders are interested in **ways to maximize data use**, especially given the effort required to analyze and report the information. *How can economic impact data can be used for purposes beyond general advocacy, e.g., planning new activities, spotlighting best practices, etc.? Beyond state arts agencies, who are other potential users of the economic impact data?*

### **SUGGESTIONS FROM CCX CONFERENCE PARTICIPANTS**

CCX participants raised some suggestions for NEFA and others to consider in response to the needs and interests they expressed. We have augmented suggestions from the CCX participants with additional ideas that might address some of the needs. We believe that the ideas and topics identified below offer a menu of options that could be incorporated and disseminated over time within familiar NEFA mechanisms such as NECEN networking meetings, webinars, blogs/monographs, and future CCX gatherings.

### **Toolkit Resources to Support Communication and Initiative Development**

- 1. Organizing structure.** Community development/revitalization through the arts represents a blend of ideas emanating from a variety of sources and different sectors of the economy. There isn't a single well-known or widely shared framework to guide planning discussions. To further this field, NEFA could work with other leaders in the field of community revitalization to develop a taxonomy of cross-sector initiatives that incorporate or are led by the arts sector. Such a tool would help members of the field expand their ideas about what is possible and serve as a structure for organizing other resources such as community profiles and provide a structure for strands within conferences.
- 2. Compilation of existing resources.** There are many possibilities for documents, tip sheets, and other reference documents to fill in information gaps. For example, arts organizations might benefit by information about working with other sectors, perhaps in the form of a short introduction to the functions of planning departments and economic development agencies/corporations. Of special interest would be information about funding mechanisms that members of the arts community might not be familiar with (e.g., tax increment financing, tax

credits, special assessment districts). Another type of support would be a resource pool or speaker's bureau of experienced individuals who can assist other communities.

**3. Models of effective strategies.** Members of the arts community are eager for definitive research that illustrates the value of incorporating the arts in community revitalization strategies. They're looking for a small number of "sure fire" credible examples that can be used in local advocacy. In other fields it is sometimes the practice to convene panels of experts to create authoritative syntheses of outcomes from varied studies. Such meta-analyses produce generalizations about the types of strategies that are most likely to produce desired outcomes.

**4. Outcomes and measures.** Local community practitioners are eager to document and assess the results of their initiatives but rarely have the resources to engage professional evaluation support. Any community profiles (see below) that are developed should clearly describe intended and attained outcomes (e.g., increased retail activity, improved sense of belonging to community, positive views of neighborhood), and methods used for assessment. Another option is a menu of types of outcomes that are common to cross-sector collaborations in communities along with suggestions for approaches to measurement and examples of documentation formats, survey examples, and secondary data sources (e.g., property valuation records).

Municipalities, counties, regions, and states (as well as the federal agencies) collect data on a regular basis that could be of value in both understanding opportunities and gaps and also in tracking the results of initiatives. Examples include county employment data by industry, commercial property valuations by neighborhood, building permits, retail sales, accommodation and food service sales, homeownership by population group, and so forth. A useful reference would be a catalog of types of extant data sources and potential ways to use the information in conjunction with community revitalization projects that integrate the arts.

## Research and Data Analysis

**5. NEFA-produced analyses/reports.** NEFA has a track record of providing foundational reports about the creative economy in New England that have provided descriptive and trend information. Conducting the appropriate analyses and producing definitive reports is a time-consuming and expensive undertaking so NEFA staff are seeking ways to collect information efficiently (e.g., using *Creative Ground* profiles as an opportunity for updating organizational information and artist employment information) and reaching out to other researchers (e.g., NEA, AFTA as well as regional work) to ensure that NEFA's work complements analyses that others are carrying out. To enable advocates to work with information about trends in the region, essential information includes periodic updates on creative sector occupations and

industries by state, including additional information about artists. In addition to including more information about artists in economic profiles, broader information about artists in the region could be useful—who they are, where they are, how they define their work, and how they distribute their work.

## New England Examples

**6. Practical profiles.** Community members want to learn from other communities; of course, in-person exchanges are always best but not an efficient way to reach many communities. The most useful profiles will provide details about start-up, implementation, and results along with practical tips and tools that others can use (e.g., how to do asset mapping, methods of gathering input, sources of funding). Most useful would be a variety of examples that illustrate the instrumental value of the arts within different sectors and in varied community contexts. It is always helpful to learn about the strategies that others have used to overcome obstacles and make course corrections. The raw material for a number of community profiles already exists from past CCX gatherings; tagging and organizing information into profiles would make them more useful.

**7. Creative clusters.** It's clear that New England has many geographic areas of creative economic activity—clusters of interconnected creative businesses, suppliers, and associated organizations in a particular field. Some clusters are well-known (e.g., the jewelry design and manufacturing industries in Rhode Island) but other clusters may not be obviously components of the creative economy. Identifying and making visible cluster information is one way to transform the uses of information collected through creative economy reports. Ideas include: mapping creative clusters throughout New England; creating profiles of particular clusters and the creative industries within them, including linkages among artists, industries, and nonprofit organizations. Trends showing cluster growth and decline over time would provide information about opportunities for investment.

**8. Training and exchanges.** Participants in the CCX gathering expressed interest in additional learning opportunities which could take many forms—webinar series, peer-to-peer structured exchanges, informal virtual or in-person discussions. Areas for potential professional development: cross-sector leadership development seminars; peer-to-peer structured visitations to learn directly about initiatives in context; introductory sessions built around any of the resources discussed in above, e.g. a webinar that presents financing options that have been used to develop initiatives or a series of sessions that are built around profiles of operational initiatives with the opportunity to engage with local leaders; and relevant practical skills-based



training aimed especially at arts professionals (e.g., methods for gathering input from community members through surveys and interviews; use of social media for engagement).

**9. Broadening participation in NEFA-sponsored activities.** NEFA staff continue to be interested in finding ways to expand the roles and leadership of other sectors in CCX and NECEN activities; for example, it might be possible to co-sponsor exchanges in conjunction with other sectors, e.g., a transportation/arts-focused gathering.

## VI. Recommendations for Next Steps

We encouraged field practitioners to be wide-ranging in their discussions of needs and solutions, and not limit themselves to their understanding of what NEFA might be able to accomplish within current resources. Indeed we hope that some of the ideas will be taken up by state and local arts agencies as well as private funders. The next challenge for NEFA staff and Board members will be to sort through the suggestions and determine which ones NEFA is best positioned to address. Some of the ideas that emerged through focus groups and staff and Board discussions are possible to execute within the existing New England programs by making modest adjustments to guidelines, providing additional information, and augmenting examples.<sup>4</sup> Other ideas are possible to execute only with additional funding because the NEA guidelines governing the use of grant funds may not currently permit the desired change nor would the current NEA funding be adequate to support the new ideas.

Because we framed the focus groups as opportunities to learn about the needs of artists and presenting organizations throughout the region and asked CCX participants about desired resources and supports, we opened up conversations that extended well beyond modifications of current New England programs. The resulting richness of information led to several different types of syntheses:

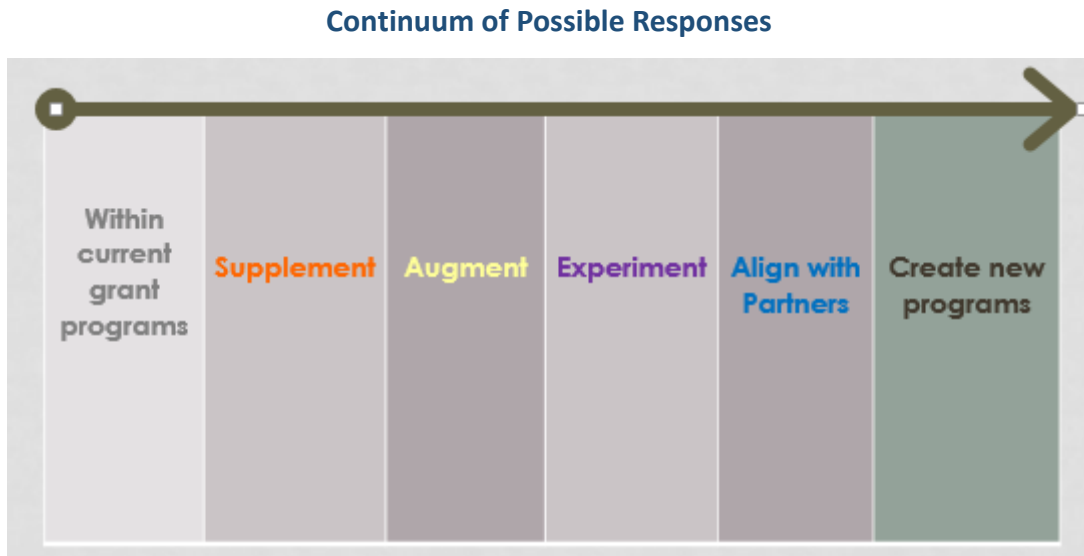
- a set of options to consider for new programs aimed at both individual artists and organizations; and
- directions for creative economy/community revitalization initiatives, including ideas to supplement existing strategies and pilot new ideas.

In considering the options, we were mindful of the changing context in the region that affects needs and choices, NEFA's position in the cultural landscape, and the range of ways to respond to needs, including the possibility of raising additional funds for new programs.

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<sup>4</sup> Examples of such modifications include outreach to varied networks; providing examples within guidelines of visual arts, film and media, and literary arts; supporting the addition of venues once tours are confirmed.

**Approaches to meeting needs.** In considering ways to respond to the many ideas that were raised, we were mindful of the need to be realistic about resources and capacity. But we also recognize that there are different levels of response ranging from simple modest changes to the creation of completely new program initiatives. The continuum below illustrates the different levels of response:



While we originally started with the intention of making modest alternations within current grant programs, Board and field input led us to thinking about possible responses along the full continuum, including raising additional resources for creating new program initiatives. Discussions of *NEST* and *Expeditions* led to suggestions for both making modifications within the current grant program as well as creating new programs. Discussions about creative economy/community development initiatives centered on ideas for experimentation or variation within the existing programs as well as alignment with the work of others.

**Changing regional and national contexts.** Several themes were raised repeatedly during focus groups as well as staff and Board discussions that explain the urgency of particular needs and give shape to priorities. The landscape nationally and in New England has changed in many ways since the New England programs were first conceived. A few highlights: the audiences for the arts have been changing: the region’s population has become much more diverse through in-migration, immigration and refugee resettlement, and rural areas, especially in the northern states, are experiencing rapidly declining populations. Technology has affected the way that audiences consume culture; in some cases, younger audiences who have had less exposure to arts education may not have developed an appetite for live performances. Artists and presenters find it increasingly challenging to locate financial support as state arts agencies have reduced support for touring and presenting. Since the 2008 recession, some funders

have prioritized funding for human service agencies and education, making it more difficult for artists to access resources for development of new work.

**NEFA's position.** From focus group participants we heard about their expectations of NEFA and its unique position to respond to the needs of the cultural field. As a regional organization, NEFA can provide an independent perspective and foster partnerships. Participants placed high value on NEFA as a collaborator and partner and have confidence in NEFA's processes to determine quality. NEFA has a track record of developing successful program models (e.g., *RDDI*, *CCX*, *Building Communities through Culture*) that have worked in the region and beyond. Arts organizations trust the NEFA brand. They also believe that NEFA staff are knowledgeable about and can help others focus on best practices. It isn't surprising then that there is a strong interest in having NEFA staff more actively involved in making connections on their behalf and curating showcase opportunities.

### ***OPTIONS FOR NEW PROGRAMS FOR ARTISTS AND PRESENTERS***

In June 2015, we met with NEFA staff and then subsequently with the NEFA Board to work with the findings from focus groups to identify priorities for feasible ways to address the greatest needs. Below are those ideas with the highest potential to meet unfulfilled needs and advance the arts in the region.

**Professional development for artists.** There is high demand among artists for opportunities to develop skill and knowledge in many areas including making connections with presenters, marketing and promotion, reaching new audiences, using technology, and sharing strategies with other artists. Artists especially like the idea of professional development structures that facilitate meaningful connections among artists from different disciplines and with presenters. Board members expressed enthusiasm about supporting cohorts of artists through leadership development opportunities that would combine professional development with networking and mentoring. NEFA has a track record of developing and executing professional development/engagement models and is well respected in this role.

**Artist grants.** Artists described the dearth of support for development of new work. Board members also favored providing artists with resources to develop new work with the expectation that grant opportunities would be open to diverse art forms and multiple communities throughout New England would have the opportunity to experience the work. Some Board members raised the idea of supporting New England artists through expanding work in the public realm, building on NEFA's history of supporting public art programs in specific geographies (e.g., through *Fund For the Arts*, the *Creative City* initiative, the *Northern Forest* project) and extending the work in the region. With an increased number

of New England communities engaged in connecting arts with varied community endeavors, the potential interest in public art has been expanded.

**Engagement of more arts disciplines, especially visual, literary and media arts.** There is strong interest and commitment to encouraging artists working in these forms to participate in NEFA's existing programs and recognition that the current language and the traditions of NEFA's grant programs may communicate otherwise. The Board would like to see changes that would facilitate broader participation, including rethinking touring models to make distribution of work more compatible with forms beyond performing arts. Cutting across these ideas is Board commitment to Native artists. Board members want to find a way to support Native artists through existing and new grant programs.

**Support for presenter cohorts.** A consistent thread in conversations was the unique position of smaller and rural presenting organizations that may not be able to take advantage of existing opportunities. One option is incentivizing larger presenters to collaborate with smaller presenters around tours, e.g. facilitate "piggybacking" onto planned tours. Another is support to engage small presenters with existing networks, e.g., Network of Ensemble Theaters, to facilitate connections with artists and with other presenters who are planning tours. Sponsored showcase opportunities could facilitate artists-presenter and presenter-presenter connections.

**Opportunity grants.** The mechanism of short-term small scale "opportunity" grants was suggested by both artists and presenters. Many of the ideas offered in this report could be addressed through such opportunistic grants. An artist might come across a potentially catalytic professional development opportunity or be able to extend a community residency to augment development of a new work. A small presenter might be willing to take a risk on an unfamiliar artist with some grant support for audience development and/or marketing.

### ***OPTIONS FOR SUPPLEMENTING CREATIVE ECONOMY/COMMUNITY DEVELOPMENT INITIATIVES***

In November 2015 we met with staff to review the feedback from CCX participants and ideas collected over time about next steps for the collection of activities that NEFA undertakes to support creative sector development in communities. Mindful of resources and capacity, we identified the ideas listed below as most appropriate for NEFA to prioritize:

- **Research.** NEFA's long term planning for periodic updates of creative economy research, including the census survey of artists in the region, remains very important to constituents.
- **Enhancing *Creative Ground*.** As focus group participants' comments suggest, *Creative Ground* is being used by artists and presenters in the region as intended, and they see even more possibilities with enhanced functionality to support existing NEFA programs, including making

connections between community development and the work of artists and presenters. NEFA staff will need to review the various ideas suggested throughout this report and determine what is feasible within the platform. We did not set out to gather feedback on *Creative Ground* because it is a relatively new innovation which is still early in implementation but it is encouraging that the field is engaging with *Creative Ground* and offering ideas for enhancements.

- **Organizing framework.** A body of work has evolved from the early days of the creative economy work which is now better described as community revitalization involving the creative sector. NEFA can play a role in developing a framework and the terminology to describe and catalog various efforts. Such a framework could serve the functions of organizing an inventory of community profiles (see below), providing the structure for strands within CCX, and facilitating analyses of patterns of outcomes.
- **Community profiles.** As the popularity of CCX shows, there's strong interest in collections of stories of how the creative sector affects positive outcomes in communities. Desirable qualities of cases include practical "how to" details, including getting started, financing, public engagement strategies, and short and long term outcomes and methods of evaluation. Presenters who have been featured at past CCX conferences represent the starting point for a collection of such profiles.
- **NECEN experiments.** In the near future, several suggestions from CCX participants might be piloted within NECEN to test the field's interest in different approaches to sharing information. Examples that could be integrated with current programming: structured peer-to-peer visits to featured communities facilitated by NEFA staff or network volunteers; a series of interactive webinars that feature the type of presentations provided at CCX conferences targeted to particular audiences such as rural/isolated communities; in-depth skills training in select topics (e.g., use of social media for developing community support; methods for gathering community input) potentially offered within a fee-for-service model.
- **Leadership development.** Twenty years ago NEFA initiated *Building Communities through Culture* which combined leadership development for a cohort of arts and community leaders with incentives to develop community projects involving the creative sector. It would be valuable to understand the paths that leaders subsequently took within their communities and to understand the lasting effects of the project work they developed. The information would help to determine how a similar leadership development program might be shaped for current times.

## CONCLUDING THOUGHTS

This strategic planning report is completed at the time when the country celebrates major milestones in public funding of the arts. The National Endowment for the Arts has just celebrated its half-century anniversary and NEFA enters its 40th year of supporting the arts in New England. With *Creativity Connects*, the NEA has launched a national conversation about the best ways to support artists going forward into the next half-century, including identifying ways the arts connect with the other sectors of American life. NEFA's investigation of the ways to best support artists and presenting organizations is timely, and will contribute to the national conversation.

While we set out to identify potential changes to NEFA's New England programs to keep them relevant to a changing region, we learned that those programs in their current configuration play an important role for artists, presenters, and communities. But we also learned that New England's artists and presenters are facing challenges that require expanded attention to capacity development. While they look to NEFA to address at least some of those needs, we recognize that it will take additional resources and partnerships to do so. NEFA has a track record of carefully designing responses to field needs (e.g., the *Regional Dance Development Initiative*, *Building Communities through Culture*, *National Theater Project*, *Creative Communities Exchange*) that attract funders and meet field needs, providing a solid platform for designing future initiatives.

For several decades, NEFA has assumed a leadership role in building understanding of the role that the arts play in fostering community vitality, including making important contributions to the region's economy. Through the strategic planning process, we have affirmed the widespread appeal of NEFA's work in connecting arts to other sectors of community and economic development and heard many ideas about ways to complement and deepen current activities.

It will be important for NEFA's staff and Board members to develop consensus around the priorities that are best suited for a regional organization to tackle, and also to encourage the region's funders and intermediaries to take up other opportunities as suggested by the findings in this report.

## Attachment A: Description of New England Programs

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## APPENDIX A: DESCRIPTION OF NEW ENGLAND PROGRAMS

### **NEST (New England States Touring) . . . Funds presentations of New England-based performing artists from outside the presenting organization's state.**

NEST grants are awarded to nonprofit organizations (nonprofit organization, school, or government entity) through a competitive selection process to present artists from another New England state. Criteria for selection favor grantees that incorporate cross-sector collaborations and feature related activities to meaningfully engage audiences. Grants are available in amounts of up to 50% of the artists' fees, and typically range from \$400 to \$4,000. Annually NEFA awards 50-60 NEST grants to organizations in the six New England states

### **Expeditions grants . . . Provide funding for touring of high quality artists with innovative projects**

Expedition Touring grants are awarded to New England nonprofit organizations (nonprofit organizations, schools, or government entities) through a competitive selection process. Each grant must include at least three New England nonprofit organizational partners in geographically separate communities from at least two states. Each partner must include public performances and community engagement activities. Expeditions Touring grants provide up to 50% of artist fees (max. \$10,000 per partner). Criteria for selection: individual strength of each partner application; collective strength of the tour; level of artistic quality and creativity; and evidence of collaborative planning with featured artists. Competitiveness enhanced by cross-sector connections and engagement of underserved populations. Annually NEFA funds approximately 10 tours, typically comprised of 3-4 presenters. NEFA also provides two to four planning grants annually for Expeditions Touring to build interest among presenters, designed to lead to an application for Expeditions Touring support.

### **Presenter Travel Fund . . . Supports travel costs for programming and curatorial staff for research.**

Through the Fund, NEFA offers nonprofit organizations in the region a way to see artistic work at festivals, showcases and conferences so they may make decisions about work to present in their own communities. The goal is to expand the knowledge of the region's programmers and increase the diversity of artists they present. The Travel Fund supports up to 50% of total expenses, including registration fees. Grants typically range from \$500 to \$700.

### **New England Creative Communities Network (NECEN) and Exchange (CCX).... Gathers creative community catalysts throughout New England to share resources, ideas, practical information, and actionable tools that can be executed in their own communities and spotlights the efforts of NE communities.**

Every other year, NEFA hosts creative and cultural leaders from different sectors for networking and workshops led by their peers at the Creative Communities Exchange (CCX). The workshops highlight successful initiatives in the creative economy such as downtown revitalization, space development, and marketing. At each CCX, two creative economy initiatives receive a creative



## **APPENDIX A: DESCRIPTION OF NEW ENGLAND PROGRAMS**

economy award. Each CCX is co-hosted by a different New England community. NEFA also hosts the New England Creative Economy Network with periodic meetings to discuss creative economy priorities and strategies. The Network is a less formal way to create opportunities for sharing resources and spotlighting creative economy projects. NEFA spotlights creative economy initiatives on its website and through Creative Ground.

## Attachment B: NEFA Core Values

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## APPENDIX B NEFA CORE VALUES

### **NEFA Core Values: The NEFA Approach**

Below is a working list of core values that inform NEFA's work. This list speaks to aspirations as well as fully realized characteristics of current work. While any one NEFA activity might not incorporate all the core values, ideally the mix of programs and services exemplifies the set of values.

### **HOW NEFA WORKS**

**1. Connections.** NEFA staff strive to make connections of all types: artists with other artists, with arts organizations, and with communities; arts organizations with other organizations; national programs with New England artists; and so forth. Touring connects artists with audiences/new communities. NEFA recognizes that meaningful peer-to-peer connections often require facilitation and structure. NEFA seeks to carry out initiatives in conjunction with collaborators and partners.

**2. Relationship building.** NEFA staff believe in building and nurturing long-term relationships with artists, arts organizations, and communities. One implication is attention to creating new opportunities for artists/organization that have received support, building on an artist's work, extending and deepening engagements.

**3. Knowledge base.** NEFA staff have developed depth of knowledge in the fields of program emphasis. NEFA staff look for opportunities to share and apply practical craft knowledge.

### **WHAT NEFA SUPPORTS**

**4. Creative process.** When NEFA invests in the development of artists and the creation of work, staff place priority on risk-taking, interdisciplinary work, and/or innovations. Staff also understand that communities have different thresholds for what represents risk in presentation of artists. The premium on making connections means that NEFA programs frequently connect creation with touring.

**5. Live experience.** NEFA values and prioritizes live arts experiences for audiences.

**6. Reaching the underserved.** NEFA staff recognize that the definition of underserved will vary by activity and time, and that different access points are needed to serve a diversity of populations. NEFA strives to increase the diversity of artists and organizations who receive grants and services with the goal of representing the demographics and traditions found in the region. In touring, NEFA strives to serve underserved communities, i.e. those with limited access to live arts experiences.

**7. Sense of place.** NEFA staff are cognizant of how the uniqueness of place/sense of place informs many creative works. One implication is supporting art in atypical settings, encompassing a broader understanding of what is meant by an "arts presenter."

**8. Intentionality.** NEFA staff expect that grants/services should reflect clear expectations about connections to community and engagement of audiences and communities. NEFA staff favor experiences that have a clear and obvious value.

NEFA Board Report: Proposed  
Attachment C: Modifications for New England Programs

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### **Update: Proposed Modifications for NEFA's New England Programs (NEP)**

October 14, 2014

The recent NEFA Strategic Plan called for a review and update of the New England Programs with the goal of better aligning the programs with NEFA's current goals. This document includes the proposed goals for NEP modifications that will be tested with representatives from NEFA's constituencies over the next few months for: NEST (New England States Touring); Expeditions; the Creative Communities Exchange, New England Creative Network and Creative Ground; and the Creative Economy research program.

Proposed ideas for modifications have come from a variety of sources:

- staff experiences and observations (e.g., drop-off in applications from some types of presenters, requests from the field for flexibility, observations of limited participation from some locales, and reported barriers such as challenges in completing applications);
- discussions with the NEFA Board members held in July 2014; and
- systematic review of programs with the full NEFA staff during the Summer 2014.

The discussions and reviews have led to a set of goals for each of the New England programs (attached to this memo). For each program, we have further identified a set of specific modifications to meet the goals and we'll be gathering feedback from the field on those ideas through online surveys and focus groups and expert interviews. For NEST and Expeditions, we'll draw from grantees, those who have tried to become grantees, and aspiring grantees. For CCX-NECN-Creative Ground, we'll draw from those who've participated in several activities and advisory board members. We will employ a separate process for developing ideas to suggest the next generation of creative economy research activities.

Note that most of the suggested ideas can be accomplished with the current resources of the New England programs, but in a few cases, the ideas suggested would require additional funds for innovative programs (as suggested in the July Board discussion).

APPENDIX C NEFA BOARD REPORT: PROPOSED MODIFICATIONS FOR NEW ENGLAND PROGRAMS

| NEST (New England States Touring)  |  |
|--|--|
| <b>Purpose: Fund presentations of New England-based performing artists from outside the presenting organization’s state.</b>   | <b>Goals for Improving and Updating NEST</b>   |
| <p>NEST grants are awarded to nonprofit organizations (nonprofit organization, school, or government entity) through a competitive selection process to present artists from another New England state.</p> <p>Criteria for selection favor grantees that incorporate cross-sector collaborations and feature related activities to meaningfully engage audiences.</p> <p>Grants are available in amounts of up to 50% of the artists' fees, and typically range from \$400 to \$4,000.</p> <p>Annually NEFA awards 50-60 NEST grants to organizations in the six New England states.</p>                                      | <ol style="list-style-type: none"> <li>1. Create work opportunities/exposure for an <b>increasingly wide range of New England artists</b>, including artists from diverse ethnic groups and artists who represent varied art forms.</li> <li>2. Reach a <b>wide range of types of presenting organizations</b>, including non-traditional and small presenters and first-time applicants, throughout the six New England states.</li> <li>3. Market funded programs to attract <b>new audiences</b> for the presenting organizations.</li> <li>4. Connect artists and organizations funded through NEST to other <b>NEFA opportunities</b>.</li> <li>5. Increase the <b>visibility</b>/profile of the artists, organizations, and NEFA.</li> </ol> |
| Examples of Ideas to be Tested with Field  |  |
| <ul style="list-style-type: none"> <li>• Undertake outreach efforts to targeted groups of presenters.</li> <li>• Alter geographic restrictions to allow certain percentage of in-state touring.</li> <li>• Clarify guidelines with more examples to encourage diversity/breadth of applications.</li> <li>• Incentivize diversity/new applicants with set-aside funds.</li> <li>• Provide special opportunities for NEST grantees to learn about national programs.</li> <li>• Create marketing opportunities for NEST grantees.</li> <li>• Offer more direct assistance to applicants for completion of reporting.</li> </ul> |  |

APPENDIX C NEFA BOARD REPORT: PROPOSED MODIFICATIONS FOR NEW ENGLAND PROGRAMS

| Expeditions   |  |
|---|--|
| Purpose: Fund tours of high quality artists with innovative projects.   | Goals for Improving and Updating Expeditions   |
| <p>Expedition Touring grants are awarded to New England nonprofit organizations (nonprofit organizations, schools, or government entities) through a competitive selection process.</p> <p>Each grant must include at least three New England partners in geographically separate communities from at least two states. Each must include public performances and engagement activities.</p> <p>Expeditions Touring grants provide up to 50% of artist fees (maximum \$10,000 per partner).</p> <p>Selection criteria emphasize: strength of each presenter and the collective strength of the tour; level of artistic quality and creativity; collaborative planning with the featured artists. Competitiveness is enhanced by cross-sector connections and engagement of underserved populations.</p> <p>Annually NEFA funds approximately 10 tours, typically comprised of 3-4 presenters. NEFA also provides two to four planning grants annually to build interest among presenters.</p> | <ol style="list-style-type: none"> <li>1. Broaden the applicant pool of presenting organizations that organize and participate in tours, including <b>non-traditional and small presenters</b>. Provide planning and implementation assistance to first-time awardees to ensure success.</li> <li>2. Create opportunities for more diverse artists (including efforts that range in scale) to be presented through Expeditions, including special opportunities for <b>New England-based artists</b> and artists who represent varied art forms.</li> <li>3. Market funded programs to <b>attract new audiences</b> for the presenting organizations.</li> <li>4. Encourage interested presenting organizations funded through Expeditions to participate in <b>national NEFA opportunities</b>.</li> <li>5. Provide <b>assistance early on in the planning process</b> to presenter collaborations that are planning tours in order to strengthen potential for success.</li> </ol> |
| Examples of Ideas to be Tested with Field   |  |
| <ul style="list-style-type: none"> <li>• Undertake outreach efforts to variety of presenters, including non-arts/non-traditional presenters, small presenters.</li> <li>• Provide training and assistance to incentivize first time applicants.</li> <li>• Add small and/or first-time presenters after tours have been developed.</li> <li>• Create additional opportunities for New England artists through commissions, separate planning grants.</li> <li>• Expand guidelines to broaden examples and showcase non-traditional approaches.</li> <li>• Incentivize innovative partnerships in communities.</li> <li>• Arrange expert support/critique for New England artists who are interested in NEFA’s national programs.</li> <li>• Provide mentors for less experienced presenters.</li> </ul>   |  |

APPENDIX C NEFA BOARD REPORT: PROPOSED MODIFICATIONS FOR NEW ENGLAND PROGRAMS

| Creative Communities Exchange, Creative Economy Network, Creative Ground  |  |
|---|--|
| Purpose: Catalyze sharing across communities.   | Goals for Improving and Updating CCX, NECEN, Creative Ground   |
| <p>NEFA gathers creative community catalysts to share resources, ideas, practical information, and actionable tools in areas such as downtown revitalization, space development, and marketing.</p> <p>Every other year, NEFA hosts creative and cultural leaders from different sectors for networking and workshops led by their peers at the Creative Communities Exchange (CCX).</p> <p>At each CCX, two creative economy initiatives receive a creative economy award.</p> <p>NEFA also hosts periodic meetings through the New England Creative Economy Network to discuss creative economy priorities and strategies in a less formal way.</p> <p>Creative Ground is the newest effort to spotlight and connect the people and places of the New England creative economy through online profiles.</p> | <ol style="list-style-type: none"> <li>1. Increase the involvement of <b>non-arts sectors</b> in the Exchange and Network to bridge sectors.</li> <li>2. Create and leverage <b>connections with regional groups and associations</b> from outside the arts sector, e.g., regional planning commissions, regional transportation entities.</li> <li>3. Attract more <b>diverse types of communities/neighborhoods</b> (e.g., culturally specific areas, urban and rural, economically challenged communities) to participate in the CCX and NECEN activities.</li> <li>4. Highlight New England’s <b>profile nationally</b> as a vital creative economy and attract resources to the region.</li> <li>5. Increased participation by creative sector in <b>community planning and development</b>.</li> </ol> |
| Examples of Ideas to be Tested with Field   |  |
| <ul style="list-style-type: none"> <li>• Engage other funders in CCX and NECEN support as well as sponsors from other sectors.</li> <li>• Feature workshops/exchanges led by non-arts sectors.</li> <li>• Create materials featuring strategies from other sectors and revitalization strategies in underserved communities.</li> <li>• Find ways to feature/spotlight community revitalization that goes beyond economic outcomes.</li> <li>• Conduct needs assessments of communities that have not participated in CCX, NECEN.</li> <li>• Provide grants to pilot/replicate ideas from exchanges.</li> <li>• Engage communities in Idea Swap to identify potential artist partners.</li> </ul>   |  |



APPENDIX C NEFA BOARD REPORT: PROPOSED MODIFICATIONS FOR NEW ENGLAND PROGRAMS

| Creative Economy Research   |  |
|---|--|
| <b>Purpose: Provide credible information about the creative activity in New England for use in planning and advocacy.</b>   | <b>Goals for Improving and Updating Creative Economy Research</b>  |
| <p>For three decades, NEFA has commissioned and published data-driven research to inform a variety of local, statewide, and regional efforts to build New England’s creative economy.</p> <p>Over time, NEFA has produced summary reports about the economic impact of cultural nonprofits and employment in creative industries and occupations.</p> <p>NEFA makes available research models, network resources, and online tools for anyone to use to quantify and develop their own creative community.</p> <p>NEFA has been a national leader in the creative economy research movement, engaging with other researchers nationwide to develop definitions, methodology and models.</p> | <ol style="list-style-type: none"> <li>1. Participate in the <b>national dialogue</b> about documentation of the creative economy, bringing innovations to New England.</li> <li>2. Produce the creative economy information that is critical for <b>decision makers</b>, including continuity and trends for those who depend on the data.</li> <li>3. Ensure that advocates and decision makers can make <b>maximum use</b> of available data.</li> <li>4. Link creative economy data to other measures of <b>community vibrancy</b> and community <b>revitalization</b>.</li> </ol> |
| Examples of Ideas to be Tested with Field   |  |
| <ul style="list-style-type: none"> <li>• Conduct assessment of regional needs for creative economy research, including identifying new information that would be useful.</li> <li>• Develop products that demonstrate varied ways for local communities, state-level advocates and others to use creative economy data.</li> <li>• Showcase unique examples of the creative economy in play in the region targeted at different audiences, e.g. corporate relocation, efforts designed to retain young people in New England, and so forth.</li> </ul>  |  |

## Attachment D: Focus Group Participants

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APPENDIX D FOCUS GROUP PARTICIPANTS

| Location  | Artists   | Organizations   |
|---|---|---|
| <p><b>Connecticut</b><br/><b>April 29, 2015</b></p> | <p>Adele Myers and Dancers (Hamden, CT)<br/>Bohemian Quartet (South Woodstock, CT)<br/>HartBeat Ensemble (Hartford, CT)<br/>Judy Dworin Performance Project (Hartford, CT)<br/>Shakesperience Productions, Inc. (Waterbury, CT)<br/>The Seth Lepore Project (Easthampton, MA)</p> | <p>Artists Collective Inc. (Hartford, CT)<br/>Artspace New Haven (New Haven, CT)<br/>CityStage &amp; Symphony Hall (Springfield, MA)<br/>Real Art Ways (Hartford, CT)<br/>Springfield College (Springfield, MA)</p>   |
| <p><b>Massachusetts</b><br/><b>May 1, 2015</b></p>  | <p>Flamenco Dance Project (Newtonville, MA)<br/>Jean Appolon Expressions (Cambridge, MA)<br/>Liars &amp; Believers (Cambridge, MA)</p>  | <p>3S Artspace (Portsmouth, NH)<br/>Boston Asian American Film Festival (Boston, MA)<br/>Boston Book Festival (Cambridge, MA)<br/>Boston University Arts Initiative (Boston, MA)<br/>Cultural Org. of Lowell/CASE City of Lowell (Lowell, MA)<br/>FOLK New England (Cambridge, MA)<br/>Massachusetts Cultural Council (Boston, MA)<br/>Multicultural Arts Center (Cambridge, MA)</p>  |
| <p><b>New Hampshire</b><br/><b>May 6, 2015</b></p>  | <p>Absolutely Magic/Andrew Pinard (Bradford, NH)<br/>Akwaaba Ensemble (Manchester, NH)<br/>Dahlia Nayar (Northampton, MA)<br/>Jeff Warner (Portsmouth, NH)</p>  | <p>Arts Alliance of Northern New Hampshire (Littleton, NH)<br/>Capitol Center for the Arts (Concord, NH)<br/>Celebrity Series of Boston (Boston, MA)<br/>Colonial Theatre (Bethlehem, NH)<br/>Fairfield University, Quick Center for the Arts (Fairfield, CT)<br/>Franklin Opera House (Franklin, NH)<br/>International Festival of Arts &amp; Ideas (New Haven, CT)<br/>Jean's Playhouse (Lincoln, NH)<br/>Massachusetts College of Liberal Arts, Berkshire Cultural Resource Center (North Adams, MA)<br/>New Hampshire State Council on the Arts (Concord, NH)<br/>Keene State College, Redfern Arts Center (Keene, NH)<br/>St. Kieran Community Center for the Arts (Berlin, NH)<br/>The Music Hall (Portsmouth, NH)<br/>Vermont Performance Lab (Guilford, VT)<br/>Wesleyan University, Center for the Arts (Middletown, CT)<br/>Williams College, '62 Center (Williamstown, MA)<br/>The Yard (Chilmark, MA)</p> |

APPENDIX D FOCUS GROUP PARTICIPANTS

| Location   | Artists   | Organizations  |
|--|---|--|
| <p><b>Maine</b><br/><b>May 7, 2015</b></p>         | <p>Figures of Speech Theatre (Freeport, ME)<br/>Hio Ridge Dance (Denmark, ME)<br/>Ice Dance International (Kittery, ME)<br/>Michael Wingfield (Portland, ME)<br/>Sara Juli (Falmouth, ME)<br/>Terra Moto/Marty Pottenger (Portland, ME)</p>   | <p>Bay Chamber Concerts (Rockport, ME)<br/>Celebration Barn (South Paris, ME)<br/>Denmark Arts Center (Denmark, ME)<br/>Mayo Street Arts (Portland, ME)<br/>SPACE Gallery (Portland, ME)</p>   |
| <p><b>Vermont</b><br/><b>May 20, 2015</b></p>      | <p>Bryce Dance Company (Burlington, VT)<br/>Melissa Richmond (Claremont, NH)<br/>Lida Winfield (Burlington, VT)</p>   | <p>Bennington College (Bennington, VT)<br/>Chandler Center for the Arts (Randolph, VT)<br/>Court Street Arts (Haverhill, NH)<br/>Dartmouth College, Hopkins Center for the Arts (Hanover, NH)<br/>Lebanon Opera House (Lebanon, NH)<br/>Middlebury College, Mahaney Center for the Arts (Middlebury, VT)<br/>Paramount Theatre (Rutland, VT)<br/>Plymouth State University, Silver Center for the Arts (Plymouth, NH)<br/>Vermont Arts Council (Montpelier, VT)<br/>West Claremont Center for Music and the Arts (Claremont, NH)</p> |
| <p><b>Rhode Island</b><br/><b>May 21, 2015</b></p> | <p>ali kenner brodsky &amp; co. (Dartmouth, MA)<br/>Betsy Miller and Dancers (Pawtucket, RI)<br/>Dan Butterworth (Pascoag, RI)<br/>Sydney Skybetter (Providence, RI)<br/>elephant JANE dance (Wakefield, RI)<br/>Everett (Providence, RI)<br/>Fusionworks Dance Company (Lincoln, RI)<br/>New Inca Son (Jamaica Plain, MA)<br/>Pendragon (Pawtucket, RI)<br/>Puerto Rican Institute for Arts (Warwick, RI)<br/>RaceDance (New London, CT)<br/>RPM Voices of Rhode Island (Providence, RI)</p> | <p>Clouds Hill Victorian House Museum (East Greenwich, RI)<br/>College of the Holy Cross (Worcester, MA)<br/>Common Fence Music (Middletown, RI)<br/>Rhode Island College, Performing Arts Series (Providence, RI)<br/>Rhode Island State Council on the Arts (Providence, RI)<br/>The Steel Yard (Providence, RI)<br/>Tomaquag Museum (Exeter, RI)</p>  |