STRATEGIC PLAN
2018-2021

NEW ENGLAND FOUNDATION FOR THE ARTS
ABOUT NEFA

The New England Foundation for the Arts invests in artists and communities and fosters equitable access to the arts, enriching the cultural landscape in New England and the nation.

NEFA accomplishes this by granting funds to artists and cultural organizations; connecting them to networks and knowledge-building opportunities; and analyzing their economic contributions.

NEFA serves as a regional partner for the National Endowment for the Arts, New England’s state arts agencies, and private foundations. Learn more at www.nefa.org.
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Expeditions-supported BANDALOOP at Wellesley College; Kimberly Maroon
EXECUTIVE SUMMARY

We are proud to present a strategic plan for the New England Foundation for the Arts. This plan is grounded in a vision that NEFA contributes to a nation where artists flourish and communities celebrate art as essential to a thriving, equitable society. Our mission is to invest in artists and communities and foster equitable access to the arts, enriching the cultural landscape in New England and the nation.

At the core of our plan is a set of goals that maintain and advance NEFA’s historic commitment to investing in artists and the creative process; understand a commitment to equity, diversity, inclusion and accessibility as a key area for growth and impact; and seek to strengthen our core operational stability. Our new strategic plan calls for even greater commitments to:

» artists and the creative process – from the creation of new work to support for the role of artists as leaders, reinforcing their partnerships with cultural organizations in communities, and fostering their professional development

» networks and knowledge-building – including forward-thinking research projects that add value to the creative economy, inform advocacy and spotlight the strength of the creative sector, as well as investment in learning opportunities for our constituents

» equity, diversity, inclusion, and accessibility – our efforts to recognize, support and invest in equity, diversity, inclusion, and accessibility are essential to building a stronger arts sector and to all aspects of our internal operations

» value, impact, and sustainability – we seek a clearer communication of our value, and increased sustainability so that we can most effectively advance progress in the creative sector

» organizational culture and capacity – we will enhance core operational capacity, and invest in teamwork and personal development for NEFA’s people, to build an ever-more transparent, responsive organization.

We offer special thanks to Amy Zell Ellsworth, chair of NEFA’s strategic planning task force, to the entire NEFA board and staff, and to our facilitators in building this plan, Michele Walter and Lynette Turner at AMS Planning & Research, and Carmen Morgan and Lydia Garcia at artEquity. We are grateful to The Barr Foundation for their support of this process.

CATHY EDWARDS
Executive Director
New England Foundation for the Arts

LAWRENCE J. SIMPSON
Chair, Board of Directors
New England Foundation for the Arts
INTRODUCTION

In February 2017, the New England Foundation for the Arts began work on a new strategic plan. In light of the rapidly changing political and social environment for arts and culture organizations, and with new staff and board leadership in place, NEFA’s goal was to craft a three-year plan that is both comprehensive and adaptable to changing conditions. The work took place throughout 2017, which was a time of significant uncertainty in the United States. NEFA sought to articulate and affirm its unique value proposition, and position itself for a future certain to hold dramatic changes in funding, motivations underlying creative expression, technological innovation and disruptions, and a civil society where mission-based organizations will be called upon to deepen their commitment to equal opportunity and just access to resources.

The NEFA strategic plan is grounded in the conviction that arts and culture are integral to strong and equitable communities. The plan seeks to further strengthen NEFA’s historic commitment to investing in artists through grant-making with attention to structures that support holistic professional development and success for artists and creative individuals, recognizing that they are at the core of the creative ecosystem and essential to healthy and vibrant communities.
PLANNING APPROACH

NEFA engaged AMS Planning & Research to facilitate the strategic planning process. Michele Walter and Lynette Turner of AMS utilized an approach grounded in qualitative and quantitative research that informed significant board and staff engagement. Critical input from constituents came through major program evaluations and research commissioned by NEFA in the years prior to strategic planning, including significant surveys, interviews, and focus groups. AMS conducted external research into industry trends that impact NEFA’s role, opportunities, and future. AMS drew on resources from diverse public agencies, foundations, and arts service organizations, as well as a series of interviews with leaders from across the sector.

Concurrent with this strategic planning process, NEFA worked with artEquity to provide training on equity, diversity, inclusion, and accessibility with an emphasis on both analysis and skills-building. Starting with an in-depth organizational assessment, Carmen Morgan and Lydia Garcia of artEquity worked with NEFA staff to develop a common understanding of the range of equity issues facing the organization and the field. A two-day, off-site staff training by artEquity has been followed by regular workshops and a commitment to advancing equity, diversity, inclusion, and accessibility as central to NEFA’s vision of its future success and impact. As equity, diversity, inclusion, and accessibility are cornerstones of the NEFA strategic plan, NEFA will continue to develop its values, internal procedures, and external services through this lens, and will continue work and learning into the future.
WHERE WE BEGAN: NEFA TODAY

The New England Foundation for the Arts is regarded as an organization with devoted leadership, deeply invested in supporting the arts in New England and the nation. NEFA’s knowledgeable staff and robust research practice are recognized as important contributions to the field. The organization is respected for its longstanding support of touring and its over 20-year leadership of the National Dance Project, as well as its groundbreaking and ongoing quantification of the creative economy. NEFA has evolved with the field and capitalized upon its leadership position to advance programs in theater, public art, and international exchange.

Over the last three years, NEFA appointed a new Executive Director, elected 15 new board members, and made changes to the organization’s leadership and program structures. Within this institutional evolution, NEFA’s leadership team recognized the opportunity to shine a light on the organizational model and consider an evolution in both practice and service to the field across disciplines and geographies.

NEFA is acknowledged as uniquely relevant. It has a forward-thinking practice of convening varied constituencies around issues of interest to the field in New England and nationally; a long-standing commitment to artists and the creative process; a leadership role in investigating the broader creative economy; and an ever-growing effort to advance equity, diversity, inclusion, and accessibility. In addition, NEFA has a healthy balance sheet underpinned by longstanding funders.

NEFA’s challenges include an environment in which public funding for the arts is unstable, with concern that appropriations to the National Endowment for the Arts may diminish or even be eliminated within the context of federal budget priorities. State arts appropriations are also unstable in the New England region. NEFA has not historically cultivated family foundations or donor-advised funds. Individual and board giving has seen marked, if modest, growth in recent years.

NEFA is also challenged by concerns about operational capacity to advance its ever-evolving work in the context of rapid changes in how people make, experience, communicate, and evaluate creative work. In an environment of scarce resources for core operations, NEFA has less flexibility to experiment with new approaches, staff training, and technological innovations.

Lastly, NEFA has a practice of operating outside of the spotlight, and consequently would benefit from the creation of a strong public brand and value proposition for its impact and core values.
WHAT WE LEARNED

BROADENED DEFINITION OF ARTIST & ARTIST SUPPORT

First and foremost, NEFA desires to support artists and the creative process, recognizing an ever-expanding diversity of people and creative practices as essential to the vitality of the arts and culture sector in strong and equitable communities. NEFA plays an important role as a grant-maker, both in the creation of new work and in encouraging opportunities for communities to engage with artists and their work. NEFA recognizes that artists and cultural organizations rely on one another to achieve their greatest impacts, and that artists will be most successful when they can partner with strong cultural organizations. NEFA also recognizes that it can deepen its work to support artists based in New England who occupy an increasingly fragile economic position in the region.

Artists and creative people are entrepreneurial in their work, and data show that a much higher percentage of creative workers are self-employed than workers in other sectors of the economy. NEFA seeks to support these workers with access to the professional development tools they need to function as creative entrepreneurs in a changing landscape.

Artists and creative workers are increasingly taking leading roles in community vitality, and NEFA supports artists by cultivating leadership in community engagement, and acknowledging that civic dialogue and social connectivity are integral to (and a key product of) creative practice. In particular, NEFA is committed to supporting the voices of artists and communities that have been excluded from opportunity based on structural inequities.

CONNECTING WITH COMMUNITY

Communities are expansive, and NEFA works to support broad notions of value around context, place, and venue for creative production. Because communities are complex and composed of many stakeholders and participants, NEFA seeks to support varied notions of artistic success. Considering communities according not just to geography, but in the scope of shared artistic practices, environmental needs and opportunities, and other factors, including systemic underinvestment, informs NEFA's work.

NEFA recognizes that touring is a means, not an end, to connecting artists and communities across New England, the nation, and the world. Touring drives cultural exchange, offers artists opportunities to build their audiences and networks, and provides communities with direct access to diverse forms of artistic expression.

Development of diverse out-of-sector partnerships and services is happening in tandem with the growing diversity of contexts, places, and venues for arts and culture experiences. These partnerships inform the ways in which artists and cultural organizers are blurring the line between practitioner and spectator. This is evident in the performing arts with the rise of immersive and interactive performance genres, but also visible in public art, and emerging social and civic practices of art-making. NEFA has an opportunity to grow its services to an ever-evolving notion of community partners, allies, and organizations invested in culture, and to purposefully invest in embracing partnerships as a way to increase reach and impact.
SHARING KNOWLEDGE

Knowledge-sharing efforts are a key element to building a stronger creative sector. NEFA’s research into and on behalf of the arts and culture sector is a key organizational asset. Artists and leaders of cultural organizations alike seek increased access to field-wide learnings, professional development, networks, and knowledge of cultural assets.

There is clear desire in the field for more variety and nuance in professional development programming for artists, cultural organizations, and other key stakeholders. NEFA’s own training and learning related to equity, diversity, inclusion, and accessibility will inform its dissemination of knowledge and formulation of professional development strategies. In a landscape of finite resources, partnerships are a key driver of success and impact. Sharing information with organizations and individuals in the arts ecosystem is - and will become - even more important. Accumulated expertise exists in the work of artists, arts administrators, and other people who have engaged with learning opportunities, leadership forums, and grant programs.

NEFA can advance its own organizational research practice and serve the field by providing robust research, evaluation, and learning about and for the arts and culture field, with a commitment to understanding the factors that advance equitable opportunities for artists to succeed over time.

ADVOCACY, POLICY, & DATA

Research and data that inform policy and advocacy are essential to the arts and culture sector’s ability to mobilize support for its work. In addition to support for the sector overall, advocacy for the unique needs and concerns of artists and creative workers is critical. Analysis of the creative economy, including both the nonprofit sector and an expansive understanding of creative industries and their role in community vitality, is an important means of advocating for a dynamic workforce to both the public and private sector.

NEFA will strive to increasingly engage sectors other than arts and culture, in response to concerns within the organization and the field regarding silos of sector and disciplinary knowledge and recognizing the power of arts to enhance economic and civic capacity. By connecting with organizational and individual stakeholders who hail from diverse disciplinary backgrounds, NEFA has the opportunity to leverage existing program knowledge, research, and data in order to advance a values-based approach to a just, equitable social context for the arts and community vitality.

NEFA seeks to join forces with its peers to advocate for expanded public and private investment in the arts and for equitable mapping of cultural assets and distribution of resources. Using the RAO network’s distinct strengths, this cohort may tap into as-yet untested resources from public agencies, private sector foundations and corporations, and individual investors who wish to generate impact through the arts.
PUBLIC FUNDING & PRIVATE OPPORTUNITIES

The National Endowment for the Arts has been a longstanding source of support for state arts agencies and regional arts organizations. Partnership with the NEA undergirds regional program priorities and supports evolving organizational and operating needs. While NEA appropriations have been relatively stable for the five years preceding this study, volatility surrounding Federal appropriations to the NEA itself may lead to significant reduction in NEA support. NEA dollars disproportionately fund NEFA’s support services, representing 16% of NEFA’s total income from FY 2013-FY 2016.

The New England state arts agencies are important institutional stakeholders in the overall health of the arts and culture sector in the region. However, state budgets are stressed and the agencies have not seen increased investment; in fact, several have had their budgets diminished in the years since the recession. NEFA’s partnership with the SAAs has in the past enabled NEFA to expand services, test ideas, and enter into critical program and service areas. SAA directors and NEFA work closely together on issues as varied as NEFA governance, identifying strategic issues and opportunities, and best practice models. When budgets for New England’s SAAs are reduced, this has a direct impact on their ability to invest in NEFA, and accordingly, on NEFA’s ability to maintain and expand existing program services.

Donor choice is a key to multiple trends in other channels for giving. The proliferation of donor-advised funds, which have grown more than 35% in the seven years prior to this strategic plan, is one indication of this. A second is the similarly explosive growth of family foundations. At the start of the 21st century, the United States had just over 3,000 family foundations, which often gave within a designated geography. As of this writing, there are over 42,000 family foundations, and a growing minority of these align their giving with specific issues rather than places. Finally, episodic giving has seen increased growth, possibly through its connection to social media and rising public interest in social and political activism. At this point in its history, NEFA has not sought to cultivate donors from this growing sector of family foundations and donor-advised funds, but provides value that may be articulated in a manner that can lead to new relationships and investments.
WHERE WE ARE GOING: 2018-2021

Based on what we learned during the strategic planning process, NEFA revisited our vision and mission. We also created a set of values, and then defined them for ourselves and this point in time. These statements represent our guiding principles.

Building on NEFA's vision, mission, and values, we forged strategic plan goals and objectives for the 2018-2021 time frame. Each of the goals is described in some detail with affiliated objectives and strategies. NEFA staff continues to work on the plan in the form of specific tactics, timelines, and benchmarks for success, and this work will continue through March 2018.

OUR VISION

NEFA contributes to a nation where artists flourish and communities celebrate art as essential to a thriving, equitable society.

OUR MISSION

NEFA invests in artists and communities and fosters equitable access to the arts, enriching the cultural landscape in New England and the nation.

OUR VALUES

- **Artists and the creative process:** NEFA values the individual and collective contributions of artists in society, the ingenuity and imagination of the creative process, and is committed to freedom of artistic expression. NEFA believes in amplifying the voices of artists as leaders in our organization, the arts sector, and communities.

- **Equity, diversity, inclusion, and accessibility:** NEFA values an equitable, diverse, and inclusive world, which we interpret as all people having fair access to the tools and resources they need to realize creative and community endeavors. We acknowledge structural inequities that have excluded individuals and communities from opportunity based on race, gender, disability, sexual orientation, class, age, and geography, and strive to counter those inequities in our work.

- **Knowledge building and sharing:** NEFA values the importance of inquiry, information gathering, and collaborative learning that strengthens NEFA's practices and the arts and culture sector. NEFA promotes varied learning opportunities for diverse stakeholders and partners.

- **Leadership:** NEFA believes that leadership opportunities for artists and cultural workers are essential to a stronger arts sector and healthier communities; NEFA values the leadership role that we play to advance arts and culture in the region and the nation.

- **Partnership:** NEFA values the interdependence of artists, organizations, and communities as essential to a wholistic, equitable vision of community vitality and artistic success. NEFA values our own partnerships with the National Endowment for the Arts, state arts agencies, funders, advisors, and stakeholders, which enable alignment of resources and strategies that lead to greater effectiveness.

- **Public funding for the arts:** NEFA values public commitment to the arts and culture sector as vital to a just, healthy civic life and a robust democracy, and an essential leverage for private investment in the arts.
GOALS, OBJECTIVES, & STRATEGIES

Goal 1: ARTISTS & THE CREATIVE PROCESS

Invest in artists and the creative process, and strengthen the capacity of cultural organizations to effectively partner with artists

Goal 1 Objectives

• Invest in signature programs and models that deeply and systemically advance and link opportunities for artists, art-making, and communities
• Develop artist support initiatives to complement grant-making that are geared towards sustainability of artist practice and work life
• Foster learning outcomes that draw from NEFA’s program expertise and build capacity; embrace reciprocal learning between New England and national initiatives
• Strengthen the capacity of cultural organizations and communities to support diverse creative voices
• Provide New England artists, cultural organizations, and communities with increased resources to connect creatively with each other

Goal 1 Strategies

1. Incorporate NEFA’s signature best practices as core elements across programs
2. Identify new and/or enhanced program and service opportunities that reinforce NEFA’s mission, vision, and values, and align with historic and/or new funding opportunities related to artist sustainability
3. Develop program literature and evaluation models that articulate distinct program objectives
4. Strengthen visibility and connection opportunities for New England’s artists, arts organizations, and communities to grow their creative work and impact.

Goal 2: NETWORKS & KNOWLEDGE

Build and leverage networks, research, and knowledge to strengthen the arts ecosystem, and advocate for artists and creative communities as essential to a thriving society

Goal 2 Objectives

• Support learning, mentorship, and network-building for and among artists, cultural organizations, and arts advocates
• Provide information and tools for advocates to promote policies and programs that prioritize creative workers, creative enterprises, and arts-based community development
• Share learning from NEFA and knowledge partners to build capacity and long-term support for artists and arts institutions and promote an understanding of culture as vital to strong communities
Goal 2 Strategies
1. Advance NEFA’s research agenda to intentionally add value to arts research and the understanding of the creative economy
2. Integrate learning opportunities and research functions across programs
3. Identify and advance initiatives that support business skills and other professional development for artists and arts administrators/programmers/leaders
4. Create a plan for broad communication and distribution of research and field learning

Goal 3: EQUITY, DIVERSITY, INCLUSION, & ACCESSIBILITY

Recognize, support, and invest in equity, diversity, inclusion, and accessibility as essential in all aspects of internal processes and external opportunities to build a strong arts sector

Goal 3 Objectives
- Adopt a specific plan toward equity, diversity, inclusion, and accessibility in NEFA’s internal and external policies, practices, and systems
- Integrate principles of equity, diversity, inclusion, and accessibility into all NEFA’s grants, program services, and strategic initiatives
- Model a proactive culture of equity, diversity, inclusion, and accessibility within and among NEFA’s constituents and grantees

Goal 3 Strategies
1. Craft internal and external communications to state clearly NEFA’s equity, diversity, inclusion, and accessibility principles, commitments, and practices
2. Update and modify program guidelines, service models, and institutional development efforts to align with NEFA’s stated equity, diversity, inclusion, and accessibility principles
3. Continue to invest in equity, diversity, inclusion, and accessibility training and internal organizational development

Goal 4: VALUE, IMPACT, & SUSTAINABILITY

Serve as a creative partner and responsible steward to advance progress in the sector

Goal 4 Objectives
- Clarify NEFA’s unique value proposition and improve NEFA’s brand coherence, purpose, and messaging
- Engage new funding partners around NEFA’s unique value and expertise
- Encourage investment in NEFA’s internal capacity
- Engage as a thought partner with existing and potential NEFA partners who seek to advance equity, diversity, inclusion, and accessibility
Goal 4 Strategies
1. Evaluate and modify, as appropriate, NEFA's messaging and communications systems and tactics to position the organization for success
2. Develop current and potential income resources – including building upon individual giving successes - to diversify and stabilize NEFA's financial position
3. Build strategic partnerships

Goal 5: ORGANIZATIONAL CULTURE & CAPACITY

Operate with efficiency and transparency, cultivating a responsive organizational culture that values organizational success, teamwork, and personal development

Goal 5 Objectives
• Advance NEFA's internal structure and policies to achieve organizational success across programmatic, operational, and strategic lines
• Create an inclusive and supportive organizational culture that celebrates learning and prioritizes teamwork
• Support personal and professional growth opportunities contributing toward excellent service to NEFA's external constituencies and partners
• Prioritize board and staff recruitment

Goal 5 Strategies
1. Align internal resources with program goals to maximize NEFA's impact
2. Strengthen connectivity between board, staff, and other internal constituencies
3. Develop a formal process for staff professional growth
4. Evaluate organizational structure, policy, and HR practices against stated mission, goals, values, and commitment to equity, diversity, inclusion and accessibility; update as appropriate
5. Commit to transparent, inclusive, and robust financial practice
Center Stage artists Mohamed Abozekry and Karkade; by Heba Khalifa
THANK YOU

NEFA is deeply grateful to the many individuals and colleagues who contributed their expertise, ideas, and time to the creation of this plan.

The following stakeholders of the NEFA staff and board have engaged in the plan:

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• Marco Werman
• Lisa Wong
• Carrie Zaslow

*Denotes Strategic Planning Task Force member.

The following external interviews were conducted with the approval of the strategic planning task force, with the intention of capturing a broad understanding of the arts and culture sector.

• Savannah Barrett, Program Director, Art of the Rural
• Blair Benjamin, Director, Assets for Artists, MASS MoCA
• Pam Breaux, CEO, National Assembly of State Arts Agencies
• Tim Cynova, COO, Fractured Atlas
• Mario Garcia Durham, President & CEO, Association of Performing Arts Presenters
• Teresa Eyring, Executive Director, Theatre Communications Group
• Amy Fitterer, Executive Director, DanceUSA
• Cate Fox, Senior Officer for Arts & Culture, MacArthur Foundation
• David J. Fraher, President & CEO, Arts Midwest
• Ed Henry, President & CEO, Doris Duke Charitable Foundation
• Kemi Ilesanmi, Executive Director, The Laundromat Project
• Maria Rosario Jackson, Senior Advisor to the Arts & Culture Program, Kresge Foundation
• Joyce Linehan, Chief of Policy, City of Boston Mayor’s Office
• Robert Lynch, President & CEO, Americans for the Arts
• Meg Morton, Senior Vice President, Fidelity Foundation
• Caitlin Strokosch, Executive Director, National Performance Network
• Steven Tepper, Dean, Herberger Institute for Design and the Arts at Arizona State University
• Clyde Valentín, Director of Ignite/Dallas at the SMU Meadows School of the Arts
• Mariët Westermann, Executive Vice President of Programs and Research, Mellon Foundation
• E. San San Wong, Senior Program Officer, Barr Foundation
NEFA RESOURCES AND CONSTITUENT INPUT

» Center Stage annual reports (2012 & 2013)
» Creative City memoranda on launch and final gatherings (January, June, November, and December 2016)
» Creative City reports (2016)
» Creative Communities Exchange post-conference report (2015)
» The Jobs in New England’s Creative Economy and Why They Matter (June 2017)
» Lessons From the National Theater Project (July 2016)
» Moving Dance Forward: NEFA’s National Dance Project at 20 & Critical Field Trends (October 2016)
» NEFA’s New England Programs: Planning for the Future (February 2017)
» NEFA’s annual reports from 2012-2016
» NEFA Five-Year Strategic Plan (2008-2013)
» NEFA Five-Year Strategic Plan (2014-2019)

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