

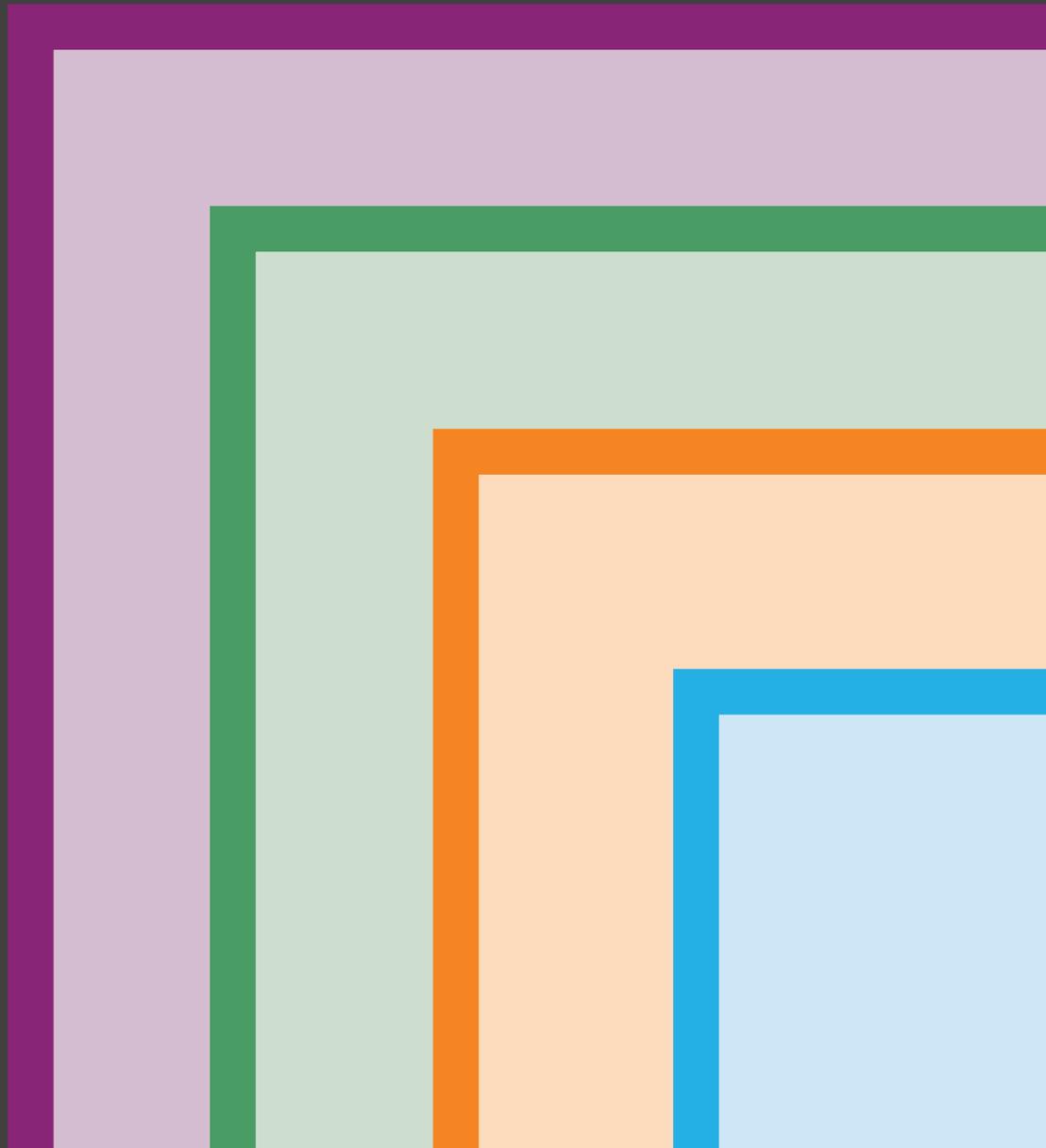


The **James Irvine**
Foundation

The Engagement Revolution

A study of strategic organizational transformation
in 10 California arts nonprofits

Prepared by Sarah Lee and Katherine Gean
Slover Linett Audience Research



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This evaluation report presents in-depth findings from an evaluation of the experience of 10 arts nonprofits participating in the New California Arts Fund (NCAF) over the course of three years. Brief vignettes throughout this report highlight the arts engagement work of these NCAF grantee-partners. More detailed NCAF participant profiles, as well as this full report, a summary of highlights, and tools used to conduct the research can be accessed at irvine.org/arts/learning.

Foreword

Across the arts field, forward-looking nonprofits and funders are exploring and testing ways to improve their relevance and sustainability in a changing world. For many, this involves a shift toward programming designed to engage more people, more actively, in how art is made and experienced.

Toward this aim, in 2013 The James Irvine Foundation and an initial cohort of 10 grantee-partners launched a multiyear initiative called the New California Arts Fund (NCAF). Where our earlier arts grantmaking included seeding experiments in programming intended to reach ethnically diverse and low-income participants, NCAF was a more robust, long-term proposition. This initiative was intended to help a group of arts nonprofits build the capacity and culture necessary to drive engagement principles to the core of their enterprises, transforming their programmatic, organizational, and business models. Through NCAF, Irvine's grantee-partners sought to make engagement of low-income and diverse Californians a central and sustainable dimension of their work.

The independent professionals at Slover Linett Audience Research have helped take stock of the strategies and lessons generated by the 10 arts nonprofits who first received NCAF grants. This report spans three years of activities and reflects evaluation findings based on the evolution and learning of the first NCAF cohort. All of these organizations progressed in their quest to embrace engagement as fundamental to their identity, and many saw significant growth in key areas of capacity — for example, most cite an elevated degree of leadership and governance support for engagement.

Irvine is pleased to publish this report to document the achievements and challenges encountered by our NCAF grantee-partners, and to share implications that may benefit other arts organizations and funders interested or invested in their own approaches to engaging new and diverse populations.



Leslie Payne
Senior Program Officer
The James Irvine Foundation

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We'd also like to thank the leadership and staff of The James Irvine Foundation, both past and present, for their vision in embedding evaluation so deeply into this initiative and for their collegueship along the way. In particular, we're grateful for the guidance and stewardship of Jason Blackwell, Stephanie Brown, Gerlie Collado, Rick Noguchi, Leslie Payne, Kevin Rafter, Josephine Ramirez, Ted Russell, and Jeanne Sakamoto throughout this work. We'd also like to thank the teams at Socius Group, Blue Garnet, Measure Creative, and Williams Group, which provided learning, implementation, and communications support to the cohort throughout — and were the best of collaborators along the way.

Finally, we thank colleagues who provided invaluable support: Peter Linett for thought partnership in making meaning out of the data we collected; Sharisse Butler and Nicole Baltazar for so ably managing Slover Linett's work in the first year of the grant; Jen Benoit-Bryan for her assistance analyzing participant data collected by Irvine's grantee-partners; Mark Tiarks for his editorial assistance; and Melissa Reeves and James Fleming for coordination and administrative support throughout.

Executive Summary

OVERVIEW

By the dawn of the 21st century, it was apparent that the nonprofit arts field was serving an audience that was disproportionately white and wealthy. When a perfect storm of factors — the “graying” of the arts audience, the population shift toward a majority-minority nation, and the 2008 recession — began to impact revenues, it became hard to argue that the arts didn’t need to worry about their relevance to a changing nation.

At the same time, an increasingly robust knowledge base was developing that showed that people of color and other underrepresented groups weren’t disinclined to participate in the arts per se — they were disinclined to participate in the formal, spectatorial ways at the heart of most traditional arts organizations’ programmatic models. In response to these developments, The James Irvine Foundation introduced a new arts strategy in 2011, predicated on the simple yet ambitious goal of promoting arts participation for all Californians. The strategy became identified with a single word: “engagement.”

That word was not new to the arts field. For some years, it had been used to convey a dizzying number and variety of notions, from serving as a synonym to “participation” or “attendance,” to indicating something about the depth and impact of an arts experience on an individual audience member, to suggesting a way of creating art that involved public participation in some form.

To support organizations that were ready to make “engagement” in all these ways a sustainable priority, the Foundation introduced the New California Arts Fund (NCAF). The animating purpose of NCAF was to enable transformational programmatic, organizational, and business model change that would sustain the reach and relevance of arts nonprofits to ethnically diverse or low-income Californians — not merely through one program, but as a commitment central to all their work.

The animating purpose of NCAF was to enable transformational programmatic, organizational, and business model change that would sustain the reach of arts nonprofits to ethnically diverse or low-income Californians.

In December 2013, the Foundation made an initial round of three-year grants totaling \$8.9 million to 10 organizations across California — a mix of museums, theater groups, multidisciplinary arts centers and presenters, and symphony orchestras. Since then, the Foundation expanded NCAF to include a second cohort of six organizations and extended another round of grants to the initial cohort of 10. NCAF-funded activities are planned to conclude over the next few years.

In this report, we synthesize the data collected during the first round of funding to the first cohort of grantee-partners through surveys, interviews, and site visits with staff at each grantee-partner organization, along with demographic data collected by each organization on its program participants. We provide a cumulative assessment of NCAF’s impact on the organizations’ internal capacity for sustaining engagement and on the demographic reach of the organizations’ engagement programming, along with an analysis of the factors that contributed to — or hindered — their progress.

The Foundation commissioned Slover Linett Audience Research to design and conduct a multi-method evaluation of the NCAF experience of the initial 10 grantee-partners during the first three years of their participation in this initiative, with a focus on answering four key questions:

1. To what extent do organizations change as a result of capacity-building activities and investments?
2. What capacity-building strategies are most effective in fostering sustainable, adaptive organizations that effectively engage ethnically diverse or low-income Californians?
3. To what extent do organizations engage ethnically diverse or low-income Californians as a result of engagement-focused programming?
4. What engagement practices are most effective for successfully engaging ethnically diverse or low-income Californians?

Engagement strategies in the NCAF portfolio

An examination of the progress and experience of 10 arts nonprofits working across multiple years to make engagement central to their organizational identity and practice, the NCAF evaluation provided an opportunity to take empirical stock of the strategies organizations used to try to reach and engage ethnically diverse or low-income communities. Whether they reimaged existing programs, invented entirely new programs in partnership with their communities, adjusted the content and process for developing programs, or incorporated new ways of experiencing traditional offerings, the organizations sought to make their programming more relevant to intended new audiences in a variety of ways.

We identified five primary strategies that organizations used to foster greater relevance:

- Focusing on culturally specific content
- Emphasizing socially or politically relevant content
- Making space for artists of color
- Experimenting with the experience or format that surrounds the content
- Incorporating community voices directly into program development

Key findings: driving engagement to the core

What distinguishes NCAF from other funding initiatives with similar goals is that, in addition to supporting programmatic activity aligned with the engagement strategies outlined above, NCAF’s primary focus was to support the kind of organizational transformation necessary to embed engagement as an institutional value and develop the structures, including fundraising, needed to sustain engagement with these communities for the long haul. The Foundation introduced the phrase, “driving engagement to the core” to describe this kind of organizational transformation and we adopt that language here. We acknowledge, however, that the concept holds up less well for those NCAF organizations that always had some form of engagement baked deeply into their programming. For these organizations, the NCAF journey was much more about building the organizational infrastructure and sustainable practices necessary to keep engagement at their core.

Four stages of development

Nevertheless, we observed many changes that are consistent with the idea of moving engagement into the core of each organization’s programming, structure, and business model. Based on those observations and for purposes of NCAF evaluation, we developed a simplified model of the four distinct stages organizations may undergo as they move engagement from the periphery to the core of their enterprise.

MAPPING STATUS AND CHANGE IN NCAF ORGANIZATIONS

STAGE 1: TESTING THE WATERS

One or more engagement-oriented programs are developed as experiments, separate from core programming

STAGE 2: BUILDING AND PROTECTING

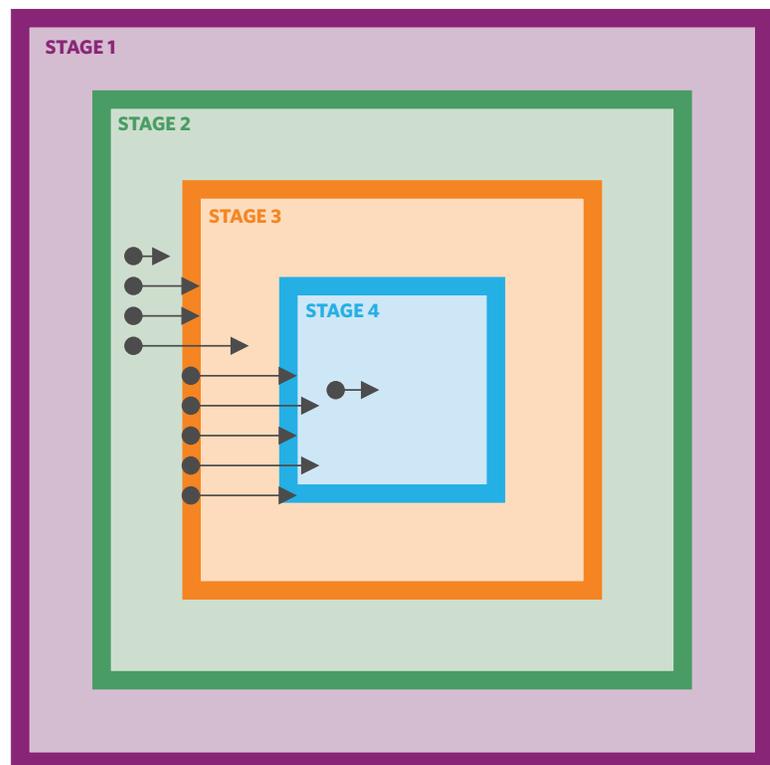
Engagement programming remains distinct but is increasingly valued and supported — though there may be some pockets of resistance to investing in it

STAGE 3: INTEGRATING ENGAGEMENT

Engagement strategies are viewed as an essential commitment; traditional programming takes on engagement properties

STAGE 4: EMBRACING ENGAGEMENT AS IDENTITY

Engagement is a central strategy, with no separation between this strategy and core programming



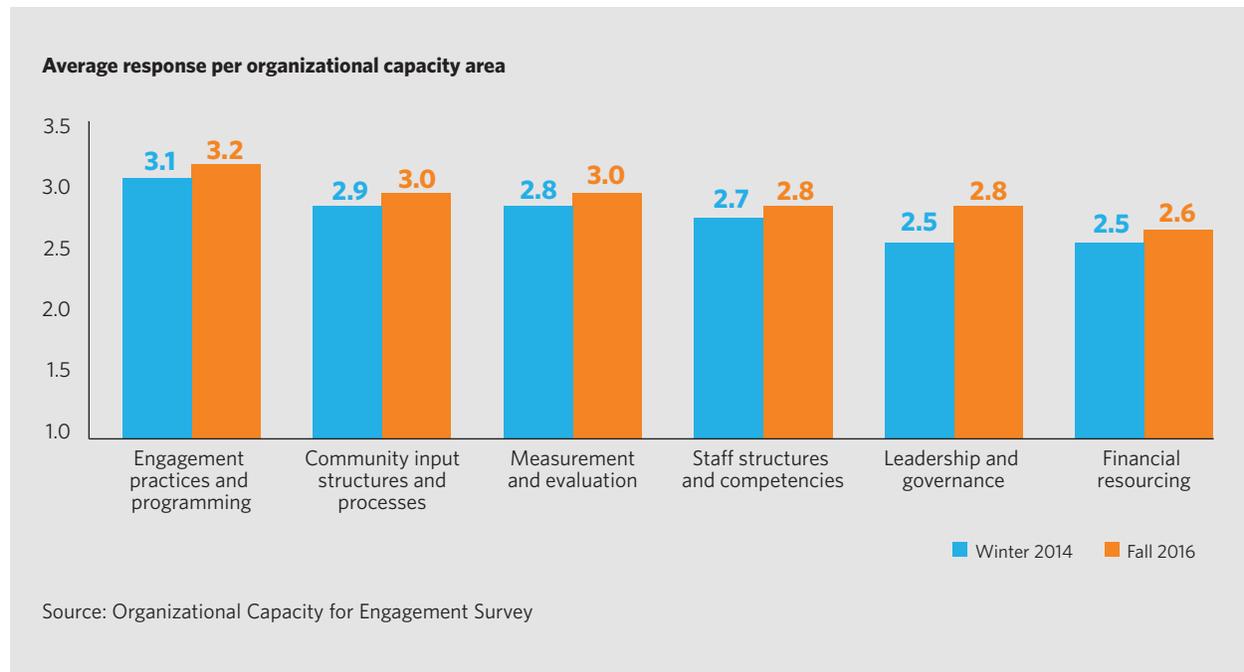
● → Starting point and movement over three years for each of the 10 arts nonprofits

The stages and grantee-partners' relative status and progress are visualized here, with further detail in both respects presented in section 3: Driving engagement to the core. From the outset, the 10 grantee-partners were distributed across the stages we defined for this evaluation. As a group, they naturally continue to exist in different stages, reflecting their respective starting points as well as long-term goals for engagement. In our estimation:

- Five organizations entered NCAF at the pivot from Stage 2 to Stage 3. All five of these organizations have laid the groundwork to move into Stage 4, slowly and steadily, in the coming years, and now lie either in the nascent days of Stage 4 or are showing promising signs of making Stage 4 sustainable.
- Four organizations entered NCAF having recently advanced from Stage 1 to Stage 2, and were exploring whether they were ready to embrace a more radical and wider spread commitment to engagement. One appears to have made the discontinuous leap to Stage 3 with respect to its programming philosophy and staff embrace of engagement, while continuing to grapple with how to align its board leadership and financial resourcing model with these changes. Two have made considerable progress in building effective engagement programs with new staffing structures and processes to support them, but are still exploring whether and how to start truly integrating their engagement-focused programming with their more traditional programming. And one has decided to remain in Stage 2, supporting some engagement programming but continuing to keep traditional programming as its core commitment.
- The final organization looked like a Stage 4 organization as it entered NCAF in many ways, embracing a deep commitment to engagement as a way of creating art from the outset — but the organization needed to shore up other capacities in order to sustainably stay in this position. While this organization has built multiple new capacities over the three-year grant period, it has additional work to do to amplify its ability to sustain high-quality engagement programming into the future.

Growing capacity

At the beginning of the grant period, we identified six broad areas of organizational capacity — engagement practices and programming; community input structures and processes; leadership and governance; staff structures and competencies; measurement, evaluation, and continuous improvement; and financial resourcing to support engagement — as being essential to the mission of driving engagement to the core. To track these shifts, grantee-partners rated their organizational capacity in 26 dimensions, grouped into six domains, both at the beginning and toward the end of the grant period. We provided a four-point scale, with each point on the scale defined by a brief, unique description of organizational capacity along that dimension, ranging from low capacity (“1”) to high capacity (“4”). Because of the relatively narrow scale used to define each dimension, we generally regard a difference of at least 0.2 points to suggest meaningful, albeit modest, growth.



In aggregate, the cohort improved in each of these broad areas over the three years of the grant period. External-facing areas of organizational capacity — engagement practices and programming, and community input structures and processes — were strong to begin with and grew modestly over the three years. But the greatest progress has been made in the area of leadership and governance. Relatively little progress was made with respect to financial resourcing to support engagement.

Critical to progress

We've observed the following practices as critical to this progress:

- Rethinking engagement:** Most grantee-partners have begun to rethink “engagement,” viewing it not as a particular program or type of program, but rather as a process of building deep relationships with community members, from which new programming is generated. Marrying community input with the artistic products that the organization develops, produces, or presents has helped many move past the persistent fears that engaging new audiences lies at cross-purposes to artistic excellence. They've also begun to redefine the nature of their expertise and authority, starting to favor a role as facilitator rather than cultural authority. They're making the creative practice and artistic production of others possible — including artists of color whose work is underrepresented in more traditional arts organizations — and finding ways for their artistic programming to exist in a dialogue with contemporary community priorities and concerns.
- Partnering with community-based organizations:** Partnership with other community-based organizations has proven to be a critical strategy for accelerating grantee-partners' efforts to engage with communities with whom they did not have established relationships from the outset. The organizations that have been most successful in deploying partnership-based engagement strategies have invested heavily in building relationships ahead of developing programs, allowing the relationships to become the substrate out of which new artistic works or programs grow. This is resource-intensive work, however, and is vulnerable when there is turnover among key staff.

- **Demonstrating leadership commitment at multiple levels:** Having leaders at both the artistic and executive levels who are deeply committed to community engagement is essential to driving this work to the core. Executive leadership commitment has helped propel engagement to the core by articulating an urgent vision for change, kicking off shifts in internal structures, and giving credibility to engagement as a shift that is intended to stick.
- **Gaining broad staff participation:** Because this transformation represents radical change in organizational culture, NCAF has substantially affected how staff work together, how they communicate, and even how new staff members are hired. Cultivating ownership for engagement among staff outside of the core engagement team hasn't been easy, but by deliberately making space for most staff to contribute to or participate in engagement programming, organizations have begun to redefine what it means to work there. On the flip side, because this work has involved substantial organizational change, most grantee-partners experienced a moderate amount of staff turnover during this period. Many departures have been seen as a natural result of organizational realignment around a new or adjusted vision, but they've also exacerbated existing capacity constraints, making it that much more difficult to move forward as quickly as leaders had hoped.

Areas for additional work

As the NCAF grantee-partners continue their work before and after the grant concludes, there are two clear areas in which additional work will need to be done:

- **Greater board commitment:** For the most part, board leadership remains less fully committed to engagement than staff. The majority of board members are committed to the values and philosophy of engagement, in principle, but have been more resistant to the actual programmatic and organizational changes that must happen to make those values manifest. Such resistance has been most notable when programming has changed in ways that have turned off a small but vocal number of subscribers, members, or individual donors, leaving board members worried about the financial implications of these changes. The board members of a couple of organizations are deeply committed to engagement programming — but are just beginning to be expected to play a strong fund development role. These organizations are growing the boards to bring in additional fundraising experience, while also strategically letting some members' terms expire.
- **More sustainable funding:** At the time of this writing, the NCAF organizations had made the least progress in developing clear strategies for sustainably funding and resourcing engagement work. This is not altogether surprising given the relatively short length of the grant. But some leaders also have been reluctant to completely transition to a new resourcing model, emphasizing the financial risks of doing so. This, in turn, has led some to exercise caution in making changes that might reduce the revenue flowing in from traditional programming, even when such changes might accelerate the shift toward engagement. Disrupting traditional programming and the traditional methods of funding it, such as subscription and membership models, is a scary prospect for many organizations and particularly for their boards. Looking ahead, many are focusing their efforts on cultivating new sources of individual giving, premised on notions of inclusivity and connection, rather than exclusivity and privilege. They hope that these new sources of funding will make them more resilient to patron drop-off as traditional programming changes more radically.

Key findings: engaging diverse Californians

One goal of this study was to assess how effectively the programs supported have “engaged” ethnically diverse or low-income communities by totaling the number of people from these demographic groups who participated in them. The complexity of engagement programming in an initiative as far-reaching as NCAF made it challenging to tell a simple, straightforward story about how participant demographics changed over time or were different across well-defined program types. We were able to aggregate demographic data relative to participation in broad types of programming: *traditional programming* (e.g., museum exhibitions, mainstage performances); *onsite event-based programming* (e.g., social events, events on the campuses of performing arts venues); and *offsite programming* (e.g., programming, often hands-on or participatory in nature, within communities or at partners’ venues). These numbers provide a directional understanding of the potential of engagement strategies to shift the demographics of who participates in nonprofit arts programming. And they show that onsite event-based programs and offsite programs engaged a considerably more diverse participant base than traditional programming, in terms of both ethnicity and income — one that was nearly as diverse as the state as a whole. The total number of people reached through these two types of programs appears to have increased by nearly 40 percent over the grant period, suggesting that organizations are channeling energy and resources into strengthening the appeal of these programs and offering even more of them.

Onsite event-based programs and offsite programs engaged a considerably more diverse participant base than traditional programming, in terms of both ethnicity and income — one that was nearly as diverse as the state as a whole.

The data also suggest that, while traditional programming audiences remain much whiter and wealthier than those who attend other forms of programming, we shouldn’t dismiss the potential for traditional programming to *become* more relevant to a more diverse audience. The numbers indicate that the proportion of nonwhite attendees at grantee-partners’ traditional programming increased by 11 percentage points. When we drill down into the data from those organizations for which we have consistent data across the grant period, we see further evidence that traditional programming can reach a more diverse audience when engagement values and practices are embedded into it and the process for creating it.

Implications

Based on these findings, we offer the following implications for individual cultural organizations that are seeking to make engagement more central to their work and for funders in the arts field. Each implication is explored more fully in the conclusion section of this report.

Implications for leaders of individual cultural organizations:

- Be honest about whether your organization is ready to fully embrace engagement as a core approach to all programming, and consider ways to explore fit before diving in head-first.
- Treat “engagement” as a strategy for creating and executing programs, rather than as a discrete program, and invest in the relationship-building and listening skills necessary to do so.
- Think deliberately about how you’ll incorporate engagement values and practices into your more traditional programming, and figure out what you’re going to stop doing.

- Reimagine program development processes and timelines to allow for community input, audience research, and/or evaluation data to substantially and meaningfully inform programs.
- Work to gain commitment to engagement from staff in all departments and at all levels.
- Bear in mind that this is organizational transformation work, and expect periods of instability and higher-than-usual staff turnover.
- Rethink how you hire new staff, and examine whether what you need from the people in certain positions matches the training that people in those fields typically get.
- Be willing to let some donors, audience members, and possibly even board members move on.
- Be patient. This work takes time and will inevitably involve missteps along the way.

Implications for funders:

- Be deliberate about whether you're supporting a specific *program* that is meant to reach a new, more diverse audience, or whether you're supporting an organization in building the *capacity* necessary to reach a new, more diverse audience beyond your investment.
- Adapt program guidelines so as to support engagement as a process, rather than engagement as a narrow but more easily definable program.
- Help organizations invest in the internal infrastructure necessary to do good engagement work.
- Reimagine the funder-grantee relationship to make space for candid conversations about the challenges of this work.
- Invest in a learning community or community of practice when funding this kind of organizational transformation process.
- Support leadership development among emerging executive and artistic leaders, particularly those of color, who are committed to this work.
- Consider collaborating with other funders to address system-wide needs in the field with respect to engagement such as persistent funding inequities, the evolution of professional standards in key functions, and the field's capacity to measure and assess the social impact of arts programming.

Introduction

The National Endowment for the Arts began tracking cultural participation patterns in the U.S. in 1982 and, for nearly two decades, the proportion of Americans who visited an art museum, saw live theater, or attended classical music concerts grew or remained steady. But around the dawn of the 21st century, those trendlines started to decline and have continued to move downward since. In 1992, 27 percent of Americans had visited an art museum in the past year; 14 percent had attended a live, non-musical theater performance; and 13 percent had attended a classical music concert. By 2012, those numbers were 21 percent, 8 percent, and 9 percent.¹ And behind those aggregate numbers lay deeper demographic discrepancies. Those who identified as white were 20 percent to 40 percent more likely to participate in traditional arts activities than were others. Participation rates for those at the upper end of income distribution were nearly four times higher than rates for those at the lower end.

This came as little surprise to most traditional arts organizations, which were used to seeing audiences that were wealthier, older, less ethnically diverse, and better educated than the populations of the cities in which they were located. As long as those audiences were buying tickets, season subscriptions, and memberships at a steady clip, many arts leaders were able to push to the back burner concerns about the demographic discrepancies between those who participated and those who didn't. They didn't dispute that these were important issues to discuss, and some investments were made, for example, in K-12 arts education programming, to help address these disparities. But as long as these disparities didn't threaten the fundamental viability of the nonprofit arts model, they weren't the primary concern of most arts leaders.

But many organizations began to find it more and more difficult to sell tickets and memberships as easily as they once had. The much-discussed "graying" of arts audiences raised questions about whether arts nonprofits could survive without radically changing their relationship to younger consumers. The broad demographic shift to a majority-minority nation forced many to reckon with the long-term prospects for organizations with largely white audiences. Declining leisure time on the part of many Americans and heightened competition for that time, especially from technology-based forms of participation, meant that arts organizations had to work harder to make a case for their value. And all of this was hastened by the 2008 economic downturn, which reduced philanthropic giving to the arts. Over the first decade of the 21st century, most arts leaders began to take more seriously the question of how to grow and expand their audience.

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That doesn't mean that all immediately began to ask the question in terms of how to reach *demographically diverse* audiences, however. In 2001, RAND released an influential study, *A New Framework for Building Participation in the Arts*,² which helped to conceptually organize the various strategies that could be used to expand participation and demand for the programming that individual organizations offered. The researchers distinguished between three different ways to increase participation — only one of which, "diversifying," involved trying to reach audiences which looked or thought differently from the audiences already buying tickets. The other methods were "broadening," or reaching more of the people who are like the people in their current audience, and "deepening," or increasing the level or frequency of involvement among current participations. They further argued that each flavor of increasing participation required a different kind of strategic intervention

on the part of the arts organization. To broaden participation, arts organizations would simply need to provide potential participants — “potential” meaning that they had a pre-existing inclination to attend the arts — with more practical information about programmatic offerings. To deepen participation, arts organizations would need to focus on making participation even more meaningful to those who were already participating with them in some form or fashion. Diversifying participation would require the most difficult intervention, challenging perceptions of the arts (such as that they were elitist or irrelevant) held by those who were disinclined to participate and introducing ways to make the arts more accessible.

Diversifying participation requires the most difficult intervention, challenging perceptions held by those disinclined to participate and making arts more accessible.

As arts funders began to focus more support on efforts to increase participation, many began to embed the RAND framework into their grantmaking guidelines. For instance, The James Irvine Foundation’s Arts Regional Initiative (ARI), which ran from 2006 to 2014, encouraged grantees to articulate a clear goal for broadening, deepening, and/or diversifying participation — but relatively few grantees opted to focus on diversifying participation,³ perhaps because it was perceived as the hardest goal to achieve, and one which would require more far-reaching changes. In our view, many arts leaders were hoping to find relatively easy fixes to the problem of declining rates of participation and the “broadening” approach, available to them through ARI and many other grantmaking initiatives, gave them tacit permission to treat declining participation as a marketing challenge. In other words, getting more information to people who were already interested in attending the formal arts was much easier than questioning whether the entire programmatic model needed to change in order to attract audiences who were skeptical of the value of traditional arts programming to their lives. So some continued to push questions about demographic disparities in participation off to another day, focusing instead on simply trying to sell as many tickets as possible to new, but familiar, audiences.

Others, however, began to turn those questions on their heads. Perhaps addressing the demographic gaps was actually the solution to the problem vexing the arts. If arts organizations could figure out how to become more relevant to those not currently participating — people of color, younger people, those at the lower end of the income distribution — they could structurally reverse declining rates of participation. These arguments were bolstered by new data sources that began to show that people of color and younger people weren’t disinclined to participate in the arts *per se* — they were disinclined to participate in the formal, spectatorial ways at the heart of most traditional arts organizations’ programs. Reaching these audiences wasn’t about convincing them the arts as a whole were worthwhile; it was about offering them opportunities to participate that synchronized with the informal, social, hands-on, creative forms of cultural participation already taking place in their lives. In other words, it would require changing programming, not just marketing the old programming in new ways.

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At the same time, many were also agitating to move the conversation about demographic inequities to the front burner because they felt that it simply couldn’t be ignored anymore. As nonprofit arts organizations, they argued, don’t we have an obligation to serve all kinds of people equally? If so, this obligation had been either ignored or relegated to education programming for far too long.

These various strands of dialogue came together in an arts strategy The James Irvine Foundation announced in 2011. The strategy was predicated on a simple, yet ambitious goal: to promote arts participation for *all* Californians. And it became identified with a single word: “engagement.” That word was not new to the arts field. For some years, it had been used to convey a dizzying number of notions, from serving as a synonym to “participation” or “attendance,” to indicating something about the depth and impact of an arts experience on an individual audience member, to suggesting a way of creating art that involved public participation in some form. In Irvine’s case, “engagement” is used to describe multiple, overlapping ideas. It is a proxy for *who* arts organizations are trying to reach with their programming. “Engagement programming” is intended to reach greater proportions of ethnically diverse or low-income communities than were traditionally reached by nonprofit arts programming — ethnicity and income being the primary demographic dimensions along which Foundation leaders felt the arts needed to change. Engagement programming is also an umbrella term for the ways that programming might need to look and feel different in order to reach those populations. In the Irvine interpretation of these words, engagement programming plays with assumptions about *how* and *where* people participate in the arts, offering more opportunities for active participation and co-creation and more opportunities to participate in unconventional, often less formal, spaces.

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NCAF participant profile



Photo credit: The Bowers Museum

The Bowers Museum

Located in Orange County, The Bowers Museum’s collection and exhibition program focuses on “celebrating world cultures” by presenting art and artifacts from around the globe. At any one time, the permanent galleries might include artifacts from pre-Columbian Meso-America, art from the Pacific Islands, or a deep-dive into the ancient arts of China. The museum has also hosted traveling exhibitions that range from the Terracotta Warriors to water

colors by Diego Rivera. For NCAF, Bowers focused on expanding its participatory Treasures Program piloted during an earlier EEF grant. Designed to reach Asian communities, and then to be expanded to Latinx communities, the program provides active, hands-on art-making classes both at the museum and at offsite partner locations. Each class pairs an art-making project that draws on a specific cultural tradition (e.g., Vietnamese painting or Guadalupe textile art) with a performance or lecture related to the project. The organization’s NCAF organizational capacity goals were focused on five primary areas: shifting its board composition by recruiting and retaining two new and existing board members and creating a new Latino Cultural Arts Council; expanding its communications strategy to include multilingual materials and staff; building partnerships with international museums in Mexico and Central and South America; shifting its exhibits to contain works relevant to the Latinx audiences the museum hoped to engage; and expanding its capacity for directly funding its engagement work with, as was later developed, a focus on generating more earned revenue.

The initial rounds of grantmaking under this new strategy fell under Irvine's Exploring Engagement Fund (EEF), a program designed to provide arts nonprofits with risk capital to experiment with new forms of programming that aligned with any of these ways of using the term "engagement": programming in non-traditional spaces; experiments in co-creation or other ways of involving audience members directly in the artistic process; or new programs targeted to communities of color or low-income Californians. Some grantees had track records of successfully executing these kinds of programs, while others were trying something completely new. Taken together, the hundreds of projects in the EEF portfolio became a powerful test-bed for exploring the potential for new forms of programming to engage low-income or ethnically diverse communities and for identifying key lessons to make individual "engagement programs" successful.⁴

But these experiments weren't designed to exist for the long haul; Irvine provided the seed money to get a program started, but it remained up to the organization to determine whether continuing the program was a priority or even a possibility. So to support organizations that were ready to do more than simply experiment with new kinds of programming — to nurture them in making "engagement" in all its various definitions an ongoing, sustainable priority — the Foundation introduced the New California Arts Fund (NCAF). The animating purpose of NCAF was to support organizations in undertaking the kind of transformational organizational and business model change that would set them up to successfully and sustainably reach low-income or diverse Californians — not merely through one program, but as a commitment central to all of their work.

About the New California Arts Fund

Selection process

The James Irvine Foundation officially launched the New California Arts Fund in 2013, as the flagship initiative of its new "arts engagement" focused funding strategy. Given an interest in supporting organizations ready to make engagement a commitment central to their work, Irvine focused on organizations that already had a track record of providing engagement programming that successfully reached communities of color or low-income communities — some of which had been supported through EEF. A few were already engaging those communities in substantial numbers, while others had a programmatic bright spot or two but weren't fully equipped to sustain and deepen their work with ethnically diverse or low-income communities.

Rather than putting out an open call for proposals, arts program staff conducted information sessions in communities across California to introduce prospective applicants to NCAF and to begin to engage individual organizations in conversation about their willingness to undertake the organizational change that NCAF was expected to entail. Eighteen arts nonprofits were invited to submit an initial concept paper to the Foundation, outlining their vision for an engagement-based programming strategy and the organizational capacity-building work that they would need to make that vision a reality. Not all organizations chose to proceed through the process, given the commitment to change that it represented. Ultimately 14 organizations elected to proceed and were given small planning grants to develop their concept papers, along with technical assistance from TCC Group to assess their current capacity to support engagement-based programming. From there, 10 organizations were invited to develop full proposals and, in December 2013, the Foundation made a total of \$8.9 million in three-

year grants to this cohort of 10. To reflect the different kind of relationship between Foundation and grantee imagined for this work, Irvine calls NCAF cohort members “grantee-partners” rather than “grantees,” and has given them considerable latitude to define the work necessary to effect the change that each organization aspires to.

The Cohort 1 portfolio

The initial cohort consists of organizations diverse in size, discipline, and geography. At the beginning of NCAF, the smallest had an annual operating budget of approximately \$500,000, and the largest group’s was roughly \$16 million. There are three museums, two theater companies, two multidisciplinary arts presenters, two multidisciplinary arts centers, and one symphony orchestra. Five organizations are based in Southern California (three in Los Angeles and two in Orange County) and five are based in Northern California (three in the Bay Area, one in Santa Cruz, and one in San Jose).

But perhaps more importantly, the portfolio reflects a variety of perspectives about what “engagement” is and about what kind of change is needed to make it a central organizational commitment. This variety was intentional on the part of the Foundation. Arts Program staff explicitly selected organizations that were starting with different strengths and weaknesses and with different destinations in mind.

Each organization is on its own journey with respect to engagement programming and the organizational change needed to support it as a central commitment. Some were quite traditional; for them, NCAF represented an opportunity to challenge those assumptions and think differently about what programming could or should look like, especially with respect to their community’s involvement in shaping it. Others had operated as traditional organizations for decades, but had already begun to take a more community-oriented, experimental approach to programming. They looked at NCAF as an opportunity to amplify their commitment to new forms of programming and to better use this new programming as a vehicle to realize demographic shifts in their audience. One organization had always used community engagement to create programming. For that grantee-partner, NCAF was an opportunity to strengthen its organizational structure and business model, enabling it to work more effectively and sustainably. The expectations for how much transformation each organization might undergo during the first three years of NCAF, and the very nature of that transformation, were pegged to where it began its journey.

Each organization is on its own journey with respect to engagement programming and the organizational change needed to support it as a central commitment.

To this end, NCAF grants support the organizations in developing and implementing “engagement programming” without providing a rigid definition of what constitutes an engagement program. So the programmatic activity within the NCAF portfolio represents a plethora of ways of understanding what “engagement” actually is. As with EEF, many programs experiment with venue (taking place offsite, at less conventional spaces) or the mechanisms by which people participate (offering them hands-on, active ways to participate). Others use “engagement” to mean something else, something that has to do with the *process* of creating programs and the ways that community members are involved in that process. Grappling with this variety has been an ongoing part of this study and, in the next section of this report, we use the activities undertaken by the portfolio to develop a working taxonomy of the engagement strategies that can be used to support a program in effectively reaching ethnically diverse

or low-income communities. The grants also have supported a wide variety of organizational capacity-building and organizational development activities, including board development, cultural competency training, evaluation and audience research, and executive coaching.

The initial round of funding for the first cohort concluded in late 2016, and the Foundation made a second and final round of three-year grants to nine organizations from the first cohort to continue the work that they began in the first round. In the meantime, the Foundation also expanded NCAF to include a second cohort of six organizations which received three-year funding in late 2015, and will be eligible to apply for a second round of grants to be made in 2018. NCAF-funded activities are planned to conclude over the next few years.

NCAF participant profile



Photo credit: California Shakespeare Theater

California Shakespeare Theater

Operating in the Bay Area for more than 40 years, the California Shakespeare Theater (Cal Shakes) presents plays written by Shakespeare and a host of other classic and contemporary playwrights (Oscar Wilde, Samuel Beckett, August Wilson, Marcus Gardley) through a four-play summer season at its home at the Bruns Amphitheater, an outdoor venue in Orinda. Cal Shakes tours performances in various communities throughout the Bay Area and has a

robust K-12 education program. During the NCAF period, Cal Shakes invested in maintaining and expanding its relationships with social service organizations and other community partners throughout the Bay Area. The theater continued a body of pre-NCAF work called the Triangle Lab, supporting artists in working with community-based nonprofits to co-create theater with and for community members. In the latter half of the grant period, Cal Shakes also worked to infuse this approach into mainstage programming — for instance, leading story circles with artists affiliated with a main stage production and members of communities served by partner organizations about topics such as gender bias, LGBTQ rights, and Islamophobia, and then threading that dialogue into performances through sound or set design and other forms of artistic interpretation. These conversations helped inform and enrich the artists' main stage work, and in one case, audio excerpts from a story circle were even incorporated into the sound design of a play. During the NCAF period, Cal Shakes focused on transitioning its organization from providing primarily curated content to providing multiple platforms to lift up “many voices and expressions.” In order to do so, Cal Shakes focused on providing cultural competency training to all staff across the organization, changing the demographic composition of the staff, and strengthening its program model through stronger relationships with artist communities to provide more participatory experiences for their audience. Cal Shakes also sought to rethink its business model and diversify its contributors in order to become less reliant on ticket sales.

The learning community

The Foundation also invested substantially in the development of a learning community designed and administered by Socius Group throughout the grant period and beyond, and designed to support the grantee-partners' learning in areas such as leadership and governance, business models, communication, change management, measurement and evaluation, and cultural competency. The grantee-partners play a critical leadership role in the learning community; a steering group comprising representatives of all organizations set the learning objectives and works with Socius Group to design activities in service of those goals.

The chief activity of the learning community has been a series of semi-annual "core group" meetings held over two to three days, in which core staff from each organization (though not always the same staff) participate. These convenings include speakers, panels, and workshops to support the group's learning goals, as well as less structured opportunities for staff to build networks and relationships with others involved in engagement work.

Other activities of the learning community include small-group learning exchanges to address topics of interest to sub-groups within the cohort. These have included opportunities to attend and discuss programming at cohort organizations, workshops on evaluation, and focused work around cultural equity and board development.

About this evaluation

In the summer of 2013, as the prospective grantee-partners were developing their concept papers, The James Irvine Foundation commissioned Slover Linett to design an evaluation plan for the New California Arts Fund. The Foundation had developed an informal theory of change for NCAF, which focused on the relationship between internal organizational change and external change with respect to who participates in programming. In short, the theory of change presumed that arts organizations would need to develop new capacities — including effectively managing large-scale change — as they concurrently made programming changes.

With this in mind, we used four key questions to guide our evaluation planning work:

1. To what extent do organizations change as a result of capacity-building activities and investments?
2. What capacity-building strategies are most effective in fostering sustainable, adaptive organizations that effectively engage ethnically diverse or low-income Californians?
3. To what extent do organizations engage ethnically diverse or low-income Californians as a result of engagement programming?
4. What engagement practices are most effective for successfully engaging ethnically diverse or low-income Californians?

We then conducted a thorough review of the grantee-partners' NCAF proposals and engaged each in a preliminary conversation to better understand their goals and their vision for what success would look like. We used those conversations to identify indicators of success that could be used to gauge progress with changes in who participates and in organizational capacity. The success indicators are summarized in a taxonomy of outcomes and strategies that can be found at irvine.org/arts/learning.

On the participant side, it was clear through our conversations with the grantee-partners that they were thinking about what it means to “successfully engage ethnically diverse or low-income Californians” in a broad and complex way — change in the participant demographic composition would be an indicator of success, but not the only one. They placed equal or greater emphasis on changes in participants’ perceptions of the organization (“Will I feel more welcome and included?” “Will I feel a greater sense of belonging?”) and on the transformative effects of participation on individuals and their communities (“Do I feel a stronger sense of my creative potential?” “Is my neighborhood changing in a positive way?”).

In other words, many grantee-partners implicitly distinguished between the hoped-for “output” of engagement programming — large numbers of ethnically diverse or low-income people attending or participating — and the intended “outcomes” of engagement, which went beyond who showed up and spoke to the essence of the experience that participants had and of the relationship between organization and participants. Many grantee-partners have incorporated these kinds of outcome

Grantee-partners placed differing emphasis on changes in participants’ perceptions of the organization and on the transformative effects of participation on individuals and their communities.

NCAF participant profile



Photo credit: Cornerstone Theater Company

Cornerstone Theater Company

Cornerstone Theater Company writes and produces new plays with and about Californians across the state. Founded with engagement as a core principle of their play-making, Cornerstone artists take root in communities throughout California, building relationships by holding story circles, attending events, and other activities. Out of these relationships, they develop new plays that tell a story of that community, often centered around an issue of deep

social resonance (immigration, gentrification). They then produce that play in this collaborative context, using a cast and crew of community members and members of their professional ensemble. Performances take place in diverse, often nontraditional venues including school auditoriums, parks, factories, and parking lots. During the NCAF period, Cornerstone focused on producing a nine-community statewide tour, which brought together communities from a decade of Summer Institute residencies and centered on themes of hunger and resource scarcity. Additionally, Cornerstone laid out multiple capacity building goals, many of which were centered around shifting and expanding its business model. The company’s primary goals were focused on developing revenue by increasing its new and repeat individual donors as well as cultivating corporate sponsors; recruiting new board members and deepening board engagement through programming; and shifting the business model to gain earned revenue through commissioned work with partner organizations. Cornerstone also developed a new mission and vision for the organization based on deep discussion and involvement with stakeholders across the organization.

measures in their own project-specific evaluation efforts, but we have not systematically gathered such data for the purpose of this evaluation. We focus primarily on the demographic composition of program participants when considering how successful NCAF has been. Nevertheless, we developed a working taxonomy of the ways in which a program can become “engaging.”

We also identified six key components of organizational capacity that were expected to be critical to the success of this work: engagement practices and programming; leadership and governance; staff structures and competencies; community input structures and processes; measurement, evaluation, and continuous improvement; and financial resourcing to support engagement. We use these six areas as a guiding framework for investigating organizational change.

Evaluation structure

With this framework in place, we developed a multi-mode evaluation plan which included data collection at regular intervals throughout the three-year grant period.

- A. Grantee-partner-administered participant surveys:** We relied on the grantee-partners themselves to collect demographic data from participants in key programs. We worked closely with each to develop appropriate survey instruments, asking each to include questions to gather income and ethnicity at a minimum. In some cases, we advised grantee-partners on opportunities to gather data about program-specific measures of success. We also advised them on protocols for administering the survey and data collection schedules. The grantee-partners reported this data to us on a semi-annual basis, starting in late 2014, for a total of five reporting waves. We received data from a total of 661 programs over the grant period; 593 included complete data about ethnicity and 441 included complete data about income.
- B. Grantee-partner survey of organizational capacity:** Using the taxonomy of outcomes and strategies as a starting point, we developed a custom survey-based tool for assessing each grantee-partner’s capacity in the six primary capacity areas. This tool was based on the Organizational Capacity Assessment Tool developed by McKinsey & Company, but tailored to reflect the specific dimensions of capacity theorized to be most relevant to providing engagement-focused programming as a core priority of the organization. The full survey tool is available at irvine.org/arts/learning. We administered this survey twice: once mid-way through the first year of the grant period and again mid-way through the third year of the grant period. We invited three to five individuals from each organization to complete the survey online in each wave; we received a total of 42 responses in the first wave and 43 responses in the second.
- C. Grantee-partner site visits:** The Slover Linett team visited each grantee-partner twice during the grant period, in the spring of 2014 and summer of 2016, with each visit lasting three to five hours. We met with a core group of staff and leadership involved in NCAF and, when possible, attended engagement-focused programming. Our conversations were guided by a semi-structured protocol covering a wide range of topics, including their hopes for NCAF, challenges anticipated, lessons learned, and expectations for continuing the work in the future.
- D. Strategy tracking interviews and in-depth interviews:** We also conducted two additional types of interviews with grantee-partner staff and leaders by telephone. The first, strategy tracking interviews, were conducted with a single staff member every six to nine months and were designed to track the evolution of their engagement practices and capacity-building strategies. In total, we conducted four

such interviews with each grantee-partner. The second type, in-depth interviews, were conducted individually with three to five staff members every nine to 12 months and were designed to gather multiple perspectives on the successes and challenges of the work as it was being implemented. In total, we conducted three rounds of in-depth interviews with a total of 51 individuals over the course of the grant period.

In addition to these data collection methods, we had informal opportunities to observe the grantee-partners and discuss their work throughout the grant period. For instance, the Slover Linett team attended all but one of the learning community core group meetings as participant-observers and to share emerging evaluation findings with the cohort. We also provided additional evaluation-oriented technical assistance to the grantee-partners at their request. For instance, we assisted some in developing requests for proposals to engage external evaluation or audience research consultants, facilitated discussions to identify evaluation goals, and provided *ad hoc* assistance in developing qualitative interview guides. And we facilitated a small-group learning exchange through the learning community to provide grantee-partners with an introduction to evaluation methods.

In this report, we focus on the initial round of three-year funding made to the first cohort of 10 organizations. We synthesize the data collected across all of these methods to provide a cumulative assessment of the impact of NCAF on the demographic reach of grantee-partners' engagement programming and on their internal capacity for sustaining engagement, along with an analysis of the factors that contributed to — or hindered — their progress.

Limitations of the data

We believe this report provides an accurate picture of the New California Arts Fund and the first cohort's experiences of it. However, as with any research study, there are limitations inherent in the data that constrain the kinds of conclusions we can confidently draw. In this evaluation, those limitations include:

- **Data about participant demographics was collected with varying degrees of rigor.** In early conversations with grantee-partners and Foundation staff, it became clear that measurement and evaluation was a critical area in which grantee-partner organizations were hoping to develop capacity. Given this goal, we determined that it would be beneficial for the grantee-partners to directly collect data from program participants. While we provided support to each organization in collecting this data, they nevertheless had varying levels of experience and resources to carry out data collection and, therefore, the quality of data collected varies across the cohort and over time. For instance, we have relatively little data on income in the first data reporting period, but much more in the final period. Further, as noted above, the definition of an "engagement program" is inherently fuzzy. Except in rare cases, we do not have data from any one program in every data collection period. In our analysis of these data, we have made effort to aggregate only across programs that are comparable to each other and, in some cases, have discarded data that we knew did not meet a minimal threshold of quality.
- **Emphasis on qualitative methods limits our ability to extrapolate and generalize.** As much as possible, we have developed our findings and recommendations based on a synthesis of all types of data collected. However, we emphasized qualitative data collection methods and some critical insights in this report are drawn exclusively from interviews and site visits. In keeping with the exploratory, semi-structured nature of those qualitative components, we have not coded or attempted

to perform statistical analyses of the responses. Instead we've analyzed the data thematically, which we have found to yield the deepest insight and understanding. The emphasis on qualitative methods in this study is very much by design. However, it's not possible using such methods to extrapolate proportionally to the full study population or to make quantitative statements about the prevalence of attitudes, perceptions, and opinions.

NCAF participant profile



Photo credit: The Ford Theatre Foundation

The Ford Theatre Foundation

Each summer, the John Anson Ford Theatres present a diverse roster of music, dance, theatre, and film events that reflect the communities that comprise the Los Angeles region. The Ford Theatre Foundation (FTF) is the nonprofit arm of this historic facility. Ford programs nurture artists, arts organizations, and audiences through initiatives designed to encourage participation in the arts, supporting its mission of bringing people together for transformative arts

experiences that inspire, empower, and ignite cultural exchange. During the nearly three years of renovations at the Ford Theatres venue, FTF engagement efforts centered on offsite JAM Session programming. A free interactive series, JAM Sessions encourage people of all ages to explore different music and dance styles under the guidance of professional artists. Over the past five years, FTF staff members have built relationships with several communities throughout greater Los Angeles, focusing on areas where access to the arts is less abundant. In each of these communities, FTF staff partnered with a community or municipal organization, sharing the FTF engagement model and providing support designed to build capacity. Through these partnerships, the FTF has successfully expanded access to these free arts engagement events. With an eye toward applying engagement principles to the core of the organization, Ford staff received training in cultural competency, created a set of organizational values, changed evaluation practices, and approached the curation of the season with a new lens. Additionally, the organization developed goals around board development with a specific focus on cultural equity and cultivating stronger relationships between the board and staff.

What is “engagement?”

The word “engagement” as used in the arts field lacks a universally held definition. For some, “engagement” is “participation” or “attendance” — a count of the total number of people reached by some program. But “engagement” is also used to connote something about the nature of the experience that a program participant has, or about the attributes of programming that support a certain kind of experience. So even as NCAF has avoided prescribing what an “engagement program” looked like, the NCAF portfolio is an opportunity to take empirical stock of the strategies used to try to reach ethnically diverse or low-income communities, and why they were used.

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In this section, we first take a step back and look at why these organizations believed that engagement represented a critical part of their organizational futures. We then look at the set of strategies used throughout NCAF to make programs more “engaging.” We hope to reveal not a new definition of engagement, per se, but a new way of understanding the variety of perspectives that are being brought to bear on what engagement is and the variety of approaches used to go about achieving it.

Why engage?

We discerned five distinct and often overlapping reasons for committing to engagement-focused programming as an institutional priority:

- **Because it’s essential for financial sustainability:** For some organizations, long-term sustainability was at the root of their commitment to engagement. These organizations felt a mandate to make themselves more financially sustainable and recognized that they needed to become more relevant to those who weren’t well represented in their current audience base in order to survive. Engagement programming represented a sort of amped-up version of the “diversifying” strategies discussed in RAND’s *Framework* — a way to bring these new audiences into their family. These organizations typically focused on engagement as an output, aiming to reach more new audience members, without necessarily committing to programming that is experientially different from what they’ve traditionally provided. In fact, they often felt an impulse to preserve as much about their traditional programming as possible, so as not to alienate their traditional audiences. As a result, they had an ambivalent relationship to change. While acknowledging that becoming more sustainable would likely require change, they were nevertheless cautious about jettisoning practices and programs that had worked well for them in the past — sometimes more so when they’d seen cautionary examples of other institutions changing and finding themselves further behind. One said, “Others have tried changing what they do in order to engage [new participants], and lost audience.”
- **Because it will keep the arts up to date:** For other organizations, the desire to shake up the notion of what an arts program, performance, or event looks like was an important factor in their commitment to engagement programming — a take on engagement that’s mostly about the attributes of the program itself. Staff at these organizations — often hailing from a younger generation than many arts leaders — recognized that people want to consume art differently in the 21st century than they did

in the 20th century. Active participation, informality, shared authority, and co-creation were necessary programmatic attributes for achieving relevance to today's cultural audiences, irrespective of their ethnicity or income level. In other words, the desire to offer a different kind of programming was more acute than the desire to reach a demographically distinct audience, even as reaching new audiences was considered a positive byproduct of new programmatic forms. These organizations often created dedicated programs in which to experiment with these attributes, and sought to infuse these attributes into their traditional programming as well ("We're reinventing how people experience art here," one told us). Because they saw this ethos as being critical to maintaining the cultural relevance of nonprofit arts, they felt less compelled to "silo" this kind of experimentation within a particular kind of program.

For some organizations, active participation, informality, shared authority, and co-creation were necessary programmatic attributes for achieving relevance to today's cultural audiences.

- **Because it's more inclusive:** Some organizations had an established or newly emerging commitment to equity and inclusion as institutional values and were concerned that their audiences didn't reflect the communities of which they were a part. They worried that their programming privileged a Eurocentric notion of the arts and might feel inhospitable to many communities, or they worried that their spaces unintentionally excluded some community members. They viewed engagement as an approach to programming that involved more actively welcoming the communities that they'd historically alienated — communities that had a long history of being systematically excluded from many areas of institutional society, including the formal arts. In the fullest expression of this impulse, they would hand power and cultural authority over to the community. For these organizations, engagement represents a complex interplay between who shows up and how they're invited to participate once there.
- **Because that's how we can matter more:** For others, the animating force behind engagement programming was the central purpose that they saw their organizations playing in society. These organizations often perceived, or were beginning to perceive, social justice and other social change aims as their reason for being. They wanted their programming to more effectively speak to those topics and give voice to the people and communities affected by pressing social issues — not only by including and handing cultural authority over to them (as above), but also by actively supporting them in making social change. As one said, "What does it look like to really place social justice at the core? It's not just about people coming to us and being welcomed. Now we're seeing ourselves as being a catalyst to the community, writ large." They didn't merely want more and more diverse people to engage with them (though they also believed that they could never fully meet their social change goals by only reaching a white, wealthy audience). They wanted to be a vehicle for broad civic engagement through their programming.
- **Because engagement leads to better art:** Finally, some organizations, especially those that had long been incorporating intense community participation into developing their work, saw engagement as a necessary ingredient in creating high-quality art. For them, engagement is a process of understanding their communities, their values, and the challenges they face. This process was a central part of how they created new work, and they couldn't imagine creating art in a way that was divorced from community. For these organizations, NCAF was less about shifting from one kind of programming to another. Rather, they focused on building the structures and capacity necessary to keep engaging their communities in an effective and sustainable way.

What kinds of programs are engaging?

Befitting this range of motivations for undertaking a commitment to engagement and the definitions of “engagement” that each implies, the first round of NCAF grants supported an enormously varied set of programs. Almost all organizations reimagined existing programs — either investing new resources and energy in order to strengthen the engagement components of a program, or expanding a program that already embodied an engagement ethos. In other cases, they invented new programs, often borne out of new partnerships or new relationships with the communities they hoped to reach. Or they took their traditional programming — such as special exhibitions in museums or performances on their venue’s mainstage — and incorporated new ways of experiencing them or new community-centered ways of creating them. Most organizations did some combination of all of these things, adjusting many different programs in many different ways, while also staying open to entirely new programmatic containers in which to build relationships with community members.

In fact, unlike other funding initiatives (Irvine’s Exploring Engagement Fund included), which support a specific program, it’s sometimes difficult to point to exactly which programs at any one institution were NCAF supported. The line between an “engagement program” and another kind of program is necessarily blurry (a point which we’ll return to below in discussion of the demographic data collected from program participants). What unites these programs, though, is that all 10 organizations were attempting to adjust the content and format of programming, as well as the process for developing it, in order to provide programming that would be more relevant to the communities they hoped to engage.

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Relevance strategies

We identified five primary strategies that organizations used to foster greater relevance:

- **Focusing on culturally specific content:** Many grantee-partners have adjusted the content of their programming in order to achieve greater relevance, modifying program selection and planning processes in ways that include more diverse perspectives. One primary content-focused strategy has been to highlight art works, stories, or artistic styles that represent the cultural heritage of a particular community, such as creating event-based programming around a traditional cultural celebration or developing exhibitions that feature art works and cultural artifacts from a particular region of the world. Such programming often succeeds in engaging members of the targeted community or cultural group, but many in the cohort pointed to the importance of authentically incorporating the targeted community into the program development process to avoid treating ethnic identity in a reductive or culturally appropriative way. Reflecting on strategies used elsewhere in the arts one cohort participant said, “We hear a lot that ‘we’re trying to reach the Latino community, so we brought in a mariachi performer.’ But is that really what that audience wants? Is that what they care about?”
- **Focusing on socially or politically relevant content:** Another content-focused strategy deployed by grantee-partners was to focus on topics or themes that have social or political currency to low-income, immigrant, or ethnically diverse communities. For instance, some grantees have mounted

exhibitions or programmed performances that directly address issues of social justice, economic opportunity, or political disenfranchisement. While such issues are certainly not the unique domain of any one ethnicity or income group, they are assumed to be more connected to the daily lives of the people that the grantee-partners are trying to engage than subject matter that is entirely divorced from social change. And, of course, for those organizations that see engagement as a way for the organization itself to contribute to social change, this content connects very naturally to the mission.

- **Making space for artists of color:** A third strategy that results in adjustments to the content programmed, and that is deployed in tandem with either of the strategies above, is to actively include more artists of color in programming. Grantee-partners have been deliberate about presenting work by visual artists, playwrights, or composers of color; hiring diverse actors, musicians, dancers, and other performers; and partnering with teaching artists whose practices are grounded in many different cultural backgrounds. Often the work that emerges from diverse perspectives reflects specific cultural traditions or tackles social and political issues in ways that white artists might not. And sometimes the content is changed in ways that can't be easily categorized, but which better reflect the multiplicity of life experiences and backgrounds that people have, rather than drawing on the largely white experience that has typically dominated Western culture. Successfully implementing this strategy often requires organization staff to be aware of the limits of their own artistic or curatorial authority: "We're conscious of not misrepresenting a voice that's not ours, and knowing the limits of our own authenticity," said one artistic leader.
- **Experimenting with the experience or format that surrounds the content:** The three strategies above are all about adjusting *what* kind of art is presented or displayed; all organizations also experimented with *how* that work is presented. NCAF programming has often involved dropping the assumption that art should be experienced as a spectator (itself a relatively modern and Eurocentric assumption), and instead providing opportunities for participants to do — to sing, dance, play an instrument, paint, etc., often alongside or under the guidance of professional artists. In some cases, NCAF programming has been presented in ways designed to make it more fun to participate in, especially for younger audiences or family groups. Work is presented in less formal settings, which may include food, drink, and social opportunities.
- **Incorporating community voices directly into program development:** Finally, some organizations have sought to make programming directly relevant to target communities by inviting those communities to co-create or otherwise contribute to the development of new work. In some cases, the artistic process is embedded in the community, intertwined with the process of engaging community members in dialogue about their lives and, sometimes, the social or political issues that are meaningful to them. In other words, this strategy may naturally lead to artistic content that is socially or politically conscious — but those themes emerge authentically from the community itself.

Most grantee-partners implicitly acknowledged that changing up the content, form, or process for creating programming — as necessary and consequential as it is — might not be enough to actually reach new audiences. So in addition to making programming more relevant, most organizations also worked to actively remove practical barriers to participation, while also offering community members an active, affirmative invitation to participate. Location has been a critical strategy here, with organizations changing up where they program not just to become more physically accessible to new communities (though that's certainly an important

Most organizations worked to actively remove practical barriers to participation, while also offering community members an active, affirmative invitation to participate.

part of programming in new locations), but also to signal the seriousness with which they're investing in a new relationship with the community. The other key strategy that organizations have used to actively welcome in new communities is to be very attentive to the languages in which programming is offered. All of the museums in the cohort have taken steps to introduce English-Spanish signage and labeling in their gallery spaces. And the performing arts organizations that work closely with teaching artists to administer programming are prioritizing multilingual skills when hiring for those positions.

There are ways for these attempts to go wrong, and some leaders worried that offsite programming, in particular, could smack of colonialism if done inauthentically or in a top-down way — envisioning a traditionally white organization bringing its cultural authority to a community that didn't ask for it and might not want it. One leader said, "We really needed to have a discussion about our role in offsite programming: Are we the host or the guest? We were acting like the host, but were we really taking into consideration the needs of the guests?" Others raised concerns about whether concentrating engagement-focused programming in offsite locations risked a kind of audience segregation, which could undermine goals of the organization to bring different people together through art: "We're still figuring out the offsite strategy because we don't want to be the kind of organization that serves a white audience onsite and other audiences offsite," one said.

"We're still figuring out the offsite strategy because we don't want to be the kind of organization that serves a white audience onsite and other audiences offsite."
— NCAF Grantee-Partner

With such concerns in mind, several acknowledged that they had become more comfortable over time with the idea that offsite programming was intended to build relationships that would eventually expand to include onsite participation too. They were still eager, however, to move beyond old assumptions about offsite programming serving as a "gateway" through which to introduce new audiences to their traditional programming. Even as organizations became more comfortable with wanting new communities to come to them, they still emphasized the importance of changing the programming itself — through at least some of the strategies outlined above — in order to be relevant to the communities with whom they were building relationships offsite.

Driving engagement to the core

To what extent do organizations change as a result of capacity-building activities and investments?

What capacity-building strategies are most effective in fostering sustainable, adaptive organizations that effectively engage ethnically diverse or low-income Californians?

We start this section by developing a brief model of the arc of change that a traditional arts organization undergoes to become one that embraces engagement as its core identity, and explore the change management dynamics that the NCAF grantee-partners experienced as they embarked on that journey. We then look closely at each of the six key components of organizational capacity that we consider to be most important to sustaining this work — engagement practices and programming; leadership and governance; staff structures and competencies; community input structures and processes; measurement, evaluation and continuous improvement; and financial resourcing to support engagement — and the changes that occurred in each across the cohort.

The long arc of change

Unlike the Exploring Engagement Fund and other funding initiatives in the field that support specific programmatic interventions designed to reach and engage new audiences, the New California Arts Fund was designed to do more than support specific engagement programs. The broader purpose was to help organizations — particularly those that had already made some institutional commitment to engagement-oriented programming — drive engagement to the core of all that they do. Implicit in Irvine’s notion of “driving engagement to the core” is the idea of an arts organization undergoing a transformation that takes engagement programming from the periphery and moves it to a position of prominence within the organization’s value system, culture, and business model. That concept holds up less well for some NCAF organizations (including some of those in the Foundation’s second funding cohort) who had always or long had some form of engagement baked deeply into their programming. For these organizations, a commitment to engagement and the institutional values to support it were already firmly in place, so the NCAF journey was less about driving engagement, as a philosophy or culture, to the core, and much more about building the organizational infrastructure and sustainable practices necessary to keep it there.

Nevertheless, across all of the Cohort 1 NCAF organizations, we’ve observed many changes that are consistent with the idea of moving engagement into the core of the organization’s programming, structure, and business model. Based on those observations, we’ve developed a simplified model of four stages of development that an organization may go through in taking engagement from the periphery to the core. From the outset, the NCAF grantee-partners were distributed across these stages and, though almost all moved from at least one stage to the next during the past three years, they naturally continue to exist in different stages, based in part on their own long-term goals for engagement. And organizations don’t appear to move through these stages with all of their components moving lockstep. For instance, staff and executive leadership might be in Stage 3 as we have defined it, while the board is still in Stage 2; or the approach to engagement might be in Stage 4, while the mechanism for funding engagement is still in Stage 3.

Here we illustrate these stages with a graphic representation that also plots progress for each of the 10 arts nonprofits involved in this study. Then we discuss each stage in depth and the changes that we've observed among this cohort of organizations.

MAPPING STATUS AND CHANGE IN NCAF ORGANIZATIONS

STAGE 1: TESTING THE WATERS

One or more engagement-oriented programs are developed as experiments, separate from core programming

STAGE 2: BUILDING AND PROTECTING

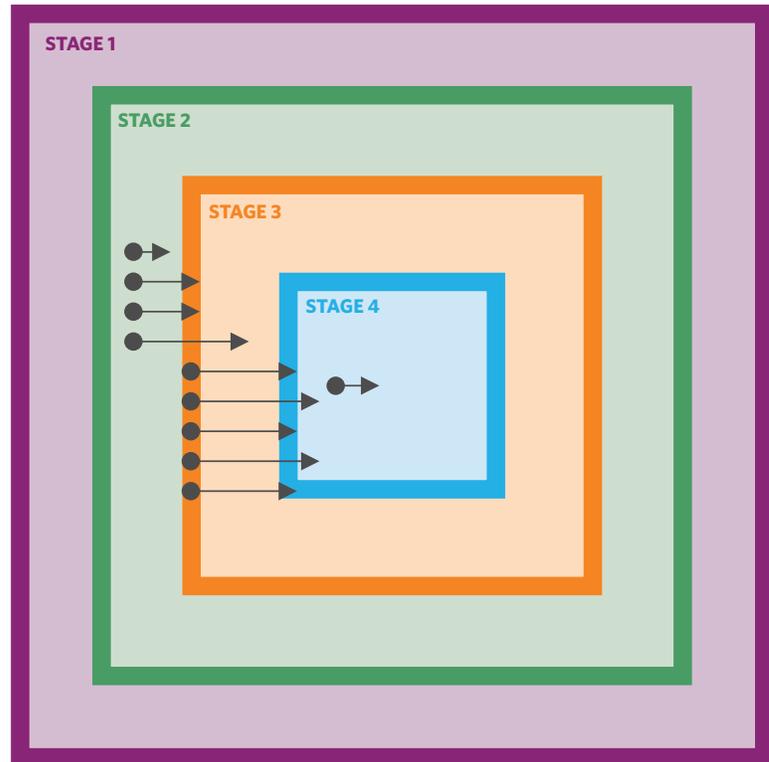
Engagement programming remains distinct but is increasingly valued and supported — though there may be some pockets of resistance to investing in it

STAGE 3: INTEGRATING ENGAGEMENT

Engagement strategies are viewed as an essential commitment; traditional programming takes on engagement properties

STAGE 4: EMBRACING ENGAGEMENT AS IDENTITY

Engagement is a central strategy, with no separation between this strategy and core programming



● → Starting point and movement over three years for each of the 10 arts nonprofits

Stage 1: Testing the Waters

A traditional arts organization begins to experiment with one or two new programs, which include participatory, interactive, and/or social elements; these programs are separated from the organization's traditional or core programming, either taking place offsite or outside regular operating hours, and core programming is not expected to change. The new programs are typically seen as a way to attract an audience that is underrepresented in the organization's traditional programming, often with the hope that these programs will create a bridge for these audiences to begin attending traditional programming.

These programs are typically funded through program-specific contributed revenue; in fact, the program may have been conceived in order to respond to a specific funding opportunity offered by an existing or prospective funder. The default assumption is that the program will continue only as long as there is a designated funding source for it.

New programs are typically seen as a way to attract an audience that is underrepresented in the organization's traditional programming, often with the hope that these programs will create a bridge for these audiences to begin attending traditional programming.

These programs are staffed by one or two individuals, typically at a junior or middle level, whose primary job function is something broader than designing and implementing these programs — often in an education or marketing department. These staff members may feel overwhelmed by these additional responsibilities, and find it difficult to give the programs as much attention as they would like to be able to. The organization’s executive leadership and board have a hands-off relationship to this programming. Their familiarity with it may be limited to their knowledge of the grant or grants that are supporting it, or they may see it as a selling point to other potential funders.

While the programs themselves may include participatory elements, they’re likely developed with little to no input from the community or communities that they’re intended for. Depending on the funding available, however, the organization may invest in activities designed to help promote the program to the target audience, including market research, partner outreach, and targeted media/ social media campaigns. Any formal evaluation of the program is likely limited to evaluation mandated by the funder; there are few channels for evaluation insight to be incorporated into ongoing program refinement and virtually no opportunities for those insights to inform programming in other areas.

Stage 2: Building and Protecting

Having successfully experimented with a few engagement-oriented programs, the organization begins to view such programming as an institutional commitment. These programs still remain separate from the organization’s traditional programming, but there’s a relatively widespread belief that the programs are important for the organization to invest in. These programs are still seen as a way to serve a community that is underrepresented in the organization’s traditional programming, but with less expectation that program participants will cross over into traditional programming. The organization is committed to serving this community and recognizes that traditional programming may not meet its needs and expectations. At the same time, engagement programming may be seen as a way to offer traditional audiences a new way to engage with the organization’s work. Engagement-oriented programs are likely still funded primarily through program-specific contributed revenue, but the organization begins to seek out new sources of funding to replace funders that drop out or to expand the program, as long as seeking out such funding doesn’t compete with other fundraising efforts. Nevertheless, programs remain vulnerable to being scaled back or eliminated if funding can’t be secured.

The organization begins to adjust the job descriptions of those staff members who are most closely involved in the programs, giving them more time and space to dedicate to the programs. Their titles might change to include a word such as “engagement,” “experience,” or “community” and, in some cases, the organization may develop an engagement-focused team, task force, or department to manage the program.

With more capacity to focus on this kind of programming, staff members begin to build partnerships and community relationships that encompass more than outreach, giving them the opportunity to refine programming in response to community needs or to develop new programmatic vehicles with the targeted community. If funding is available, they may begin to invest in more robust evaluation practice, but there may be few mechanisms for them to share evaluation insight with others outside of the engagement team or department.

With more capacity to focus on engagement programming, staff members begin to build partnerships and community relationships that encompass more than outreach, giving them the opportunity to refine programming in response to and with the targeted community.

Executive leadership and the board become sufficiently familiar with engagement programming to approve staffing changes to support it, but may remain largely uninvolved with most strategic and tactical decisions about it. Nevertheless, the organization may begin to recruit one or two board members who “represent” the community that it’s trying to engage through this programming, perhaps developing a community engagement sub-committee of the board. At the same time, engagement staff may see their distance from leadership and the board as a good thing, giving them freedom to build and deepen the programming in a way that’s protected from executive scrutiny.

As these changes occur and as others in the organization become more aware of engagement programming, there may be pockets of resistance to it among other staff, grounded in concerns that engagement programming will undermine the organization’s commitment to artistic excellence, will siphon resources from core programming, or simply isn’t “what we do.” Traditional programming staff may seek to protect their programs from the participatory, interactive, or social impulses of engagement programming.

NCAF participant profile



Photo credit: MACLA/Movimiento de Arte y Cultura Latino Americana

Movimiento de Arte y Cultura Latino Americana (MACLA)

Since 1989, San Jose has been home to this contemporary arts center, which focuses on artists from California’s Chicanx and Latinx communities. Programming includes visual arts exhibitions, performance and literary arts, and a youth digital media lab. MACLA’s engagement work has focused on infusing opportunities for active participation into exhibition programming and the performance series. The organization supports its artists in

making participation possible, helping them to move beyond the standard passive performance experience or to include opportunities for gallery visitors to add their own interpretation to an exhibition and express their point of view. Much of this work has centered around the organization’s South First Friday programming (a monthly art walk in San Jose’s SoFA district, which extends beyond MACLA). MACLA created its organizational capacity goals around board and staff development and the creation of additional programming. Staff training was intended to include a range of supports, such as classes on technical skills, volunteering in the community, and team-building activities, and increasing knowledge and practice in evaluation and measurement skills. Furthermore, MACLA intended to augment its marketing and communications with a specific emphasis on digital messaging and presence.

Stage 3: Integrating Engagement

While the shift from Stage 1 to Stage 2 may happen incrementally and organically as the organization builds engagement-oriented programming, the shift to Stage 3 is often more deliberate and disruptive. It may be catalyzed by turnover in executive or artistic leadership, with the new leader bringing an even deeper commitment to the engagement-focused work that the organization has been doing or a special personal vision for community engagement. Or, existing leadership may undertake a process to refresh the organization's mission, vision, and values and give engagement staff a lead role in that work. Or, an organization may come to see Stage 2 as unsustainable, finding it to be too resource-intensive to offer both traditional programming and engagement programming in a robust way; unwilling to sacrifice its commitment to engagement principles and to the community relationships that have been developed, the organization seeks to integrate these dual programmatic threads.

Regardless of the factor or set of factors that spur a shift to Stage 3, organizations in this stage begin to blur the lines between their engagement programming and their traditional programming. They begin to incorporate engagement-oriented strategies into traditional programming. Engagement strategies are seen as essential to being relevant to low-income, ethnically diverse, or other communities that were less represented in their audience for traditional programming — and these communities are now seen as vital constituencies to the organization.

Engagement strategies are seen as essential to achieving relevance to communities less represented in traditional programming — communities now seen as vital constituencies.

Staff roles and responsibilities begin to shift, even beyond the core engagement staff, to find ways for more people to contribute to and participate in engagement work, and full staff meetings begin to feature engagement work much more prominently. The leader of the engagement department may be promoted to an executive-level position. Staff who had been resistant to engagement or who continue to see engagement as a threat to artistic excellence may naturally move on, making space for new hires who have past experience with engagement programming, community organizing, cultural equity, or other relevant areas of expertise. Remaining staff may receive professional development training in these areas, particularly in cultural competency. Executive leadership actively manages the board's relationship to engagement programming, seeking to build buy-in among current board members, identify opportunities to strategically rotate uncommitted board members off, and to bring on new board members who are deeply committed to the work. Over time, the board grows more diverse, with new board members recruited for their perspectives on a variety of dimensions, and not merely as representatives of a particular community.

As the organization moves beyond having dedicated, easily identifiable engagement programming, it begins to consider alternative approaches to funding this work, beyond a dedicated, program-specific funding stream. It may invest new energy in building an individual giving program, seeking out new donors whose values align with engagement while also trying to retain donors who had supported the organization's traditional work — though some of those donors may eventually stop supporting the organization if new approaches to programming aren't to their taste. (This turnover is analogous to turnover at the staff level, as some leave to work for organizations that privilege more traditional arts programming.) The organization may also grapple with questions about earned revenue, and how to make traditional museum membership or performing arts subscription models work in an engagement-focused organization.

Stage 4: Embracing Engagement as Identity

Once the organization has fully integrated engagement-focused programming and more traditional programming, it no longer sees any separation between its core programming and engagement. It embraces engagement as a central strategy for all of its programming, rather than seeing it as a particular type of program. It likely also embraces a commitment to equity, diversity, and inclusion at a deep level and may reimagine itself as a dual arts/social change organization. It's not obvious to us that a commitment to social change *has* to go hand in hand with this kind of wholesale embrace of engagement. But the commitment to social change may be what gives organizations the drive and courage to undertake such major organizational change. Much, if not all, of the organization's programming is grounded in deep relationships with community members, with robust opportunities for community members and partner organizations to influence the content and format of programming.

Once the organization has fully integrated engagement-focused programming and more traditional programming, it no longer sees any separation between its core programming and engagement.

Most staff members have responsibilities that support engagement work, and those who are most closely involved with programming and with maintaining community relationships may embrace a dual professional identity: arts professionals *and* community or social change agents. Executive leadership is committed to engagement in a full-throated way, representing the organization's commitment externally, as well as championing it internally. The majority of board members are deeply committed to engagement work, including fundraising to support the work. The board is diverse with respect to gender, ethnicity, profession, and experience.

The organization has identified reliable, repeatable sources of revenue to cover the core operating expenses of programming, including the costs associated with building, maintaining, and deepening community relationships. It also has access to funds to invest in developing new programmatic vehicles for engaging the community or to expanding existing programming.

Change during NCAF

The NCAF organizations didn't all enter the initiative at the same stage and, after the first three years of NCAF, the 10 organizations continue to be distributed along this cycle of change, as we would naturally expect them to be, given their different starting points. In our estimation, four of the organizations had progressed from Stage 1 to Stage 2 in the few years leading up to NCAF, and the grant period was an opportunity to consider whether Stage 2 should be the end of their journey of building and committing to a high-quality set of engagement-focused programs while also committing to traditional programming in a more or less familiar form — or whether they were ready to embrace a more radical and wider-spread commitment to engagement. Of these four, one has decided to remain in Stage 2, supporting some engagement programming but continuing to keep traditional programming as its core commitment. Two have made considerable progress in building effective engagement programs and new staffing structures and processes to support them, but are still exploring whether and how to start truly integrating their engagement-focused programming with their more traditional programming. And it appears entirely possible that they'll commit to and sustain engagement programming as a separate, but equal, strand of programming alongside more conventional programming. The remaining organization of these four appears to have made

the discontinuous leap to Stage 3 with respect to its programming philosophy and staff embrace of engagement. But, at present, there remains uncertainty about whether this organization's board leadership and financial resourcing model will catch up and help propel it to Stage 4 — or will pull the organization back toward Stage 2.

Another five organizations entered NCAF at the pivot from Stage 2 to Stage 3, having progressed from Stage 1 to Stage 2 well before NCAF. For them, NCAF implicitly represented an opportunity — and the change capital necessary — to make the more discontinuous transition into Stage 3 and to begin preparing themselves to become a Stage 4 organization. In our view, all five of these organizations have laid the groundwork to move into Stage 4, slowly and steadily, in the coming years, and now lie either in the nascent days of Stage 4 or show promising signs of making Stage 4 sustainable. For the most part, they have successfully navigated the structural and philosophical changes necessary to integrate engagement and traditional programming, but securing both board support for engagement and the financial resourcing to sustain their embrace of engagement remains to be done.

The final organization looked like a Stage 4 organization as it entered NCAF in many ways, embracing a deep commitment to engagement as a way of creating art from the outset — but it needed to shore up other capacities in order to sustainably stay there. While this organization has built multiple new capacities over the three-year period, this statement largely remains true, and the organization has additional work to do to amplify its ability to sustain high-quality engagement programming into the future.

This degree of variability seems both healthy and natural; it's not obvious to us that all organizations need to embrace engagement as their identity in order to offer effective engagement programming. But it also strikes us that maintaining traditional programming and engagement programming at equally high levels is a difficult feat for any organization to sustainably pull off, as doing both increases demands on both staff and fundraising. We consider it a success, then, that so many of the Cohort 1 organizations have moved as far as they have toward integrating engagement into their core programming and beginning to embrace it as their identity — without prescribing that all arts nonprofits should follow that same path.

Managing change

Regardless of where they started or where they wound up at the end of the first round of funding, the 10 NCAF organizations experienced similar dynamics, successes, and persistent challenges in managing these changes:

- **Change is scary for the individuals living through it; it brings to the surface both fear of the unknown and fear of being left out.** It's axiomatic that change is hard, and for the individual leaders and staff members of grantee-partner organizations, the kind of transformational change experienced during NCAF was frightening on a personal level at times. (This was especially true for those who anticipated change to continue in the years to come.) Many distinguished the organizational change associated with NCAF, which involved staff member's roles, titles, and day-to-day responsibilities, from the kind of programmatic experimentalism and adaptation that they'd long been accustomed to: "With respect to interpersonal dynamics and workload: that's where the change is challenging. Changing titles, uncertainty, exhaustion are not quite the same as changing things up programmatically or curatorially," said one contact at a grantee-partner organization. In other words, though people may have been comfortable with uncertainty in programmatic and artistic domains, that experience

didn't quite make handling uncertainty about their own roles and relationships any easier. The reality for many NCAF organizations was that some job functions were reduced or eliminated during the transformation; while most attempted to find a place for staff members within their new structure, these changes still sparked a very real fear of being left out of the new reality — which, in turn, provoked natural resistance to the change itself: "When we talk about some kind of systemic change, that makes some feel that their place in the organization is threatened," offered one contact. "Then there's a clenching, a resistance to the change." Further, these kinds of changes are felt differently by people at different levels; those who are not directly involved in deciding how roles will change face anxiety about how changes will affect them personally, while the decision makers are burdened with the stress of making choices that they know will have personal ramifications for many. Providing a clear roadmap for how the change will unfold — even before the substance of the change itself has been decided or shared — has proven helpful in supporting staff as they navigate these fears.

"Changing titles, uncertainty, exhaustion are not quite the same as changing things up programmatically or curatorially."
— NCAF Grantee-Partner

- **Organizational change is planning-intensive work — which can, itself, require a change in the way that organizations approach decision-making.** In the early months of NCAF, grantee-partners were surprised by how much time and energy they were devoting to planning for the work, finding it uncomfortable to live in the abstract world of goal-setting and reflecting on how particular programmatic strategies would support their vision for engagement instead of jumping straight into implementation. Such intense planning processes ran counter to the natural, action-oriented strengths of many staff members, particularly those who were closest to engagement work to begin with, and who often live in a do-react-adapt reality. The time spent planning often felt exhausting and draining to many staff. But by the end of the first year of the grant period, many leaders and staff began to acknowledge that the intensity of the planning process was a growth opportunity — an opportunity to learn to step back and take the work slowly, in order to do it effectively. One said, "To do this kind of deep work, you really have to be able to stop and have conversations, have time to think, time to step back. That can be hugely challenging at a nonprofit arts org that is ... straining at the seams to do the programming it commits to with barely enough resources to do it."
- **Transformational organizational change requires ownership at all levels which, in turn, requires thick, frequent communication.** In all of the organizations, the period of reflection encouraged by the intensity of the planning work also created space to reckon with internal communication challenges. Each had started the grant period with a core group of people on the "NCAF team," but quickly discovered that other staff members' participation and commitment would be critical to success. And over time, it became clear that fostering buy-in from virtually the whole staff — even if their day-to-day roles were less affected by the work — would be necessary to realize the kind of transformational change that most were hoping to effect. So throughout the three-year grant period, communicating the vision for change, seeking input to inform and sharpen that vision, and working to gain commitment from all staff — or to figure out who was truly resistant to the work and might need to move on — has been a chief strand of the change management process. That's encouraged some to deeply investigate their culture of communication, and institute new standards to improve it (new rules of engagements during meetings, new kinds of cross-departmental meetings, etc.).

"To do this kind of deep work, you really have to be able to stop and have conversations, have time to think, time to step back."
— NCAF Grantee-Partner

It has also led many to realize that, especially at the executive leadership level, getting used to repeating the same message over and over again is simply a necessary part of the job. One leader told us, “Every day I have to remember that I just have to keep saying it [the mission and vision]. Within the institution and with the community, I have to say it over and over again, and ask people how they relate to it.” Successful experiences required attentiveness to the pacing of buy-in; the core programmatic team often internalized the new vision early, while others were still being introduced to it, giving rise to a temporary but unavoidable period of friction where some staff were eager to move forward while others needed to slow down.

- **Successfully progressing along this path requires learning what not to do, as well as learning to do new things.** As many grantee-partners noted in our conversations over the three-year period, “it takes capacity to build capacity,” so as they’ve developed new skills, created new staff positions, and taken on new kinds of work, most organizations also have had to stop doing some of the work that they’d previously been doing or to say “no” to some opportunities that came their way. For one organization, a major construction project that left its mainstage dark for over a season, created critical space for staff and leadership to “unbuild” existing practices and habits and then rebuild new ones upon re-opening. Without that stark of an opportunity to stop some things, other organizations have had to learn to say “no,” prioritizing some partner relationships over others or stretching planned

NCAF participant profile



Photo credit: Oakland Museum of California

Oakland Museum of California

Located in downtown Oakland, OMCA is a museum of art, history, and natural science with permanent collections in each discipline and a robust special exhibition program that includes arts, humanities, and science topics. The museum is also home to a free weekly event (Friday Nights @ OMCA) for the Oakland community that includes live music, food trucks, and participatory art-making activities. NCAF included both expanding OMCA’s

offsite engagement programming and beginning to dramatically change the museum’s onsite exhibition programming to reflect the Oakland community. Offsite, OMCA augmented its Rover program, an offsite mobile unit that takes free participatory art making events into Oakland neighborhoods that are underrepresented in the visitor base. Onsite, the organization has reimagined the process of developing and mounting exhibitions to highlight community voices, stories, and objects. For instance, the “Oakland, I want you to know...” exhibition was created out of conversations with community members and features a multimedia immersive installation of community groups telling the story of gentrification from the perspective of those affected by it. The Oakland Museum of California looked to build its organizational capacity by investing in strategies that could lead to stronger connections between staff, board, and community engagement practices. As a key component of moving engagement to the core in a sustainable manner, the organization aimed to incorporate community engagement across board and staff responsibilities, create new revenue streams, and expand its evaluation practices to include assessments of community engagement and social impact.

programmatic activities over a longer time horizon. Not all are fully comfortable with saying “no,” however, especially when it feels in tension with being responsive to, and an open partner with, community organizations. One leader summarized a dynamic that many experienced this way: “The more you strengthen relationships, the more that is demanded of you.”

- **Moving through these stages often means destabilizing the organization before being able to restabilize it.** For nearly every organization, and especially those that seem to have laid the most groundwork for a shift toward truly embracing engagement as identity as they enter the second phase of funding, there was some moment during the last three years when they felt a deep sense of instability. The organization’s identity, both internally and externally, was in flux; at least some staff members felt uncertain about what their day-to-day responsibilities and long-term future looked like; and/or the process of transitioning the organization’s business model spurred a deep sense of anxiety about its financial stability. But these moments of destabilization appear to be a necessary part of this kind of broad transformation. Trying to achieve a new equilibrium without going through a period of disequilibrium may simply not be possible. And for at least some, the new “stability” is itself relative; to truly embrace community-responsiveness, organizations need to become adept at living with uncertainty, gaining the ability to adapt and be flexible to changing circumstances with a manageable level of anxiety. Strong and committed leadership is essential for moving through the destabilization period effectively, and for making it okay to staff to live with ambiguity. A contact at one grantee-partner put it this way: “Leadership has to remind people that this is where we’re supposed to be. Some staff get anxious, but stability is a fallacy. It’s false to ask when it’s all going to settle down.”

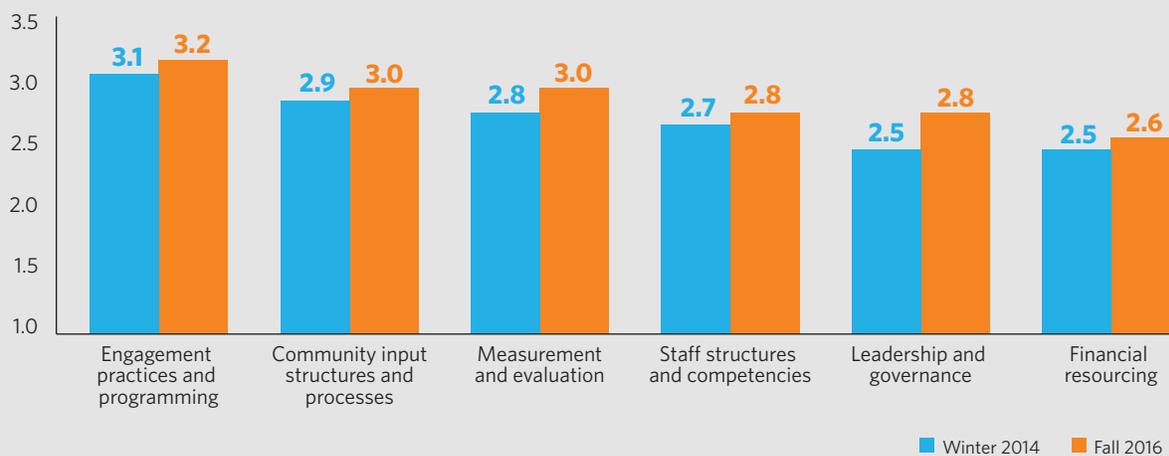
“Stability is a fallacy. It’s false to ask when it’s all going to settle down.” — NCAF Grantee-Partner
- **Given all this, the appetite for radical change will be a lot lower if organizational leaders are only interested in changing a program or two.** While the 10 NCAF grantee-partners were selected for their commitment to engagement, there were nevertheless instances during which organizational leaders were hesitant or resistant to committing to the kind of broad organizational change suggested by the phrase, “drive engagement to the core.” One leader observed to us, “Some others in the cohort are focusing on a piece of what they’re doing. That may be easier in some respects, but could be harder. How do you put a stake in the ground on just one thing? It feels two-headed, like you’re trying to stay the same and change at the same time.” As noted previously, some entered NCAF seeking to enhance their long-term organizational sustainability and saw being more relevant to ethnically diverse or low-income communities as a vehicle for that — but one which was attractive only if it didn’t pose too much risk to organizational stability. These leaders tended to waver between seeing engagement as a program (and naturally expressing concern about undertaking radical change when only a program or two was at stake) and seeing opportunity for more dramatic change (but wanting to move slowly and be cautious about moving away from too much of what had made them successful up to that point). Ultimately, one leader felt that the risk associated with broad change was too great and opted not to seek a second round of funding. Other leaders who have approached the work cautiously have re-committed to it, but seem open to the idea that fully embracing engagement as identity may not be their end goal.

Six dimensions of change

At the beginning of the grant period, in collaboration with Irvine and the 10 grantee-partners, we identified six broad areas of organizational capacity — engagement practices and programming; community input structures and processes; leadership and governance; staff structures and competencies; measurement, evaluation, and continuous improvement; and financial resourcing to support engagement — as being essential to the mission of driving engagement to the core. In each of these areas, we hypothesized that shifts in attitude and philosophy, gains in tangible skills, and the adoption of new behaviors and practices would support organizations' progress toward embracing engagement as identity.

To track these shifts, we developed a customized survey, modeled on the Organizational Capacity Assessment Tool developed by McKinsey & Company. For each of the six focal areas of organizational capacity, the survey includes three to six dimensions that further define the specific attitudes, skills, and behaviors encompassed by each area. For each dimension, we provided a four-point scale, with each point on the scale defined by a brief, unique description of organizational capacity along that dimension, ranging from low capacity to high capacity. We administered the survey twice, once in early 2014 and once in mid-2016, and asked multiple staff members at each organization to complete it each time. As such, the ratings represent a composite, but self-reported, perception of how each organization fared in each area. Throughout this section, we provide aggregate ratings across the cohort for each specific dimension, as well as average scores across all of the dimensions within each of the six outcome areas. Note that, because of the relatively narrow scale used to define each dimension, we generally regard a difference of at least 0.2 points to suggest meaningful, albeit modest, growth.

Figure 1: Average response per organizational capacity area



Source: Organizational Capacity for Engagement Survey

In aggregate, the cohort improved in each of these broad areas over the three years of the grant period (see Figure 1). Befitting the fact that all were selected because of their experience with engagement-focused programming, external-facing areas of organizational capacity (engagement practices and programming, and community input structures and processes) were the strongest to begin with. In aggregate, the organizations experienced modest advances in each of those areas over the three years. The remaining areas, all having to do with internal processes, practices, and infrastructure, were lagging behind at the start of the grant period — which is not a surprise, given the preponderance of program-specific funding in the arts and relative lack of funding for institutional support. These areas — with one exception — were the loci of the biggest advances over the grant period, helping to shore up the organizational structures that support engagement-focused programming. In particular, the progress shown in leadership and governance, which was the greatest across all six areas, appears to have been critical in moving so many organizations toward a widespread embrace of engagement.

In aggregate, the cohort improved in all six areas of capacity measured. Progress in leadership and governance was greatest and appears to have been critical to widespread embrace of engagement.

An area in which relatively little progress was made was in financial resourcing to support engagement — the thorny question of how to build new revenue models around engagement-focused programming. As much of the original cohort transitions into a second phase of NCAF funding, this area is receiving renewed attention, with all organizations making it a priority in the next three years.

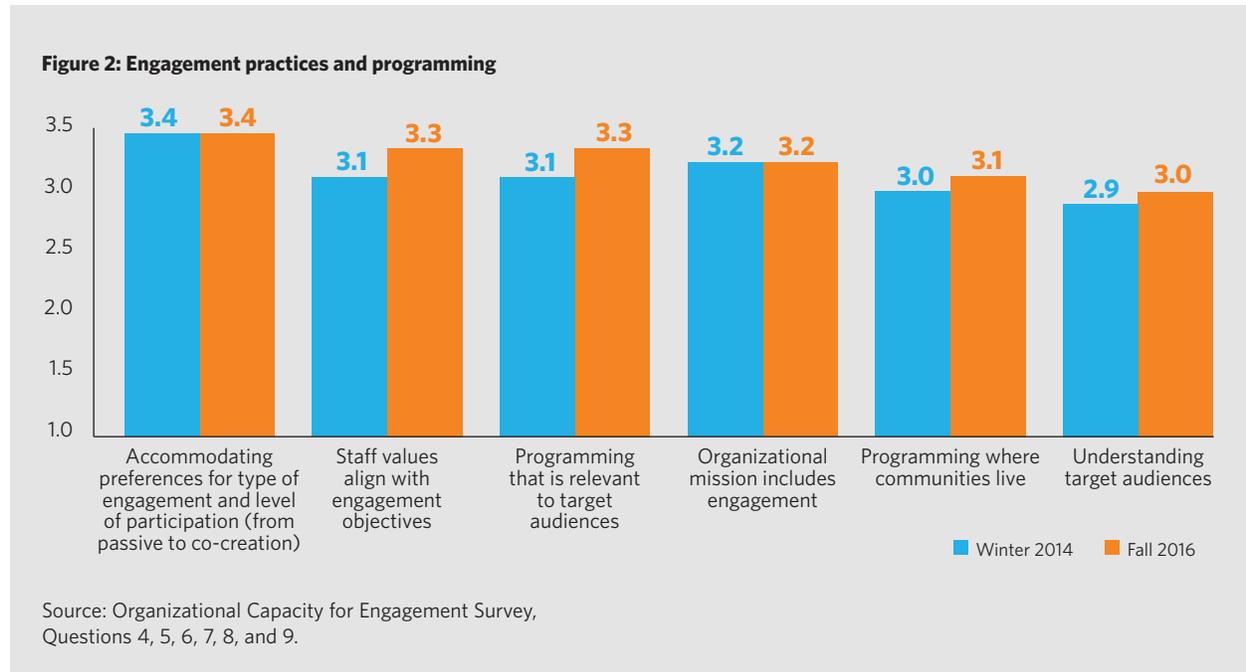
In the remainder of this section, we consider each of these areas in-depth, looking at changes in the individual dimensions assessed within each on the organizational capacity survey and exploring other patterns observed in our qualitative data collection with the grantee-partners.

A. Engagement practices and programming

To drive engagement to their core, arts organizations of course need to have the ability to do engagement — to program in ways that are relevant to the communities they seek to engage and to hold certain attitudes about the value of engagement work, such as having clear aspirations for engagement embedded in the mission or vision. The 10 grantee-partners entered the grant period with considerable strength in this area, identifying “engagement practices and programming” as the area in which they were best equipped to support a thorough embrace of engagement. Of course, their programmatic strength was what made them prime candidates for the New California Arts Fund and their commitment to it was what made NCAF an appealing opportunity. Nevertheless, the cohort continued to work on their engagement practices during the grant period, honing their programming to become more relevant and inclusive of the communities they were hoping to engage and aligning their values around engagement as a critical programmatic strategy.

The relevance and inclusivity of the organizations’ programming was supported by small, but nevertheless important, shifts in several specific areas (see Figure 2). In aggregate, grantee-partners became better at providing relevant programming — through all of the mechanisms discussed in the prior section — and offering more and higher-quality programming in locations that attract the communities they hope to engage. And though the survey results show no additional movement in the organizations’ ability to offer audiences and program participants many different ways to engage with content, this dimension remains one of the most highly rated dimensions we asked about.

But in addition to these capacities, which inform the programming itself, driving engagement to the core requires a shared sense of engagement as a priority, and as a set of values that attach to all that an organization does, not just one program. Though the gains made in this area — represented by the pervasiveness of staff values around engagement and the alignment of the mission with engagement — were modest in the aggregate, those that experienced the biggest jumps were among the organizations that now seem closest to embracing engagement as identity. We also observed a number of important ways in which organizations worked, and continue to work, to align the organizational mission and staff values around engagement.



A more holistic approach

As they've worked to drive engagement to the core, NCAF organizations have shifted their definition of engagement in at least two ways. First, they've stopped thinking of engagement as an outreach or marketing function, which takes a given artistic program or product and attempts to attract the members of a particular community to it. Instead, they've begun seeing it as a way of building relationships with the communities that they're seeking to reach — relationships that don't begin by soliciting community members to attend a program, but that include a substantial investment in time to simply get to know a community and their needs, interests, and values. One told us, "We used to be an outreach institution and we've changed. How we define co-creation has evolved; I was terrified of the idea of co-creation because it sounded impossible to do. Now I find co-creation to be very exciting." Many cohort members referred to this work as "showing up": spending time in and with the community, attending their events, and listening to them, without trying to "sell" them on the organization's programming. As we'll discuss

NCAF organizations have stopped thinking of engagement as simply an outreach or marketing function and have begun seeing it as a way of building relationships with the communities that they're seeking to reach.

in the next section, this work is a natural and necessary precursor to gathering community input and perspectives. In fact, those that entered the cohort with engagement already being closely aligned with their missions emphasized early on the importance of not conflating engagement with marketing: “It’s really important to know when you’re talking about engagement and when you’re talking about marketing. There’s nothing wrong with marketing but when you’re not clear about the distinction and confuse the two, it can be problematic ... you can lose trust [of the community].” And in our view, those that continued to see engagement first and foremost as an approach to marketing their programming seemed to embrace only incremental changes to their programming. They kept hoping that “engagement” would bring new communities to traditional programming, without actually seeking to change the underlying programming with the community’s needs in mind.

Secondly, they’ve stopped thinking of engagement as a program and started seeing it as a strategy or approach that they can take to develop any and all programming — a shift that’s proved critical to making engagement sustainable. Or as one leader put it, “One of the big things we’re trying to communicate to staff is that community engagement is a process, not an outcome or a product.” For instance, at the beginning of the grant period, one organization was structured around three separate program types: its mainstage performance series, its K-12 education programming, and engagement programming (including community tours of more experimental works and partnership programming with community-based and social service organizations). As the organization continued to develop the engagement programming, however, leaders began to feel as though this structure was actually saddling them with three separate business models, none of which was sustainable, particularly from a staff capacity perspective. In the final year of the grant period, the organization reorganized its structure, breaking down the silos between different types of programs and beginning to see “engage” as a strategy that could — and should — be incorporated into all programming. Even the organization’s mainstage works are now informed by the deep relationships they’ve built with community partner organizations; a recent production layered the voices of the women served by a domestic abuse program into a theater work about marriage. Others also have begun to think of engagement as a way of building relationships with community partners and community members, relationships which then inform work in a variety of ways or which become the substrate out of which new artistic works or new programs can grow.

NCAF organizations have started seeing engagement as a strategy they can take to develop any and all programming.

Addressing artistic excellence and authority

Institutional acceptance of engagement as a contributor to, rather than a detractor from, artistic excellence appears critical to making the shift from Stage 2 to Stage 3 of our model. For almost all organizations in the cohort, the first year (and sometimes beyond) of the grant period was rife with discussion and debate about the perceived “tension” between engagement and quality — the concern that programming that was co-created with community, or which allowed for other forms of active, creative participation from community members, would necessarily generate art that was lesser than that created purely by professionals or through institutional processes. In some organizations, individuals in key leadership positions reflected this tension, championing engagement-focused programming only to the degree that it, in their view,

Institutional acceptance of engagement as a contributor to, rather than a detractor from, artistic excellence appears critical to making the shift from Stage 2 to Stage 3 of our model.

didn't begin to compromise artistic excellence or diminish the importance of high-quality curatorial or artistic training. In others, members of the staff, often in curatorial or artistic planning positions, were the repositories for these concerns. Over time, however, these concerns have diminished, even if they haven't been completely eradicated, with the organizations that are currently best set up to embrace engagement as their identity seeing community engagement as a hallmark of excellence. For them, artistic work that doesn't reflect the community and their priorities has less social and aesthetic value than work that is divorced from community, however beautiful it is.

One byproduct of these shifts is that some organizations also have begun to rethink and redefine the nature of their expertise and authority as cultural institutions. One of the performing arts presenters in the cohort traditionally saw its authority as residing in its production and operational expertise, offering performers a set range of logistical and technical supports to help them execute a high-quality production. As the organization has begun to import the relationship-building skills developed in offsite programming with community partners to its home venue, staff and leaders have begun to evolve their own thinking about the value that the organization provides to artists. They now frame it as being attuned to emerging talent in the community and supporting that talent in developing a production, and as creating space for artists to help each other refine their work. Another has been

NCAF participant profile



Photo credit: Pacific Symphony

Pacific Symphony

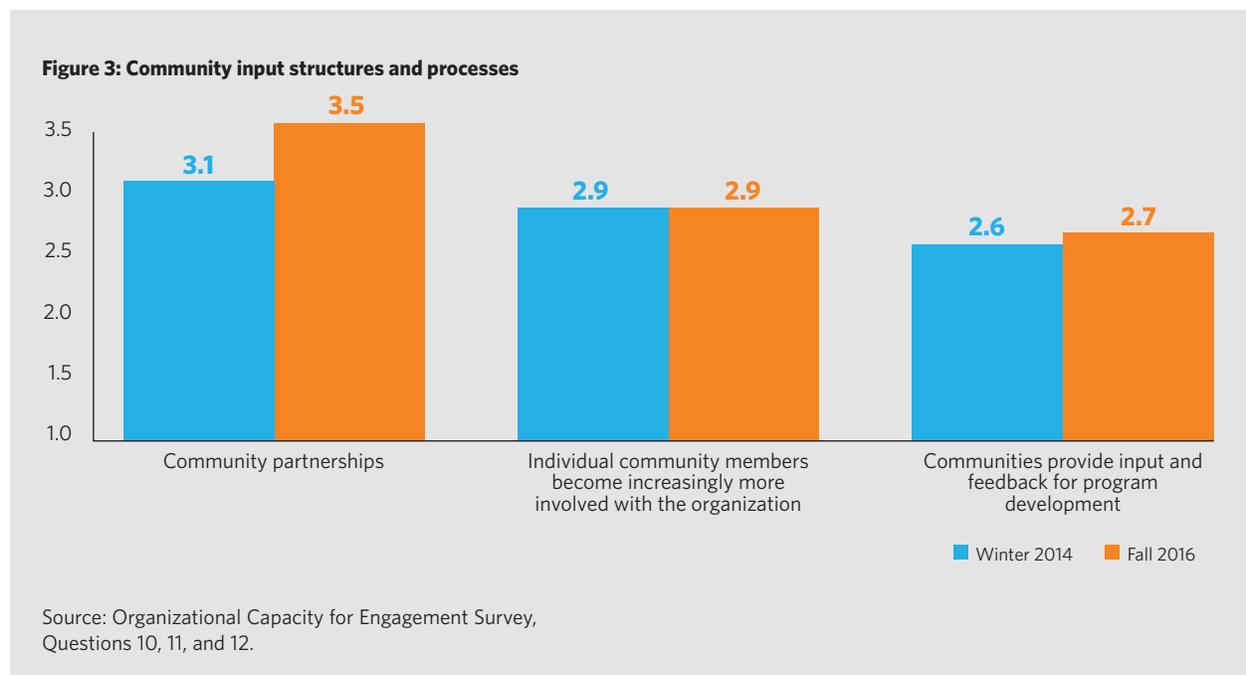
Founded in 1978 and led by Music Director Carl St. Clair for 28 years, Pacific Symphony performs classical and contemporary orchestral works, producing more than 100 symphonic concerts and hundreds of educational events throughout each year at its home at the Renée and Henry Segerstrom Concert Hall in Costa Mesa, as well as in venues throughout Orange County. Focusing on the Chinese American communities of Orange County for NCAF,

Pacific Symphony has created a suite of initiatives in partnership with community organizations. The Symphony developed a close relationship with the Irvine Chinese School, creating a "Strings for Generations" program that provides students and their parents with musical instruction and opportunities to play together. The Symphony's relationship with the school also helped catalyze a free, day-long Lantern Festival to celebrate Chinese New Year. A special Chinese New Year concert included participatory strategies and featured 300 community performers alongside professional musicians. Pacific Symphony focused on enhancing its organizational capacity in three key areas: data management and analysis; learning from and building relationships with community partner institutions; and building and effectively managing its volunteer base. To reach its data-focused goals, the Symphony planned to upgrade data management software, create standards for staff to collect and enter data, and hire a data services director. Strategies to build better, more meaningful relationships with community partners included conducting research to learn more about the communities in an in-depth way and providing cultural competency training for staff. Additionally, the organization planned to build a more robust and directed volunteer group that better reflects the communities it hoped to serve.

redefining what it means to be a curator, seeing curatorial expertise as being less about exercising scholarly authority when selecting and interpreting works, and more about paying attention to community discourse and grassroots forms of creative practice and programming. In both of these cases, as well as others in the cohort, the institutional role is facilitator rather than authority; they're making the creative practice and artistic production of others possible and finding ways for their artistic programming to exist in a dialogue with contemporary community priorities and concerns.

B. Community input structures and processes

As engagement has increasingly come to mean the process of building relationships with community partners and community members, out of which new programming is generated, the skills, attitudes, and processes associated with community input have become increasingly intertwined with those associated with engagement programming. So it's no surprise that this area was also one in which there was a considerable foundation to begin with, and that important advances were made during the grant period. In fact, experience in establishing and maintaining strong partnerships with community organizations saw the second-largest perceived gain among all of the dimensions addressed on the organizational capacity survey, with eight organizations showing substantial gains of 0.4 points or higher (see Figure 3). Throughout the grant period, we saw partnerships become the primary platform for organizations to gather community input.



Deliberate approach to partnership

Over this time, the organizations that have shown the biggest advances in the quality and impact of their community partnerships have become far more deliberate about the processes that they use to select organizations with which to partner. One described partnerships as the “stand-out” strategy that afforded them the ability to dramatically increase their engagement with members of the Latinx

communities in the city where the organization was based. The data this grantee-partner collected from participants demonstrate robust increases in such engagement. But the first partnership with a community organization that the grantee-partner developed toward this end languished for many months, with both sides being unsure how to make it successful. When the arts organization saw its next community partnership take off quickly, staff and leaders realized that there simply weren't enough shared values between their organization and the first partner. Since then, they've paid close attention to values alignment when selecting partners.

Another grantee-partner described its evolving understanding of what makes for a genuine partnership this way: "Previously, we were calling something partnership that wasn't really that. These relationships would happen when board members or leadership would say, 'You should work with these people, they're great. Go talk to this CEO and work with them.' But we've since found that just because leadership wants to make a partnership work doesn't mean that it's aligned with our needs." Many have expressed a similar sentiment about the importance of mutuality in developing the "right" partnerships. One organization can't approach another only with its own goals in mind; there needs to be some common and shared understanding of the goal of the partnership and space for each to learn about the other's priorities. We observed the opposite approach in one of the two organizations that downshifted to partnering in more limited, "one-off" ways over the grant period. This organization found it difficult to establish a community advisory panel, in part because it wanted panel members to support the organization's agenda, first and foremost, and to leave their own agendas at the door.

The organizations that are strongest in this domain also have been attentive to building the partnership first, and then letting programming stem from that relationship, rather than assuming a particular programmatic format or concept before establishing the partnership. One defined this as the heart of true partner-based engagement: "Engagement is entering into a dialogue and conversation with people outside of the organization around mutually shared goals, but without knowing what the result will be. We create something together." When the product has preceded the process of mutually establishing an outcome, the partnership has suffered. As one group told us, "our biggest missteps have been when we pushed the product out ahead of building the relationships."

"Engagement is entering into a dialogue and conversation with people outside of the organization around mutually shared goals, but without knowing what the result will be. We create something together."
— NCAF Grantee-Partner

Making time for new relationships

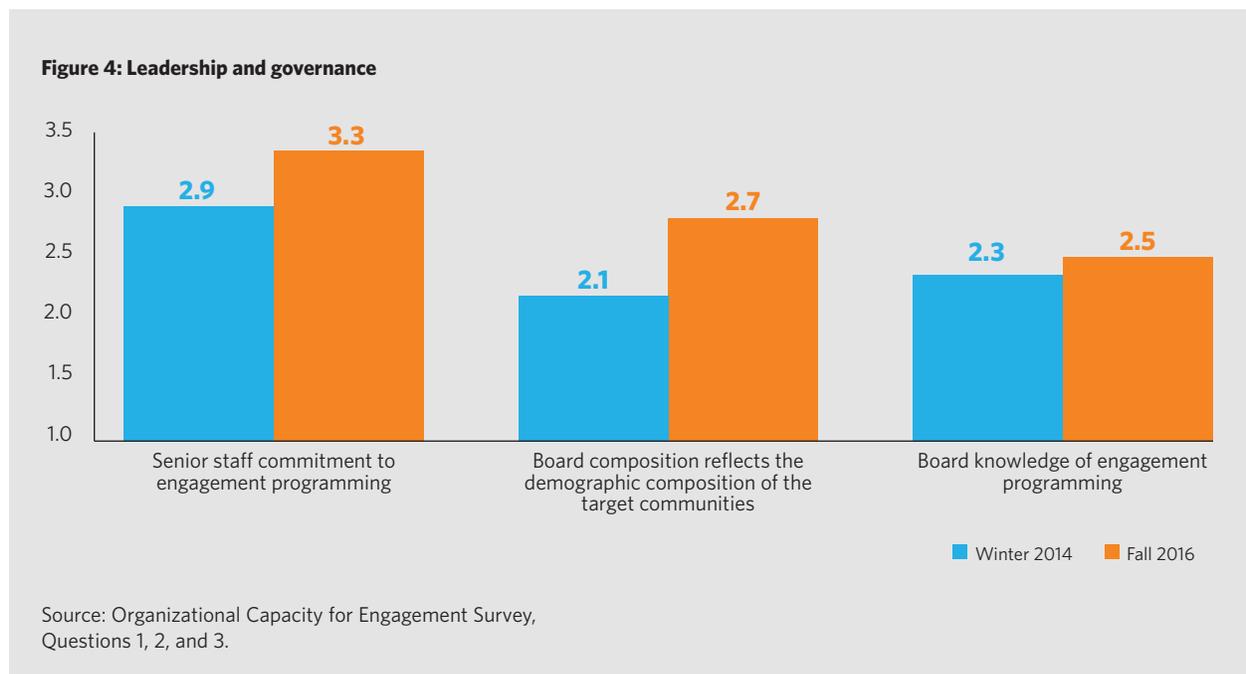
But while partnership-based work has become a central strategy for many, most also acknowledged that it's a resource-intensive way of working — and one that is difficult to bring to scale. Building new relationships with community organizations is slow-moving work, and can't be done successfully without investing the time needed to build trust — especially when a large, well-resourced, and largely white organization is attempting to establish relationships with smaller organizations grounded in communities that have a history of being exploited by those in power. While organizations learn new lessons with each partnership they establish, that insight doesn't necessarily enable them to establish their next partnership more quickly or more easily. They still need to invest the time to build each new relationship, even if they've become more adept at knowing which strategies work best for building relationships. One contact at a grantee-partner organization said, "Work with community takes a lot of time and is about relationships and trust building. We don't want to do it in a surface

way.” If partnerships are forced to fit a template, they quickly lose the give-and-take necessary to foster authentic alignment. Moreover, because partnerships rely so heavily on relationships between individual staff members, they are vulnerable when key staff turnover. All of this means that, while partnership appears to be an extremely successful strategy for engaging ethnically diverse or low-income communities, it’s also a strategy that is hard to sustain without substantial funder support.

As partnerships have come to dominate organizations’ strategies for seeking community input, other strategies have been given less attention and investment. As a cohort, the grantee-partners have done little to enhance the opportunities for individual program participants to increase their involvement with the organization — a step that ultimately may prove necessary to building a bridge toward sustainability. One even said, “Our best road to diversity is through volunteering,” and, as we’ll discuss below, cultivating new individual donors, often at lower giving levels, is emerging as one potential strategy for sustainability. And organizations’ capacity to gather programmatic feedback from individual participants remains modest.

C. Leadership and governance

Leadership commitment to and investment in engagement work is a decisive factor in how deeply an organization is able to embrace engagement as identity. It’s the area in which we’ve observed the biggest advances, in aggregate, with respect to attitudes that are hospitable to engagement, though we have also seen even the most committed staff struggle to move their organizations forward when their executive leadership is less than fully on board (see Figure 4). And we’ve observed that there are two separate leadership entities whose buy-in is important for driving engagement to the core — executive-level staff leaders and board members — and that their embrace of engagement rarely occurs in lockstep. Though many have shown great gains in diversifying their boards, true board buy-in for engagement has been slower to happen.



Executive leadership

The majority of the cohort entered NCAF with executive-level leaders championing the shift toward making engagement a core part of their organization's DNA. In a couple of cases, the executive-level leaders were new or relatively new to the organization and brought with them a passion and a mandate to become more participatory, civically engaged, inclusive, and relevant; the work that they did through NCAF was work that they would have embarked on anyway (albeit more slowly). Other leaders weren't new to their organizations, but had been piloting them in a direction that aligned with engagement priorities for many years and saw NCAF as an opportunity to accelerate their progress along that path.

The commitment of these leaders provided critical fuel for their organizations to embark on and endure the change process. As one mid-level staff member reflected, "[Our executive director's] leadership is so critical. Having a leader who can articulate the vision and the level of effort necessary has been key." In particular, executive leadership commitment made it possible for these organizations to turn the corner from offering some engagement-focused programming to integrating engagement into all that they do. Their ability to articulate an urgent vision for change, to kick off shifts in internal structures, and to give credibility to engagement-focused programming (and the staff charged with it) made it clear that NCAF represented a change that was intended to stick, not merely a time-limited funder imperative, and that the changes were meant to encompass the full organization, not just a department. In other words, executive leadership signaled that the organization was undertaking a through-and-through culture change and, as one said, "internal culture has to come from the top." In this, the executive plays a critical role as communicator: communicating the vision for engagement to all staff, articulating the strategies for change, and offering sanction and support for the tactics that make change happen. Executive-level communication has been particularly important in helping organizations to accept that engagement and excellence can be mutually enforcing, rather than in tension.

Executive leadership commitment made it possible for these organizations to turn the corner from offering some engagement-focused programming to integrating engagement into all that they do.

Though an organization can advance its engagement work without a leader who is pushing things forward (as long as that leader isn't actively resistant to it), there are nevertheless limitations of having an executive leader who sees his or her role as detached from engagement, even if this person supports the effort at a theoretical level. In these instances, the engagement work tended to stay within a small number of departments and the participatory, co-creative, community-driven, or civically minded impulses driving engagement-focused programming were less likely to infiltrate more traditional programming.

It was common for those outside of the core NCAF team to revert back to traditional practices and habits, or to assume that the focus on engagement would end with the grant. Those at the director or vice president level bore the burden of keeping other staff focused on the mandate for change beyond this particular funding initiative, but from a position of inherently less authority than the executive's. One told us, "People will default to what's old and comfortable, and I have to remind them of the strategic plan and remind them of this initiative and how things are changing." In this, the relative lack of involvement from executive leadership had a potential silver lining: opening up opportunities

for middle- and junior-level staff to champion the work that they felt most passionately about, and empowering them to lead the NCAF work. This was rewarding for the individual staff involved, but without an executive actively helping the organization lean in to engagement, the impact of NCAF on the organization as a whole was tempered.

Board leadership

Board-level involvement in engagement is ultimately necessary for organizations to fully embrace engagement as identity; but we've observed that, even in organizations with executive leaders who are strong champions of engagement, the board has been slower to play an active leadership role. Some boards have begun to show resistance to the notion of driving engagement to the core as programmatic and organizational changes have come to fruition, even as they have supported engagement programming.

This has been especially true when programmatic changes have had two kinds of interconnected implications: when engagement principles have begun to palpably affect the organization's core or traditional programming, and when the broader organizational transformation process has started

Some boards have begun to show resistance to the notion of driving engagement to the core as programmatic and organizational changes have come to fruition.

NCAF participant profile



Photo credit: Santa Cruz Museum of Art & History

Santa Cruz Museum of Art & History

In the early 1980s, the longstanding Santa Cruz Historical Society and the then-upstart Art Museum of Santa Cruz County merged to form the Santa Cruz Museum of Art & History (MAH). In 2011, following years of financial decline, the museum hired participatory programming specialist Nina Simon to reboot the museum; it has since shifted to a more co-creative approach to planning exhibitions and a highly event-activated approach to drawing in visitors.

Like others, MAH invested in both onsite and offsite engagement work during NCAF, with a particular focus on engaging members of local Latinx communities in Santa Cruz. Onsite, in addition to focusing on making the museum more welcoming through bilingual signage, MAH redesigned its history gallery to include community artifacts and themes that better reflect the many communities of Santa Cruz and continued its thriving First Friday and Third Friday event programming. Offsite, MAH deepened collaborations with partner organizations to co-create programs and events. The organization also aimed to improve staff and board capacity and use evaluation and measurement in order to guide decisions about programming and continue to evolve its business model toward greater sustainability. Furthermore, MAH focused on strengthening connections between staff, board, and volunteers so that they can better engage with Latinx families in Santa Cruz.

to affect the organization's business model. For instance, when engagement-inspired shifts in more traditional programming have been to the dismay of a small but vocal number of subscribers, members, or individual donors, some board members have questioned whether change at the scale of the organization's ambition is truly necessary. These cases have inspired the most fraught discussion between staff and board, and have sometimes resulted in the organization having to slow down or scale back its ambitions. These pockets of resistance are particularly intense when some board members, usually those who are longest-serving, persist in seeing engagement as anathema to artistic quality (one described board members asking, "Why not just make good art?"). In these instances, because the board members may not personally want to participate in engagement-focused programming, it's natural for them to question whether it really ought to be the priority of the organization. To counter this, many grantee-partners continue to work on creating opportunities for board members to participate in engagement programming. One described this arc, saying, "We're trying to move to more concrete opportunities for board members. If we keep it at a theoretical level, many board members feel onboard, but no one would show up at community events. So an upcoming board meeting will take place at one of our community partner locations. We've also started to do board listening circles, to solicit feedback but also as way to get the board members informed on what we do."

"We're trying to move to more concrete opportunities for board members. If we keep it at a theoretical level, many board members feel onboard, but no one would show up at community events."

— NCAF Grantee-Partner

When the organization encounters resistance from the board, executive leaders have a particularly important role to play: actively cultivating the board's buy-in to engagement work, while managing staff disappointment that the work isn't advancing quickly enough. One artistic leader described being a mediator between staff and board, managing the board's concerns about whether changes to the organizations' traditional programming would alienate the current audience — and therefore threaten the organization's financial base — while also giving space to the staff to grapple with the tension between the board's perspective and their own conviction that the traditional programming needed to change. Another said, "[The board's involvement] has been hard on the staff, especially those working in engagement who think of themselves as social justice warriors." In organizations where the executive or artistic leadership was less actively involved in engagement work, the board's desire to go slow or do less to change core programming was likely to win out, leaving some engagement staff feeling demoralized.

Other boards have embraced engagement but have been slower to fulfill the fund development role that the organization needs them to play to ultimately be able to sustain the engagement work. These organizations have had just as much work to do with their boards as other organizations, but they've had to spend that effort on enhancing the board's capabilities and capacity to fundraise effectively rather than on getting board members to believe in the importance of engagement. Some have offered training for board members in how to effectively tell the story of the organization and represent it to external constituencies. Others have introduced new giving requirements for board members, sometimes in combination with strategically declining to renew board members whose terms were coming to an end while actively seeking out new board members

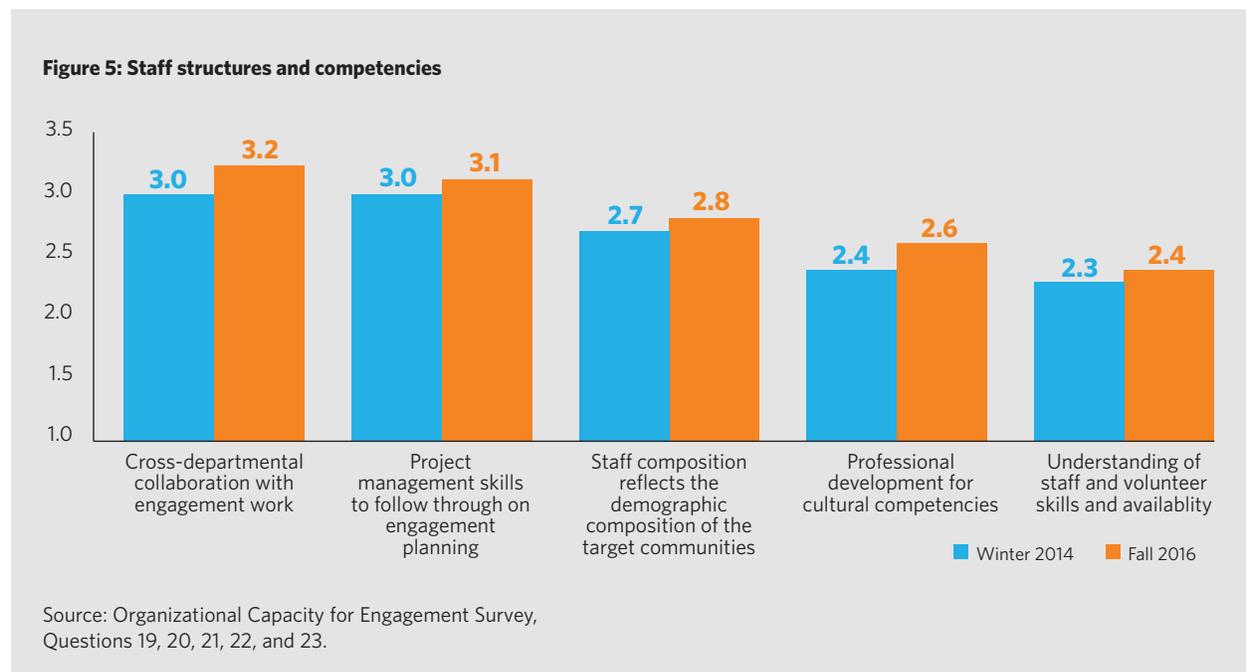
Boards have embraced engagement but have been slower to fulfill the fund development role that the organization needs them to play to ultimately be able to sustain the engagement work.

of means to replace them. And some have felt a cultural tension that is, in some ways, the inverse of the tensions described above, with long-term board members worrying that the organization was leaving behind its community roots by seeking out board members with means: “There’s a group of folks who really love the organization as it is. When arts organizations make the next shift, especially in communities of color, people feel it’s no longer a place for them.”

These organizations describe a delicate balancing act in trying to find new board members who are committed to the engagement work and pushing it forward, while also being adept fundraisers. One organization has prioritized local corporations as a source of new board members, but has found that some potential candidates see board membership as a personal networking opportunity and are therefore looking for opportunities to join established boards, whose members are already well-heeled and well-connected. Organizations may be bumping up against an inherent tension of this work: leveraging an inherently exclusive institution (the nonprofit board) as a vehicle for sustaining work that is about inclusion and access.

D. Staff structures and competencies

While we view leadership as essential to driving engagement to the core, much of the hardest work of organizational transformation has occurred at the staff level, in redefining roles and responsibilities, establishing new ways of working across departmental or functional boundaries, and investing in building the collective cultural competence of the staff (see Figure 5). Again, the organizations that have shown the biggest aggregate advances in this area are among those that appear closest to a thorough embrace of engagement. All of the grantee-partners started NCAF with a small group of staff who were deeply invested in and committed to engagement work. Some of the biggest changes — and challenges — have come in extending engagement-aligned values throughout the rest of the team.



Changing responsibilities, changing structures

One factor that has made extending engagement throughout the staff difficult is that most organizations include some job functions where professional standards exist in some tension with the kinds of practices embodied in engagement work. For instance, among the museums in the cohort, curators, registrars, and preparators have long been trained to protect art works and objects from the public, presenting works in ways that keep them separate and safe from visitors. And the curatorial function, in particular, is grounded in the assumption that appreciating and understanding art, and discerning artistic excellence, takes specialized training. So when engagement-focused programming includes opportunities for visitors to touch art works, contribute their own objects to exhibitions, share their perspective in ways that put it on equal footing with scholarly perspectives, or exercise their own creativity, it can naturally feel at odds with the traditions in which the individuals in these roles have been steeped.

These programs represent a different vision for what happens in a museum and the very definition of what an exhibition is, requiring collections and curatorial staff to “unlearn” elements of their training. One museum leader told us, “We’re working against perceptions that museums just don’t do this. Are we going outside of our lane? Are we forgetting our commitment to collections, scholarship, art? We’re working with professionals who take pride in their [curatorial] accomplishment. But with shifting definitions of success, it feels tentative.” Another told us, “It’s like there’s no tolerance for change for a group of people who have a very clear sense of what their profession is.”

“We’re working against perceptions that museums just don’t do this.”

— NCAF Grantee-Partner

For these professions in the museum field and for roles like music director or artistic director in the performing arts world, embracing engagement-aligned values includes the difficult, and often uncomfortable, work of opening themselves and their work up to criticism from their peers in other institutions, and of pushing themselves into unknown and sometimes untested waters. And for them to do so, it also requires compassion and patience on the part of engagement-focused staff; they need to give their colleagues the time and space to get comfortable with the organization’s new direction and to be careful about not, in the words of one grantee-partner, “demonizing” individuals in the functions that have been slower to embrace engagement. In disciplines like classical music, which places a high value on tradition, there are strong views about what constitutes “professionalism,” which can rub against the demands of engagement. Classical musicians place a high degree of emphasis on musical training and, consequently, have received less training in the relationship-building skills necessary for engagement work.

To bring along the individuals in these functions, as well as others who haven’t typically been actively involved in engagement-focused programming, the NCAF organizations have acted very deliberately to create new patterns of internal communication and collaboration. Often supported by strategic planning processes, most organizations have thought critically about how to change the organizational structure and individual roles so as to integrate engagement work into the day-to-day experiences of staff members outside of the core engagement team. And in order to spread the values associated with engagement beyond those who initially bought in, grantee-partners have established new cross-departmental meetings, opportunities to discuss the ongoing changes at the organization, and — when possible — opportunities for collaboration between different teams or departments.

In fact, we found that gains in organizations' self-reported capacity for cross-departmental collaboration were correlated with gains in other important areas, such as senior staff's commitment to engagement, providing community-relevant programming, and even having capital to sustain engagement. For instance, one grantee-partner established an internal team, composed of individuals from each department, that participated in discussions about engagement-focused work and the ongoing transformation of the organization to drive those values to the core. Members of this team were then charged with taking that information back to their departments to champion the work among their colleagues and serve as a sort of engagement hub within their department. (One organizational representative described it this way: "Each engagement team member technically reports to their original team. But they're reporting up and providing a focused perspective that comes from their responsibilities on the cross-departmental engagement team.") This speaks to another important dynamic related to staff collaboration: we observed that organizations that advanced the most during NCAF distributed leadership on engagement throughout the organization, rather than concentrating it solely within the executive team, and leveraged that distributed model to facilitate communication from the executive team to on-the-ground staff and vice versa.

Organizations that advanced the most during NCAF distributed leadership on engagement throughout the organization, rather than concentrating it solely within the executive team.

One consistent challenge has been for organizations to create new communication practices that provide staff who aren't directly involved with engagement work with clarity about where the organization is heading, while avoiding being overly prescriptive and top-down. One said, "The challenge in communicating to the rest of the staff is not doing it in a way that's just dogmatic and theoretical. We don't want to just lecture to them; we need to find a way to put the initiative in context." Another made positive strides by rethinking the ways that senior staff and others operating at a strategic level communicate and collaborate with staff responsible for program implementation. To change a culture in which frontline staff sometimes felt that they were being asked to accomplish difficult implementation feats without the support from senior staff needed to do so successfully, this organization incorporated more opportunities for implementation staff to share their concerns and to troubleshoot anticipated challenges in dialogue with senior staff.

For some of the smaller organizations, NCAF supported communication in profound, but prosaic ways; one upgraded to Office 365 to better support internal communication and document sharing, which the organization would not have been able to do without the infusion of capital that NCAF provided. And as the work has advanced, some grantee-partners also have had to actively create opportunities for staff who aren't directly involved in programming to participate in it, to help them truly internalize what the organization is working toward. One asked, "How do we give accounting staff the time and obligation to be at programs? We have to invest in their relationship to the programming to make the work a reality for them. We can't typecast staff based on their departments. We have to invest in people's opportunity to discover our mission in a deeper and deeper way."

"How do we give accounting staff the time and obligation to be at programs? We have to invest in their relationship to the programming to make the work a reality for them."
— NCAF Grantee-Partner

Staff turnover and training

Of course, even with deliberate attention to bringing the full staff along as the organization drives engagement to the core, not all staff will get there and the NCAF grantee-partners experienced a moderate amount of turnover during these three years. To some extent, this is a natural part of any kind of organizational transformation; some staff simply won't be up for the kind of radical cultural change, and its implications for their responsibilities, that organizational transformation represents. For NCAF, in particular, the nature of the organizational transformation crystallized for some staff members that they'd really rather be part of a more traditional arts organization. As one said, "Any time an organization goes through change, they have turnover. It makes people ask whether they're committed to this." While these departures are seen to be positive in the long run, they nevertheless make the work harder in the short run as organizations face acute capacity constraints that make it difficult to get everything done. Turnover also leads to some loss of institutional knowledge, and it can slow the work down as staff who remain try to pick up the work done by others.

To counter this, all grantee-partners needed to hire new staff members to undertake their NCAF work, to tackle the additional demands of the project (or to replace staff who left), and to acquire the skills and experience necessary to do the work at a high level. Of course, bringing new staff members into an evolving structure is a challenge unto itself, and one where timing is critical. We saw some organizations hire staff members with strong backgrounds in community organizing and community engagement early in their transition, before the organization was really ready to embrace the values and philosophy that these new staff brought with them. In these cases, it was easy for the new team member to get ahead of the organization and ultimately become frustrated by the pace of progress. In other cases, we've seen organizations wait to hire new staff until the ongoing transition felt "complete," only to find that they couldn't actually get there without having the new pieces in place.

Timing aside, hiring people who represent the "right" cultural fit has seemed to be even more important during these transitions. One grantee-partner radically changed its interview process: "Every new hire goes through a set of questions about how they would engage with the community to ensure that they will be an ally. Before it was inferred, but now it's explicit and in every interview." Another grantee-partner talked openly about its past missteps in hiring people "without thinking about their interests and motivations and alignment with the organization" and about how they've become much more intentional in assessing values alignment during the interview process, rather than focusing more narrowly on whether candidates have skills that match the job description. This has been particularly difficult for some when it comes to development positions; finding candidates who have both experience building strong individual giving programs and are passionate about the engagement-focused ethos that the grantee-partners are working toward has been a challenge.

These questions of cultural fit extend to the process of selecting partners, contractors, and other part-time staff too; for instance, organizations that rely heavily on teaching artists to implement engagement-focused programming have had to be very deliberate about seeking out artists whose values are in synch with the programmatic spirit that the organization is trying to cultivate. Similarly, presenting organizations are thinking about engagement values when selecting artists to present, and are offering new kinds of support to their artists to help them incorporate engagement values into their work. One told us that the organization is "being specific that [engagement] is as important as the concert, this is the thing you're providing. There's an Irvine article on engagement that we send out. We tell them 'this is what's been successful,' then have lots of conversations about how they're doing it."

Of course, at times, questions of cultural fit during hiring or artist selection processes strike at the tension between what the organization needs and how candidates have been trained. One group noted that in the process of hiring a new curator, they encountered one who “was very creative and strong in contemporary art — but also in the traditional mode of what it means to be a curator. That caused us to confront our values: What do you do when there’s work that’s objectively good, but not aligned with our values?” Others are directly confronting this tension during their hiring processes, for instance by articulating different needs in job descriptions and/or trying to work with the training institutions in their fields to expand the vision for what an emerging candidate needs to be successful. Another museum told us, “We have to be clear in job descriptions that there are certain traditional things that are not part of this model. We’re working with museum schools to change the model, but if the model of curatorial training really isn’t changing yet, we have to look under other rocks.”

Investing in professional development opportunities has helped give both new and long-time staff the tools necessary to move the work forward. Cultural competency training has been a particular area of professional development focus for many of the grantee-partners. The Irvine-supported NCAF learning community has

Investing in professional development opportunities has helped give both new and long-time staff the tools necessary to move the work forward.

NCAF participant profile



Photo credit: The Music Center

The Music Center

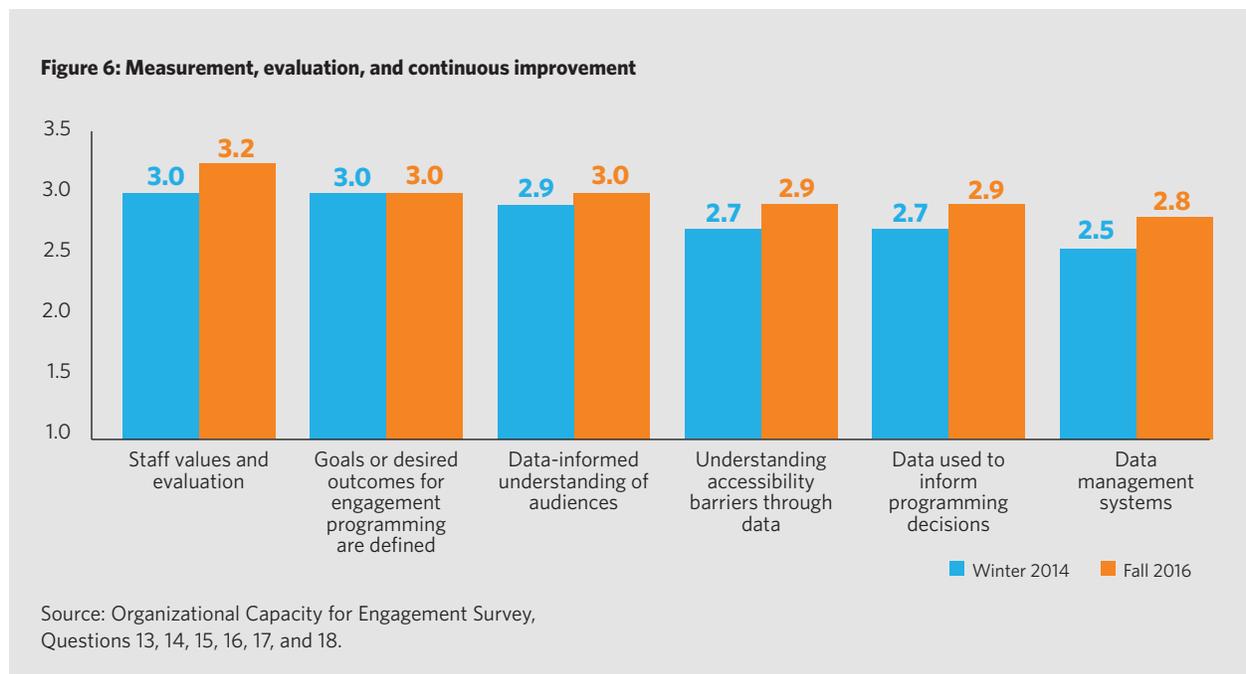
The Music Center is a Los Angeles performing arts destination and home to world-class artistic programs and events. With four iconic theaters and four renowned resident companies — Center Theatre Group, the LA Master Chorale, the LA Opera, and the LA Philharmonic — the organization is recognized for its live performance features, including Glorya Kaufman Presents Dance at The Music Center, as well as nationally recognized arts education and

participatory arts experiences. Building on its original Active Arts participatory programming, through NCAF The Music Center continued to develop relationships with community groups, particularly those that connect to new audiences in downtown Los Angeles, and to create programming as an outcome of those relationships. The organization focused on participatory programs that make use of its venues and outdoor spaces in new ways. For instance, Sleepless: The Music Center After Hours is an immersive and multisensory program that takes place late in the night and activates the venues with pop-up dance performances, opportunities for attendees to dance, DJs and live music performances, and visual arts and multimedia installations. The Music Center identified the following areas for capacity building: improving access and training on different technologies to support marketing and communications strategies; streamlining data collection and measurement capabilities through the use of technology; and increasing the number of individual donors through technology-based initiatives in a manner that would increase the organization’s understanding of trends happening in the digital fundraising world. The organization also planned to dedicate time and resources to learn about what it takes to build a 21st century board of directors.

made an invaluable contribution here; the core group meetings and other learning exchanges have provided staff members at multiple levels and in multiple departments with focused training on topics ranging from business models to evaluation to change management, as well as cultural competency. Participation in the core group meetings, in particular, has been critical to creating a shared language among staff for the change that they're going through, and for providing the core team with a confidence that the shift they're making is the right one. One said, "The NCAF cohort gives us back-up when we talk to people internally, especially those who don't see this work as being as urgent as we do."

E. Measurement, evaluation, and continuous improvement

While, as a cohort, the grantee-partners have made gains in the area of measurement and evaluation, in our view these gains have not always directly connected to the overall push to bring engagement to the core. Many have gained important, tangible evaluation skills over these three years, but there remains opportunity to apply newly-gained evaluation capacity to decisions about engagement strategies and to marshal measurement efforts toward telling compelling stories about the social impact of engagement (see Figure 6).



During the course of NCAF, many participating organizations have dramatically increased their familiarity with and use of both quantitative and qualitative measurement methods. Almost all have instituted new surveys to help them learn about participant needs, and to elicit programmatic feedback; this new stream of data has been eye-opening for many. Others have been using new qualitative tools, including focus groups and interviews, to get direct feedback from the communities that they're trying to reach. As they've become more knowledgeable and nuanced in their understanding of evaluation tools, grantee-partners also have been able to ask more sophisticated

questions about the motivations and behaviors of their participants or potential participants. In particular, many are moving toward a psychographic understanding of their audience — e.g., gathering data about the values, preferences, and behaviors of participants, in addition to their demographics.

In many cases, these new evaluation skills and processes have helped organizations improve their engagement work — either helping them to build stronger relationships with community, or enabling them to reflect on which programmatic elements are working and which could be improved. For one organization, the process of collecting data about its participants helped it to develop deeper relationships with communities and to hone its process for identifying artist-partners whose values were aligned with those of the organization. This grantee-partner used an iterative interview process to listen to and learn from its community partners, and to identify ways to make the partnership more satisfying in both directions. The organization was also able to use new insight gained from these interviews to reflect on the different risks associated with partnering with different kinds of artists, and to plan accordingly — enabling it to partner with, for instance, emerging artists, while more effectively managing the risk of doing so. One staff member said, “We’ve discerned what makes the program successful. The evaluation piece has been critical, so that we’re listening to their response in an unemotional way.”

“We’ve discerned what makes the program successful. The evaluation piece has been critical, so that we’re listening to their response in an unemotional way.” — NCAF Grantee-Partner

Nevertheless, there remains an opportunity for organizations to close the gap between evaluation data and practice, building new systems for channeling evaluation insight into decision-making. One said, “We want to focus on making decisions based on data. We’ve made forward steps on measuring and documenting, but we’re not yet utilizing it toward some particular end.” Some argue that having dedicated evaluation staff, who are deeply knowledgeable of programs, is the path forward here. One such grantee-partner said, “If evaluation and learning is important, there has to be dedicated staff to it. Ushers need to usher, artists need to art; there has to be someone whose sole responsibility is to think about evaluation. And they have to be embedded too. The evaluator needs to understand programs, to get community engagement and value it.”

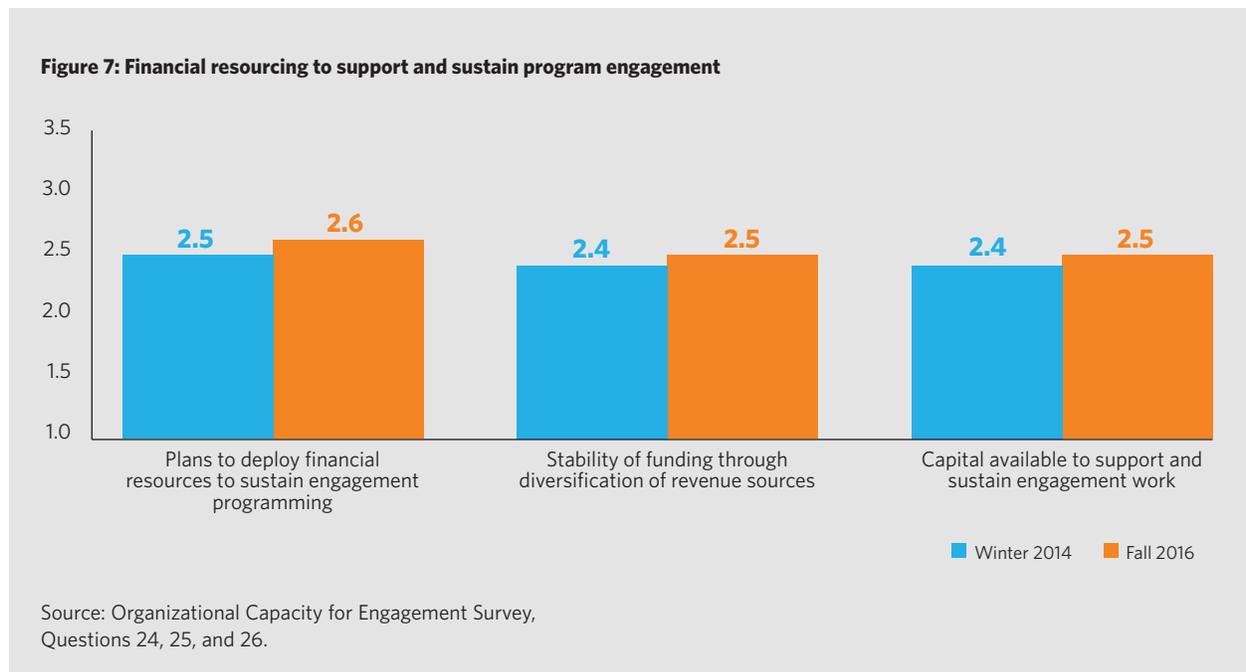
For some, an investment in evaluation has also supported the work that they’ve been doing to improve communication internally, especially across departmental silos, and to establish a shared understanding of the value of engagement work. The act of designing an evaluation program, and then digging into the results, has given team members a forum for discussing engagement work — and doing so in a way that is more concrete and tangible than they were able to manage during planning phases, where the ideas still felt abstract. Evaluation has become an area in which staff from non-engagement departments could still participate in the work and gain a better understanding of what their engagement colleagues were working on. For instance, the act of actually collecting data has required engagement staff to tap other colleagues to administer surveys at programs, giving those colleagues a specific responsibility with respect to engagement programming. For others, monthly meetings to review data became a consistent opportunity to bring together people from multiple departments to discuss NCAF in a focused way. These meetings have then also become a chance for engagement staff to discuss their goals for the programs, to engage colleagues in identifying ways to improve engagement practices, and simply to celebrate success.

Looking ahead though, evaluation practices need to evolve to include rigorous, multidimensional assessment of social impact, so that organizations have the tools necessary to tell compelling stories

about their impact — particularly to funders and potential funders. As grantee-partners begin to cultivate relationships with potential donors and institutional funders who are attracted to their community engagement work, they feel greater pressure to be able to demonstrate their value in social, not just aesthetic or economic, terms. But most feel that they haven't yet figured out how to use their existing data collection practices to do this systematically — though specific stories and quotes captured in qualitative data collection have been useful in giving staff ammunition to use when making a case about the social and community benefits of engagement programming. This remains an area in which organizations hope to grow their evaluation skills in service of their financial sustainability goals. Said one, “We’re really trying to understand the experience people are having as they’re contributing to projects or experiencing projects. We need to tell the story to funders, board members, the press, etc.”

F. Financial resourcing to support engagement

From the outset, the grantee-partners’ models for funding engagement work have been in need of additional development in order to truly make engagement sustainable — even for those that already had engagement values deeply at their core. While some progress was made in this area, it remains the domain in which organizations are weakest. They need to identify additional opportunities to financially sustain engagement programming beyond their NCAF grants, procure stable funds to resource engagement programming, and develop capital structures that enable them to make investments in their engagement programming (see Figure 7). Those that received a second round of funding from Irvine are making this a priority for the next three years.



While it's to some degree expected that organizations would have tackled getting engagement-focused programming right before moving on to financial resourcing, it's our view that the grantee-partners have been slow to fully commit to transitioning to a new resourcing model because the risks associated with leaving their current business model behind seem too great.

The risks associated with the business model can also cause the most committed leaders to question how far they're truly able to go in embracing engagement as identity. Embarking on a programmatic transition that reduces the importance of traditional programming while that programming still represents a major revenue stream for the institution can feel like a high-wire act, especially when board members are encouraging caution.

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As one museum leader said, "When you say that community engagement is the game we're in, what falls away are things that are very precious in museums. It's very difficult to talk to funders, board members, museum colleagues about why that stuff is different for us." This transition forces leaders to challenge some basic tenets about what an organization must do to be financially sustainable. For museums, developing exhibitions that can be packaged and "rented" out to other institutions has long been a revenue strategy, but exhibitions that are created with neighborhood residents are a lot less likely to be of interest to other museums. For organizations in major metropolitan areas, the tourist market has traditionally represented an important revenue stream; but a committed community engagement strategy can squeeze out efforts to market to tourists.

As previously discussed, when changes to traditional programming are disliked by long-time patrons, and especially long-time individual donors, it can be hard to commit to those changes — even when leaders and staff recognize that these very traditions are what make the community members that they're trying to engage feel unwelcome or alienated. When leaders fear that money will walk with the people who don't want their traditions disrupted, it can naturally be difficult to commit to the disruption. For at least one grantee-partner, these dynamics were much reduced because the organization was in such desperate financial straits before it began to transition to engagement: "We were already screwed, so the engagement work was a 'Hail Mary' to get out of it. For us, there's no debate about whether there's money for this because there wasn't money where we were. For us, from an individual donor perspective, selling a product about community is easier to sell than art."

In contrast, more comfortable positions led some organizations to try to maintain their core programming in its current form, more or less, to avoid disrupting the business model too much and all at once, while simultaneously starting to develop separate streams of revenue for expanded engagement-focused programming. For instance, one organization has put considerable effort toward making its flagship engagement program self-sustaining, figuring out how to charge participants or community partners for the program. At present, those funds aren't fully covering the cost of the program, but some board members have been willing to support the program in the meantime. Another has developed a dedicated "society" group for high-level donors from a specific ethnic community, whose support is explicitly connected to the engagement work that the organization is doing with that same community. Of course, this broad strategy also can be difficult to sustain from a staff capacity perspective; not only is the organization attempting to maintain its traditional programming while offering even more engagement-focused programming, but it is also developing separate funding streams for each. And even when an organization has identified a sustainable source of revenue for a particular program, that doesn't necessarily mean that the organization's business model as a whole is sustainable.

Looking ahead, many organizations are focusing their efforts in this area on cultivating new sources of individual giving, and making sure that they're not invoking exclusive practices in this one area while

striving toward inclusivity elsewhere. For example, several are asking questions about how to make a donor program compelling to new donors without relying on the kinds of exclusive benefits — black tie galas, private programmatic opportunities, etc. — that have been go-to donor perquisites in the arts for decades. They’re trying to reimagine benefits so that they offer inclusivity, or ways to foster connection among participants, rather than reinforcing norms of exclusion through their fundraising work. And as they amp up their individual donor cultivation efforts, some organizations are also grappling with a timing challenge: how to afford more development personnel before they have the development personnel to raise more funds. The Irvine funding has been helpful in addressing this challenge, providing organizations with resources to invest in new development capacity. Cultivating a culture of philanthropy throughout the organization — giving *all* staff the tools and obligation to raise funds — also has been helpful in walking this fine line.

Many organizations are focusing on cultivating new sources of individual giving, and making sure that they’re not invoking exclusive practices in this one area while striving toward inclusivity elsewhere.

NCAF participant profile



Photo credit: Yerba Buena Center for the Arts

Yerba Buena Center for the Arts

Located in downtown San Francisco, Yerba Buena Center for the Arts (YBCA) is a multidisciplinary arts institution whose work spans the realms of contemporary art, civic engagement, and public life. For YBCA, NCAF overlapped with a ground-up redefinition of the organization’s mission and vision, which are fulfilled through five interlocking platforms: the presentation of leading-edge contemporary art; the incubation of game-changing creative ideas; a commitment to inquiry; convenings that bridge people, communities, and sectors; and civic coalitions that create lasting change and policy shift. The “YBCA 100” is a signature initiative that demonstrates these platforms in action. It starts with release of the annual YBCA 100 List — the 100 people, organizations, and movements shaping the future of culture. The resulting YBCA 100 Summit brings together list makers, creative leaders, and community members for a provocative exploration of culture, politics, and equity. Each year, the Summit generates a series of questions that YBCA subsequently explores more deeply through programming, commissions, fellowships, convenings, and other activities. Past questions have included *Why citizenship?*, *What does freedom look like?*, and *Where is our public imagination?* Starting with a strategic planning initiative, YBCA refreshed and refined its mission, vision, strategy, and business model through extensive research and input from its board, staff, and community. Subsequently, YBCA used the revised strategy to clarify stakeholder roles (including board, staff, volunteers, and partners) and to increase collaboration. In addition to developing a programmatic framework centered on experiential engagement and activated participation around today’s urgent questions, YBCA created assessment strategies (both programmatic and staff focused) and increased collaboration across departments. To support these efforts, YBCA focused on augmenting its measurement skills, better utilizing data software, and learning how to make meaning out of its data.

Engaging diverse Californians

To what extent do organizations engage ethnically diverse or low-income Californians as a result of engagement-focused programming?

What engagement practices are most effective for successfully engaging ethnically diverse or low-income Californians?

In this section, we analyze the demographic data collected throughout the grant period to assess the efficacy of programmatic changes.

Who participated?

To assess how effective these strategies were in reaching ethnically diverse or low-income communities, both over time and compared to more traditional programming approaches, it would have been ideal to have collected demographic data from participants in a clear, consistent set of “engagement programs” and “traditional programs” at regular intervals over the course of the grant period. But the complexity of engagement programming in an initiative as far-reaching as NCAF means that what would be useful from an evaluation perspective was almost impossible in reality. Many organizations incorporated strategies designed to make their traditional programs more engaging, making it difficult to simply compare traditional programs and other kinds of programs. Almost all programmed adaptively throughout these three years, eliminating some programs that weren’t serving their goals well, and adding others in response to new community relationships or new understandings of their community. So tracking the evolution of any one program’s participant base over time is also challenging. That’s not to say that these approaches were problematic — adjusting traditional programming and programming adaptively are healthy, productive strategies in this context. They simply complicate our ability to tell a straightforward story about how participant demographics changed over time, or were different across well-defined program types.

Instead, we aggregate the participant data collected within three broad types of programs: (1) traditional programming, such as visitors to museum exhibitions or galleries during regular hours or ticketed attendees to performances on an organization’s mainstage; (2) onsite event-based programming, such as the social events that take place in the evening at a museum or a music and dance event in a plaza adjacent to a performing arts institution; and (3) offsite programming, or any program that occurs in community centers or partner venues. Of course, this categorization schema assumes that arts organizations have a primary venue or facility at which much of their core programming takes place — an assumption that does not fit all NCAF grantee-partners, and particularly those in the second cohort, equally well. Nevertheless, for the sake of simplicity, we apply these categories both to organizations that do have a primary venue (a majority of the 10 organizations in the first cohort) and those that do not; for those that do not have a primary venue, we’ve typically categorized their programming as “offsite.”

Key takeaways drawn from program participant data collection

While there are inherent limitations in analyzing changes in program participation due to the evolving nature of each NCAF organization's approaches, review of aggregate data indicates that:

- **Traditional programming that incorporates engagement attracted a more diverse group of participants.** Over the three-year grant period, when engagement values and practices were embedded into traditional programming, the proportion of nonwhite participants increased by 11 percentage points. The proportion of participants with household income less than \$100,000 increased by 17 percentage points.
- **Onsite event-based programs and offsite programs attracted a higher number of nonwhite and lower-income participants.** Over half of participants in onsite event-based and offsite programs are nonwhite, compared to 37 percent of participants in traditional programs. About 40 percent of participants in onsite event-based and offsite programs have a household income of less than \$50,000, compared to 24 percent of participants in traditional programs.
- **Total participation levels in onsite event-based and offsite programs increased substantially.** The overall number of people served through these offerings grew by nearly 40 percent over the three-year grant period.

In the figure that follows, we summarize the demographic composition of the overall participant base for each of these three types of programs, both in the first year of NCAF and in the final year.⁵ As a point of comparison, we also provide demographic data from the state of California as a whole; individual NCAF organizations weren't necessarily aiming to replicate the demographic diversity of the state, but we do find this a helpful comparison point for understanding whether NCAF audiences are relatively more or less diverse than the underlying population. Again, looking at the demographics of those who participated in programming is only one way of understanding how "engaging" those programs were, but these numbers provide a valuable, if directional, understanding of the potential of engagement strategies to shift persistent demographic discrepancies in who participates in nonprofit arts programming.

Figure 8: Ethnicity and income program participant data (2014 and 2016)

		NCAF organizations					
California population		Traditional programming		Onsite event-based programming		Offsite programming	
American Community Survey 2015		Year 1 2014	Year 3 2016	Year 1 2014	Year 3 2016	Year 1 2014	Year 3 2016
Race/ethnicity							
African American/ Black	6%	6%	7%	4%	4%	29%	6%
Asian/Pacific Islander	14%	5%	11%	26%	19%	18%	25%
Latinx/ Hispanic	38%	11%	9%	19%	15%	29%	35%
Native American	1%	0%	1%	2%	1%	1%	3%
White/ Caucasian	39%	74%	63%	45%	48%	11%	25%
Other	3%	5%	10%	5%	14%	12%	7%
Income							
Under \$50,000	41%	11%	24%	55%	35%	65%	43%
\$50,000 - 99,999	29%	33%	36%	26%	39%	17%	29%
\$100,000 or higher	30%	57%	40%	20%	26%	18%	28%

And in fact, in the first year of NCAF, we see that those demographic discrepancies were largely replicated among the audiences for grantee-partners’ traditional programming. In aggregate, these audiences were disproportionately white and upper income, with 74 percent identifying as white or Caucasian and 57 percent indicating an annual household income of \$100,000 or higher. By contrast, in the state of California as a whole, 39 percent of the population identifies as white non-Hispanic and 30 percent have an annual household income greater than \$100,000.

From the outset, however, these organizations were reaching a very different audience through other kinds of programming: onsite event-based programs and offsite programs engaged a considerably more diverse participant base, in terms of both ethnicity and income. Fifty-six percent⁶ of onsite

event-based program participants were nonwhite and 81 percent had an income below \$100,000 in the first year of the grant period. In other words, the participant base for onsite event-based programming among the NCAF organizations was nearly as diverse as the state as a whole.

Offsite programs reached an even more diverse audience, and one that was actually disproportionately nonwhite and lower-income compared to the state as a whole. Though we're cautious about defining "engagement programming" as any programming that is event-based or that takes place offsite, much of the programming in these two categories included the kinds of strategies and approaches that organizations were using to try to reach ethnically diverse or low-income communities. And it's worth noting that many onsite event-based programs and offsite programs are free (71 percent and 84 percent respectively), which likely makes it more compelling for new audience members to take a chance and try out a program, thereby attracting greater numbers of the demographic groups who were underrepresented in organizations' traditional programming.

These numbers suggest that these strategies worked. We can't say whether the organizations were able to form a sustained relationship with those same individuals, but it appears that, in aggregate, the grantee-partners were able to sustain a high degree of ethnic diversity in these types of programs over the grant period. Again, we encourage caution in interpreting changes over time, given that we're not necessarily looking at the same programs within an organization over time. In fact, those compositional effects — looking at a different group of programs in 2014 versus 2016 — largely account for some of the bigger swings that we see across the two years. (For instance, the large decline in the African American share of the offsite program participant base is due to one organization reporting data from a large-scale program that took place in a predominantly African American community in 2014 but not in 2016.) But in aggregate, the total number of people reached through these two types of programs appears to have increased over time, which is consistent with our observation that organizations are channeling energy and resources into strengthening the relevance and appeal of the programs that fall into these two categories and into offering even more of them. By our estimates, the total number of people served through onsite event-based programming and offsite programming grew by nearly 40 percent between the first and third years of the grant period.

Organizations are channeling energy and resources into strengthening the relevance and appeal of event-based and offsite programs and into offering more of them.

In fact, the decline in the Latinx *proportion* of the onsite event-based programming audience obscures the fact that the *number* of Latinx individuals participating in that kind of programming actually rose sevenfold between 2014 and 2016. (And while the African American proportion of the onsite event-based programming audience held steady over that period, the number of participants grew by a factor of nine.) Nevertheless, it's worth noting that Latinx communities remain underrepresented in NCAF programming on the whole, and particularly among mainstage audiences. Those who identify as Latinx or Hispanic are the fastest-growing demographic group in California and comprised 38 percent of the state's population in 2015 — but comprised only 9 percent to 11 percent of the mainstage audience at NCAF organizations. The success that offsite programs have shown in engaging Latinx individuals — the proportion of offsite programming participants who identify as Latinx grew between 2014 and 2016, and that programming type has consistently engaged the greatest proportion of Latinx individuals — may offer some preliminary lessons about how to engage Latinx communities. These programs foreground intentional efforts to build deep relationships with community members in their

local communities, often starting by establishing relationships with local Latinx artists. In other words, with Latinx communities, the notion of putting the relationship first, and then letting programming follow, may be doubly important.

Directionally, the numbers suggest that the audience for onsite event-based programming and offsite programming actually may be getting wealthier over time. (In offsite programming, the proportion of the audience that is white also rose slightly.) Again, some of this finding may be due to the fact that we are not comparing the exact same programs over time. But it also may reflect a deliberate strategy on the part of at least some grantees to build a mixed-income audience for these programs, so that there will be some natural base of philanthropic support among participants.

The data also suggest that we shouldn't dismiss the potential for more traditional programming to become more relevant to a more diverse audience. These numbers indicate that the proportion of nonwhite participants in grantee-partners' traditional programming increased by 11 percentage points, with substantial growth in the Asian audience. There was an even larger shift with respect to income, with a 17 percentage point increase in the audience share from the middle- and lower- income distributions. Again, we don't have participant data from all organizations' traditional programming in both time periods, so these comparisons are directional only. But when we drill down into the data from those organizations for which we do have consistent data, we see further evidence that traditional programming can reach a more diverse audience when engagement values and practices are embedded into it and the process for creating it. For instance, one organization invested heavily in processes to co-create core, "traditional" programs with their community members and in spending time in communities in order to extend an authentic invitation to residents to come check out its venue. The organization's numbers show an increase in the share of the nonwhite audience from 32 percent in 2014 to 39 percent in 2016.

The data suggest we shouldn't dismiss the potential for traditional programming to become more relevant to a more diverse audience.

Conclusion and implications for the field

Over the last several years, as the nonprofit arts field has grappled with declining rates of participation and tough questions about the lack of diversity — economic, racial and ethnic, and generational — among traditional arts audiences, innovative and imaginative programs have proliferated all across the country, seeking to reach new audiences and get them excited about participating in the arts. Most of these programs change the fundamental way that audiences experience art: They're social and party-like, or they blur the boundary between professional and amateur, or they provide active and enriching opportunities for audiences to go behind the scenes to learn more about the process of artistic creation, or they use art as a vehicle for participants to connect to the vital civic and social issues facing their community.

This innovation is exciting and shows the tremendous potential within the arts field to create new modes of arts engagement that can and do reach new kinds of audiences. But far too often, these programs, especially when started by large, traditional arts organizations, last for a few years and then shrink or disappear altogether. Sometimes, it's because the organization had unrealistic expectations, hoping that the audiences for these programs — enticed by the very different vibe offered in them — would quickly and easily cross over into more traditional programming. Often, it is because the funder or funders that originally supported the program begin funding elsewhere, before the organization has had a chance to, or taken the time to, figure out how to operationally and financially sustain the program without the funder's support.

This innovation is exciting and shows the tremendous potential within the arts field to create new modes of arts engagement that can and do reach new kinds of audiences.

Even these short-term efforts are valuable to the field, of course, and over the last few years, the field has benefitted tremendously from the lessons and insights that have been mined from these experiments — for example, about the programmatic attributes that lead to increased participation among communities that have typically been underrepresented. But we shouldn't overlook the risks of this approach too. When arts organizations invite their communities to a new program, or begin building new relationships with community partners, and then abruptly end those efforts when funding expires, they risk eroding the community's trust in them and further alienating themselves from the community, making it easy to dismiss them as yet another institution that fails to make a lasting commitment to people and neighborhoods too often marginalized.

So while the kind of vigorous and robust engagement work that is part of the New California Arts Fund may not be right for all arts organizations, we're encouraged by the commitment that most of these organizations have made. If the nonprofit arts field is to undergo lasting change with respect to its capacity to authentically welcome ethnically diverse or low-income communities — along with a host of other people who have felt dismissed or turned off by the formal arts — it seems critical that at least some organizations move beyond experimenting with a new kind of program here or there, and rethink the fundamental structures, processes, and human resources needed to create and sustain programming that is relevant, compelling, and essential to these communities. As the first three years of NCAF show, this kind of change isn't easy — but it is possible.

So we encourage other arts grantmakers, especially those that are committed to the long-term ability of the field to engage diverse audiences, to consider supporting organizations with multiyear change capital to make these kinds of transformations possible. And at the same time, we encourage them to amplify their support to the thousands of small, grassroots, community-based programs that do these kinds of programs day in and day out.

With this in mind, we offer the following implications for individual cultural organizations that are seeking to make engagement more central to their work and for funders in the arts field.

Implications for leaders of individual cultural organizations:

- **Be honest about whether your organization is ready to fully embrace engagement as a core approach to all programming, and consider ways to explore fit before diving in head-first.** This kind of wholesale commitment to engagement is not right for all arts nonprofits, and it's not a simple solution to reversing audience loss or overcoming financial challenges. You'll need to be prepared to interrogate current assumptions about much of what you do — from how the public is involved in the development of new work and new programs, to whose stories are told and what ideas are explored in your programming, to how your work is presented and what kind of experience surrounds it.
- **Treat “engagement” as a strategy for creating and executing programs, rather than as a discrete program, and invest in the relationship-building and listening skills necessary to do so.** The organizations that had the greatest success in NCAF emphasized that engagement begins by building relationships, rooted in shared values, with communities and community partners. Programs can then be developed out of those relationships — but developing the program and then asking communities to participate risks reducing those relationships to mere transactions. Relationship-building skills are necessary for truly inviting the community in this way, and these skills need to be cultivated as carefully as artistic vision is.
- **Think deliberately about how you'll incorporate engagement values and practices into your more traditional programming, and figure out what you're going to stop doing.** If you do commit to engagement, integrating engagement programming and traditional programming appears to be a pathway to sustainability, particularly from a staff capacity perspective. Continuing to offer traditional programming unchanged, while also building a robust engagement program, can easily stretch staff and fundraising needs beyond the breaking point. (So if you do decide to maintain both traditional and engagement programming, develop a plan for how you'll support both artistically, operationally, and with respect to marketing and fundraising support.) This will likely entail thinking carefully about the relationship between your offsite and onsite programming: Is offsite programming intended to build a relationship with communities that will translate into participation in onsite programming, or is offsite programming the locus of your engagement efforts? If the former, how do you leverage offsite programming to actively and authentically invite communities to your space? If the latter, how do onsite programs connect to your overall engagement goals?
- **Reimagine program development processes and timelines to allow for community input, audience research, and/or evaluation data to substantially and meaningfully inform programs.** While investing in new community input and measurement processes is an important first step to take, it's important that the insight that those processes provide can be metabolized into programming. Be intentional from the outset about how these new processes — and the people responsible for them — will intersect with program development processes.

- **Work to gain commitment to engagement from staff in all departments and at all levels.** A critical part of the executive's role in this kind of transformation is helping all staff members see how their work fits into a new engagement-focused mission. Without this, some staff may actively or implicitly work in ways that run counter to organizational goals. One strategy for helping staff in this way is to rewrite job descriptions so that people see, in specific detail, how their job responsibilities are changing in order to support engagement. For artistic and curatorial staff, in particular, it may be helpful to articulate a clear vision for how artistic excellence and engagement are meant to be compatible and mutually reinforcing, so that these teams don't see engagement as a threat to excellence. At the same time, it's important to recognize that the staff members in these roles are likely being asked to work in ways that are in tension with their professional training. Acknowledge that this is difficult, and support them with empathy and patience. But also be prepared to part ways with staff who continue to see engagement as less important than other goals.
- **Bear in mind that this is organizational transformation work, and expect periods of instability and higher-than-usual staff turnover.** This work will radically change your organizational culture, and it will be difficult. Be willing to reimagine what collaboration looks like, especially with respect to cross-departmental or cross-functional collaboration, as well as collaboration with community. Experiment with new models of shared, distributed leadership and communication, and be prepared for the work to change who has power in making decisions. Create the space for staff — including senior leadership — to express the very human fears and anxieties that go along with this kind of change. Find a community of fellow travelers to support your efforts and share your challenges.
- **Rethink how you hire new staff, and examine whether what you need from the people in certain positions matches the training that people in those fields typically get.** Examine your current hiring processes to make sure that you're assessing candidates' alignment with the organization's take on engagement. This may mean identifying how you intend to prioritize engagement-oriented attitudes and values relative to the experience and skills necessary for the function in the event that you can't find someone who is a star in both areas. And as you're hiring new staff, think carefully about timing: If you wait until the transition is complete before bringing new people in, you may never get there. But if you bring in people who are far ahead of the rest of the organization with respect to engagement, without proper support, they may feel stymied and impatient with the organization's pace of change.
- **Be willing to let some donors, audience members, and possibly even board members move on.** The changes that you make to programming may not appeal to all of your audience members, and some donors may be less supportive of your new vision than they were of your previous vision. But trying to hold on to them while also changing may limit your potential to achieve a bold, new vision. Have the courage to push forward even if it means letting a few audience members and donors go. But be conscientious about letting too much go too quickly, so as not to threaten the financial viability of the organization.
- **Be patient. This work takes time and will inevitably involve missteps along the way. It may never be "done."** Instead, success may look like being better equipped to learn, adapt, and change with your communities. Set expectations with your team that this is planning-intensive work and that the planning is the work — not merely the prelude to it. Cultivate staff members' comfort with ambiguity and their ability to make decisions adaptively and in uncertain conditions.

Implications for funders:

- **Be deliberate about whether you're supporting a specific program that is meant to reach a new, more diverse audience, or whether you're supporting an organization in building the capacity necessary to reach a new, more diverse audience beyond your investment.** If the former, consider opening a dialogue with grantees about their goals and aspirations for the future of the program: Is it a program that they hope to sustain beyond your funding? If so, how can they use the grant period to begin building the infrastructure necessary to sustain the program? If the latter, consider partnering with grantees to define the capacities necessary to reach new audiences, and seek out ways to accelerate transformation or capacity-building work already underway at organizations with new, engagement-driven leaders. And in either case, provide a clear definition — or range of definitions — for what you mean by “engagement,” “diversity,” or other key concepts in your grantmaking strategy.
- **Adapt program guidelines so as to support engagement as a process, rather than engagement as a narrow but more easily definable program.** This may include reimagining how you and grantees define grant “outcomes” so as to allow for programs, and their goals, to be developed adaptively out of relationships with community partners and community members. Work with your internal evaluation team and external evaluators to develop new measurement tools that are appropriate to this way of thinking about outcomes.
- **Help organizations invest in the internal infrastructure necessary to do good engagement work.** This may entail providing operating support, change capital, or risk capital, in addition to program- or project-specific support. (If so, be clear about whether the funding is operating support or some other kind of capital.) And it may also entail providing funding, as well as technical assistance or other forms of complementary support, in areas such as board development, cultural competency, and other forms of professional development, evaluation, communications and marketing, or development and fundraising — areas that are often underdeveloped in arts nonprofits, but that are critical to engagement.
- **Reimagine the funder-grantee relationship to make space for candid conversations about the challenges of this work.** This work inevitably involves missteps and backtracks, and open relationships with grantees will help ensure that those missteps become opportunities for shared learning.
- **Invest in a learning community or community of practice when funding this kind of organizational transformation process.** Let the participants' learning needs drive the content and form of that community — perhaps, even, creating structures in which grantee participants set the learning agenda, with appropriate support from learning experts — and be willing to build in substantial time for grantee staff to build relationships with each other so that they can support each other through this work.
- **Support leadership development among emerging executive and artistic leaders, particularly those of color, who are committed to this work.** This should include both the hard and soft skills of leadership. Use your position in the field to shine a spotlight on the leaders of small, grassroots organizations that are already doing stellar arts engagement work — despite being underresourced.

- **Consider collaborating with other funders to address system-wide needs in the field with respect to engagement.** In our view, collaboration is especially necessary to address persistent funding inequities that have made it difficult for the small organizations that are already deeply committed to engagement as a process, often grounded in communities of color and led by people of color, to develop the organizational structures necessary to sustain their work. Funder collaborations may also be helpful in supporting the evolution of professional standards in key functions — such as curator, collections management, and artistic director — to embrace engagement principles without sacrificing artistic excellence, and in investing in the field’s capacity to measure and assess the social impact of arts programming.

Endnotes

- ¹ AMS Planning & Research Corp, Inter-University Consortium for Political and Social Research, and DiMaggio, P. *Survey of Public Participation in the Arts, 1982-2008*. 2015. National Endowment for the Arts. Available [here](#).

Silber, B., Sibling & Associates, Triplett, T. and The Urban Institute. *A Decade of Arts Engagement: Findings from the survey of public participation in the arts, 2002-2012*. 2015. National Endowment for the Arts. Available [here](#).
- ² McCarthy, K., Jinnett, K. *A New Framework for Building Participation in the Arts*. 2005. RAND. Available [here](#).
- ³ Harder & Company Community Research. *Investing in Cultural Participation and Financial Sustainability: Cross-Cohort Analysis of the Arts Regional Initiative, 2009-2014*. 2016. The James Irvine Foundation. Available [here](#).
- ⁴ Harder & Company Community Research, and Espaldon, D. *Emerging Lessons and Implications from the Exploring Engagement Fund*. 2014. The James Irvine Foundation. Available [here](#).
- ⁵ In 2014, organizations shared data with us once, in November. Depending on when each organization got its data collection practices up and running, the data reported at that time may have included just a couple of programs' worth of data or data from several programs over several months. In 2016, the organizations shared data with us twice, in May and November; the numbers reported here aggregate across both moments of reporting.
- ⁶ Due to rounding, some of these figures sum to greater than 100 percent.

About The James Irvine Foundation

The James Irvine Foundation is a private, nonprofit grantmaking foundation dedicated to expanding opportunity for the people of California. Specifically, the Foundation is working to expand economic and political opportunity for young adults and families in California that are working but struggling with poverty. With approximately \$2.1 billion in assets, the Foundation made grants of \$83 million in 2016 for the people of California.

About Slover Linett Audience Research

Slover Linett Audience Research Inc. is a social research and evaluation firm for the cultural sector, broadly defined to include the arts, museums, public science engagement, parks and gardens, civic-minded media enterprises, and cultural funders and agencies. Based in Chicago, we help organizations grapple with strategic questions in areas spanning programming and experience design, marketing, learning outcomes, social impact, community engagement and inclusion, creative placemaking, and institutional strategy. Since 1999, we've been committed to using the tools of the social sciences to make culture more responsive, relevant, and rewarding to more kinds of people. Our clients include museums such as the Metropolitan Museum of Art, Smithsonian Institution, SFMOMA, American Museum of Natural History, Philadelphia Museum of Art, and Boston Museum of Science; arts ensembles and presenters such as Carnegie Hall, Metropolitan Opera, Los Angeles Philharmonic, Goodman Theatre, and Ballet Austin; media producers such as Slate Podcasts and Chicago Public Media; and funders of culture, community, and innovation such as the MacArthur, Knight, Annenberg, and Rockefeller foundations. More information is available at sloverlinett.com.



The **James Irvine**
Foundation

www.irvine.org

One Bush Street
Suite 800
San Francisco, CA 94104

415.777.2244

865 South Figueroa
Suite 1320
Los Angeles, CA 90017

213.236.0552