# Building Capacity for Audience Research

*Reflections on the Audience Research Collaborative*



*Photo: The Medea Project: Theater for Incarcerated Women, Artistic Director - Rhodessa Jones, Photo by Pat Mazzera, Courtesy of Cultural Odyssey*

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# Foreword

The Audience Research Collaborative (ARC) was a three-year initiative of the William and Flora Hewlett Foundation Performing Arts Program, with the goal of building grantees' capacity to better understand whom they serve. Our hope was that this information would lead to a richer dialogue about the Bay Area's changing demographics, more effective strategic planning, and stronger connections between our grantees and the increasingly diverse communities they serve.

This report takes stock of the ARC initiative for the benefit of funders who might contemplate similar capacity building programs in the future. It is not a formal evaluation, but an attempt by the project team to reflect critically on three years of work.

The Hewlett Foundation constantly seeks to strengthen its relationships with grantees and to grasp the demographic, technological and social trends that are re-shaping patterns of arts participation in the Bay Area. We approached the ARC initiative both as a funder and as a learning partner. To this end, all members of the Performing Arts Program staff were integrally involved in ARC initiative, working in close partnership with WolfBrown, our partner in this endeavor, and the individual grantees.

It all began with a simple question in 2011 as we entered a strategic planning process— *who ultimately benefits from Hewlett Foundation support?* While our grantees frequently reported on audience demographics, it was not standardized, and therefore could not be aggregated or fully understood. We launched the ARC initiative with a 12-month pilot study in 2012 involving a diverse cohort of 21 grantees selected from a pool of 56 applicants. Participating organizations received technical support in administering surveys to audience members and program participants. A core group of standardized demographic questions was mandatory. Beyond this, organizations had substantial latitude to tailor their surveys.

Based on the many lessons learned from the pilot, a full launch of the initiative rolled out in the fall of 2013. A total of 47 grantees applied to participate in the initiative, each receiving a core level of technical support from WolfBrown consultants for either 12 or 18 months depending on need. Beyond this, many received individualized training and technical support, and all were invited to participate in a learning community that included workshops, site visits and other cohort learning events. The Foundation covered the hard costs of data collection (e.g., printing, postage and data entry) and participation in the learning community, but did not offer additional financial assistance specific to ARC participation beyond the multi-year general operating support already committed. The initiative successfully concluded in December 2015.

As a place-based funder with a large and diverse portfolio of performing arts grantees, Hewlett Foundation has a long-term stake in the sector's capacity to learn, reflect critically, and adapt to changing conditions. More than anything, the ARC initiative has taught us how much we have to learn – as funders, researchers, and culture providers – about audiences, about the programs and activities that speak to diverse audiences, and about surmounting the challenges of research and capacity building.

In the spirit of candid reflection, I hope you enjoy this retrospective summary of the ARC initiative.

John McGuirk
Director, Performing Arts Program
The William and Flora Hewlett Foundation

# ARC By the Numbers

- 57 grantees applied for support
- 47 grantees were accepted and enrolled
- 41 grantees completed a 12 to 18 month program of support
- ARC grantees by discipline:
  - 8 dance organizations
  - 2 film/media organizations
  - 8 multi-disciplinary organizations (presenters and producers)
  - 16 music organizations
  - 12 theatre companies
  - 1 visual arts
- Over 250,000 audience members were asked to complete a survey, and over 50,000 did so
- 6 grantees conducted general surveys of ticket buyers, members, or program participants
- 39 grantees agreed to share demographic data with full transparency
- Two organizations conducted follow-up focus group research
- 60 people attended two webinars between February and August 2015
- 76 people attended three field trips between March and October 2015
- 31 people attended one-day workshop on qualitative methods, which included live in-depth interview and focus group demonstrations
- 90 people attended the first ARC Convening in June 2014
- 66 people attended the final ARC Convening in November 2015
- Average cost of consultant support per grantee was approx. $10,000
- Average hard cost of data collection per grantee was $2,400 (printing, postage, data entry, etc.)

# Introduction and Context

The story of the Audience Research Collaborative (ARC) began with noble intentions and ended with some successes, some failures, and many lessons learned. We will not boast of the successes nor belabor the failures except to humbly note what was learned. Our goal here – looking through the rear view mirror – is to be frank about the insight that was gained along the way.

Anyone involved in capacity building in the nonprofit arts sector is aware of the extraordinary challenges that nonprofit managers face in breaking free from their daily work to concentrate on learning new skills and sharing what they know. Yet, the vitality of the sector depends on it.

Managing nonprofit arts organizations is increasingly complex and technically demanding. Expectations for productivity have soared, while, at the same time, the skill sets necessary to produce art, sell tickets, cultivate donors and plan for the future have multiplied. This is especially true for small and mid-sized organizations, where capacity is concentrated in a handful of paid administrators or volunteer board members.



*Figure 1 – 2011 San Francisco Ethnic Dance Festival, courtesy of World Arts West*

Today's accountability environment drives nonprofits and their funders to seek out more and more data. Funders increasingly expect arts organizations to know whom they serve and to measure progress against strategic goals, especially in regards to diversity. But, who is supporting nonprofits in gathering high quality information about audiences?

A similar trend is evident within foundations. Evaluation and grant reporting requirements have intensified, fuelled by a sincere desire to be held accountable for program outcomes. As success is increasingly defined in terms of equity and access, however, funders realize that accountability hinges on grantees' abilities to accurately measure audience demographics. But, can they?

All of this raises important questions about how funders can best support performing arts organizations in their efforts to collect and interpret audience data.

The ARC initiative grew out of Hewlett's desire to better understand the landscape of audience data, to develop a scalable method for tracking audience demographics across various cultures and forms, to build grantees' capacities to gather and interpret and utilize this information, and, more broadly, to foster a culture of learning.

The reflections that follow are organized thematically, and are intended to raise as many questions as they answer.

# Research Capacity: To Build or Not to Build?

Is it necessary for all or most arts organizations to have research skills? How should funders think about building research capacity?

An organization's adaptive capacity depends on its ability to learn – its willingness to question assumptions, seek answers to difficult questions, and be vulnerable to new information. If arts organizations need adaptive capacity to be successful, then their ability to pose questions, gather data and interpret results is a core skill set.

Many arts leaders – both board and staff – are savvy consumers of research, or are genuinely motivated to gain the skills necessary to gather and interpret data. They are curious about their audiences or potential audiences, or want to know how their programs make a difference. Taking up the mantra of "data-driven decision-making," many aspire to higher levels of rigor in decision-making and internal accountability, even if their ability to do so is severely limited.

External pressures also cause arts organizations to build research capacity. More often, recipients of foundation grants are required to develop evaluation frameworks for funded projects. Grant agreements stipulate research and evaluation requirements, thrusting arts organizations into the business of research, or supervising the work of outside researchers. This can be daunting.

Despite the many internal and external pressures to conduct research in-house, opportunities for arts leaders to acquire these skills are rare. Beyond the steady stream of case studies and lengthy how-to manuals produced by funders, the ground-level work of building capacity for research – learning by doing – hasn't been a major priority until now.

Even if there is agreement on the growing importance of research to a healthy and sustainable sector, the ARC initiative raised difficult but important questions about how to build this capacity. What does success look like? Should the focus of such efforts be self-sufficiency (i.e., training staff to conduct research without professional support), or building proficiency in interpreting and utilizing research that comes from different

sources? If funders cannot be expected to provide technical assistance in perpetuity, is self-sufficiency an appropriate goal? What research skills, if any, *must* be internalized?

The ARC initiative was an ambitious experiment in capacity building. Could we train a cohort of grantees to collect audience data with confidence, using rigorous methods to develop questions and data collection strategies, and coach them on how to interpret and use the data? What would be the uptake? The roadblocks? Would grantees find this work satisfying or onerous? Would the resulting data inform their strategic plans? After 12 to 18 months of support, would they continue researching audiences without support?



*Figure 2 - Post-Performance Mail-Back Surveys were taped to theater seats prior to a performance.*

The ARC experience taught us that capacity building around research can be rewarding, although there are many challenges. There were many bright spots in terms of grantee outcomes, and some unexpected benefits. Some organizations, for example, expanded their volunteer corps as a byproduct of building capacity to administer surveys. Others gained confidence in their ability to ask better questions anchored in strategic issues, or identified gaps in service.

Obstacles to engaging in the work included staff transitions (i.e., starting over again repeatedly), lack of capacity or prioritization of the project even when participation was voluntary, silos between departments – especially between marketing and programming, and lack of ownership or buy-in at all levels of the organization.

After exiting the program, a small number of grantees continued to survey audiences on their own, while some are working with contractors. About half have no plans to continue with the research. Some of those who are not continuing say that they'll resume at a future date

> *"[ARC] set us in motion for a much richer conversation and learning. We didn't know how much we didn't know."* - Grantee Comment

after taking time to reflect and regroup, recognizing that either they have enough information for now, or cannot continue at the same depth and activity without support. Some arts organizations adopted audience research as a continuous process of assessment and engagement, while others framed it as an episodic activity (e.g., to take snapshots of the audience at intervals of every three or four years, or to address specific time-sensitive questions).

Notwithstanding the considerable challenges, we believe there is a significant upside to capacity building around research and interpretation of audience data. Not every organization experienced the kind of transformative realizations that researchers dream about, but real insights did arise from the research on a regular basis.

More than anything, we learned that building capacity for research is not a simple, solitary or short-term proposition, but a sustained, iterative and participatory learning process with different outcomes for different participants.

> *"Being part of the initiative was challenging in terms of our capacity, and it seemed that organizationally we resisted doing the work at points. In the end, we were really interested in the demographic results we got, and it was worth the push."* - Grantee Comment

Research capacity is difficult to institutionalize. Too often, research skills walk out the door when a staff member leaves for another job, so there is always going to be a need for capacity building. Some level of self-sufficiency is reasonable to expect, but it is also reasonable to think that an organization's capacity to conduct research will deteriorate over time and need re-building.

# Assessing Organizational Readiness for Research T.A.

What qualifies an arts organization to participate in a funded initiative to build capacity for audience research?

An initial online application included questions meant to discern readiness. "Why is your organization interested in participating in this initiative?" "How is audience feedback valued by various entities within your organization, such as artistic leadership, board, and administrative staff?" Additional questions asked applicants to identify specific staff who'd be involved in the project, including artistic and executive staff, emphasizing the necessity of involvement at all levels of the organization and across departments.

Grantees were provided an FAQ about the program that spelled out program requirements and expectations. Additionally, several webinars were offered as further introduction and opportunity for grantees to ask questions. Thereafter WolfBrown staff was available to grantees for one-on-one phone calls to address concerns and discuss whether or not it made sense to participate. In sum, more than 100 grantees from Hewlett Foundation's *Continuity and Engagement* grant program were invited to participate. Fifty-four applied, and 47 were accepted into the program. Note that six dropped out early due to capacity issues.

The onboarding of each grantee included an orientation webinar and an initial in-person meeting to review and discuss research goals. Grantees quickly revealed their level of buy-in to the project. Attendance at the initial design meeting, for example, offered an early indicator of the priority and level of commitment with which they'd approach the work; some organizations were represented by staff leaders across departments (or even a board member) while others were represented by a lone staff member.



*Figure 3: Santa Cruz Museum of Art and History staff conducting intercept survey*

The six organizations that dropped out of the program within the first few months did so because they either lost their key champion for the project due to a change in staffing, re-assessed their priorities and determined that the ARC was no longer a good fit, or were forced to withdraw because of an organizational emergency that precluded their ability to participate or utilize the research.

With the benefit of hindsight, the following factors seemed to predict successful uptake on research T.A.:

- **Committed leadership** – the extent to which artistic and executive leaders were staked in the organization's successful completion of the program;

- **Cross-departmental participation** – the breadth of likely involvement across the organization, from "the board to the box office";

- **Clear ownership of the process** – the project was assigned to an individual motivated to drive success with data collection and inspire organization-wide engagement with the results;

- **Openness to thinking differently** – the likelihood, however difficult to discern, that the organization would embrace data that challenges or contradicts assumptions;

- **Good research questions** – evidence of clear thinking about research questions revolving around issues of strategic importance to the organization;

- **Board involvement** – for smaller organizations, indications of strong board support and direct involvement of board members.

Financial and staffing constraints often held back organizations from fully engaging with the research. Would an additional financial incentive of, perhaps, $5,000 or $10,000 have helped secure their commitment to the work? Or, is it sufficient for a funder to

underwrite just the costs of the research work and expect grantees to allocate staff time? Would grantees have more skin the game if they received funds specifically tied to the program, or would such funding only decrease the likelihood of sustainable practice after exiting the program? There are good arguments for both sides of this question.

Overall, an organization's ability and willingness to learn and adapt as a result of new information was the key to success. An organizational culture characterized by inquisitiveness and open-mindedness, especially among leaders, was the most important indicator of readiness and capacity to participate successfully in research. Yet, at times, this was the hardest quality to identify in advance.

In retrospect, we could've been more thorough with "onboarding" grantees. Ideally, the process would've started with a series of research workshops and exercises to build fluency in the language and practice of audience research, and particularly how to define good research questions and build buy-in across departments. Then, an initial phase of small-scale research projects would have provided an opportunity to see the arts groups in action prior to admitting them into a more extended program. Resource materials should've conveyed a clearer sense of the likely level of effort, a clearer statement of the funder's purpose for funding the initiative and desired outcomes, and concrete examples of what success looks like. Follow the introductory phase, organizations wishing to continue would then participate in individual consultations to define research questions and map out a multi-year program of research and learning.

# Establishing a Community of Practice

A key lesson from the 2012 pilot study was the need to value grantees' considerable knowledge of audiences and figure a way of transferring this knowledge across organizations. Peer-led cohort learning, therefore, was a key design element of the ARC initiative. If anything, we under-estimated the valued of peer-based learning and the impact of both facilitated and informal peer exchanges. According to grantees, these were some of the most impactful learning experiences of the entire initiative.

> *"I really enjoyed speaking to other organizations and commiserating with each other. [These moments are] great for realizing that the challenges aren't going to be remedied so quickly and we all have to work together."* – Grantee Comment

The first year of ARC was an experiment in how best to facilitate peer learning using an informal and completely grantee-led process. In this phase, grantees self-selected into "learning circles" defined by topic. Each learning circle was co-facilitated by two representatives of ARC grantee organizations.

*Figure 4: Grantees interviewing one another in small groups about their ARC expectations and experience, 2014 ARC Convening in Oakland, California*

Success with this approach was limited. The time commitment was excessive, especially for facilitators. The topics, which had been crowdsourced from the grantees, were overly broad for some and overly specific for others. Grantee feedback highlighted the need for greater structure and focus, as well as a desire for occasional "expert voices" to provide context and field-wide perspective.

The greatest obstacles to engagement in peer learning activities were lack of time and lack of interest. Grantees' opted in to the activities based on their interest in the topic and on their time availability, which was highly variable and often unpredictable. As one grantee lamented: "*People just can't really commit unless they are getting something out of it and we are too busy and under-resourced to really participate in co-learning with people from other organizations.*"

Given the grantee feedback and concerns over capacity it was clear by the end of the first year that a new and better approach to cohort learning was needed. Core assumptions were revisited. What is reasonable to expect of arts organizations in regards to cohort learning? At what point does the scope of a learning community start to feel overwhelming? What is the right mix between the expert voice and peer-exchange?

In the end, we realized that providing multiple learning opportunities at different depths was a better recipe for success. One new activity was introduced each month. For example:

- In February 2015, grantees led a webinar on making sense of audience survey data;
- In June, two grantees hosted a field trip focused on challenges and strategies for developing young adult audiences, which included a live Google Hangout focus group with young tech workers;
- A final convening in November featured Dr. Manuel Pastor, professor of sociology at the University of Southern California, talking about changing demographics, and provided opportunities for peer-exchange.

Each event was unique, built from a general template interweaving the expert and practitioner voice, and incorporating facilitated and un-facilitated peer-exchange. Many ideas for cohort learning landed on the cutting room floor because there wasn't the time or the appetite to fully realize them.

As a result, participation in cohort learning activities increased, and relationships between grantees strengthened, allowing for a more fluid exchange of ideas. Among the lessons learned were:



*Figure 5: Audience Engagement Field Trip (Berkeley Repertory Theatre)*

- **Peer-exchange** is essential to successful cohort learning outcomes; while peer-exchange needs to be carefully planned and facilitated, it can also take on a life of its own without any facilitation;

- **Leave open space** within curated events for spontaneous interactions that are more social in nature, and allow for a free exchange and processing amongst grantees;

- **Facilitate sharing of data and discussion of results** amongst grantees who share common interests (e.g., a multi-disciplinary presenter who also rents its facility to other groups shared survey results with renters);

- **Identify and facilitate mentorships**, pairing senior staff with younger administrators and/or large organizations with smaller ones seeking to grow their capacity in a specific area;

- **Provide documentation** of materials, and encourage those who attended a learning activity to share what they learned with others who couldn't attend.

Much more could have been done to foster cohort learning. Well into the initiative, we realized that subgroups of four to six grantees shared similar research questions, such as how to attract more people to new artistic work, and how to assess the impact of education programs. Efforts were made to touch on these topics in a group setting. Had

additional resources been available, these subgroups of organizations could have been funded to conduct multi-site research efforts focusing on a common area of inquiry. Results could then be shared with the larger cohort. While this would require a good deal of diagnostic work up front, the potential for cohort learning would be significant.

In sum, cohort learning and peer-exchange should be woven into the fabric of any research capacity building program. Successful programs will stem from a well-defined curriculum that supports overarching learning outcomes, addresses topics of interest to a majority of participants, and values their knowledge and experience.

# Promoting a Culture of Learning

Funders considering future efforts to build the capacity of arts organizations to conduct research and evaluation should avoid defining the outcomes of such efforts solely in terms of data. Without the capacity to interpret or the will to act, collecting data is a fool's errand.

While individuals or departments within an organization can champion audience research and benefit greatly from it, an organization-wide culture of learning is necessary if research results are to permeate institutional thinking.

In many cases, the ARC initiative offered junior staff members assigned to the project an opportunity to grow professionally, and uncovered hidden talents and interests. In addition to gaining technical knowledge and experience with research methods, they gained currency in the eyes of their colleagues as facilitators of institutional learning.



Figure 6: Santa Cruz Museum of Art and History Volunteer Survey Crew

How did grantees successfully promote learning within their organization? First, by involving staff from across departments at key meetings focusing on protocol design and interpretation of results. Staff engagement ebbed and flowed depending on the capacity and commitment of specific individuals, as well as the overall level of support from leadership. To expand their capacity to collect data and interpret results, some grantees created a special "volunternship" position (i.e., an unpaid internship position), while

| Actionables | Community | Income | Political | Feasibility | Sums | Rank |
|---|---|---|---|---|---|---|
| 1.1 Using seating assignment tool in Eventbrite | 8 | 9 | 4 | 10 | 100 | 16 |
| 3.1 Increase number of events that we do that welcome other genders | 7 | 11 | 12 | 9 | 137 | 6 |
| 3.2 Increase promotion in sources that focus on other genders | 10 | 10 | 3 | 7 | 135 | 8 |
| 4.1 Classes that are culturally relevant | 6 | 8 | 13 | 8 | 186 | 1 |
| 4.2 Special events that bring the community together | 16 | 7 | 16 | 14 | 172 | 2 |
| 5.1 Promotion of free events | 5 | 1 | 10 | 13 | 170 | 3 |
| 6.1 Welcome Manual | 4 | 2 | 1 | 1 | 121 | 12 |
| 6.2 Define what it means for La Peña to have excellent service | 3 | 3 | 2 | 6 | 132 | 9 |
| 8.1 Family/friends/community social media framing | 2 | 4 | 11 | 2 | 116 | 13 |
| 9.1 Encourage ticket buyers to invite friends and family | 1 | 12 | 9 | 12 | 126 | 11 |
| 9.2 Limited "Twofer" offers | 11 | 13 | 8 | 16 | 127 | 10 |
| 10.1 Learn Google ads | 14 | 16 | 6 | 5 | 103 | 14 |
| 10.2 Build our relationship with KPFA | 9 | 6 | 15 | 11 | 151 | 4 |
| 10.3 Refigure Facebook | 13 | 5 | 14 | 4 | 103 | 15 |
| 10.4 Learn Word-of-Mouth strategies | 12 | 15 | 7 | 15 | 157 | 5 |
| 12.1 Redesign the website | 15 | 14 | 5 | 3 | 136 | 7 |

Instructions: Rank each actionable by category from 1 to 16, where 16 is most important, and 1 is least important. Do each column separate and assign a value to all the actionable without repeating the same value in a column.

*Figure 7: La Pena Cultural Center Staff Prioritization Worksheet*

others relied on board members, often out of necessity due to limited staff capacity or staff transitions.

Some of the most valuable learning occurred outside of scheduled meetings with the WolfBrown support team, when the research champions and other staff took ownership of the data. They spent time reviewing results, looking for patterns, trying to figure out what the information means for the organization and for themselves. The learning culture blossomed when this distillation of information was shared with others, and others added their own interpretations.

Most sharing of research results happened in presentations and discussions at staff and board meetings. Some grantees were quite creative in designing exercises and games to ease staff and board members into a conversation about the results. For example, one grantee designed a game called "Mythbusters" in which a staff member presents an argument or assumption the organization holds about its audience, asking others why they believe this statement to be true. Then, they'd share a finding from the research that either refutes or affirms the myth. This same grantee also had staff fill out a strategy "prioritization" sheet, asking them to rank action items that grew directly out of the audience research (Figure above). Another fun approach was to present a range of "research findings," some true and some false, and ask staff or board members to guess which ones are true, as a way of testing assumptions about the audience – and challenging some of those assumptions. These fun and interactive learning techniques were effective in engaging people in conversations they'd typically avoid or feel unqualified to have.

Of course, not everyone in an organization needs to be involved in the research. Responsibility for coordinating data collection can be delegated, but the process of

interpreting the data is necessarily a group activity if there is any hope of getting everyone on the same page in regards to operating decisions based on the research.

The technical support provided to ARC participants was specifically designed to promote independent thinking and self-sufficiency. WolfBrown supported the grantees through regular check-in calls (typically after each wave of data collection) and through in-person meetings at which grantees were asked to present key takeaways to the research team. Some organizations were quite proficient in interpreting their own data, while others required a good deal of assistance. We often had to navigate a delicate balance between the goal of guiding grantees through an organic process of reflection and grantees' instincts to short-circuit the refection process by asking us what we saw in their data. In all interactions with grantees, we strove to play the role of thought partner and provocateur, as opposed to "research expert."

*"I don't think they [the artistic directors] understood before seeing the data how competitive the market is. It helped them understand that our principal way to attract audiences is excellent programming." - Grantee Comment*

The very nature of the ARC program required that grantees pay attention to learning. Those who paid attention to the *process* of learning, as well as the data itself, were more successful in internalizing the research results either through new strategies or further inquiry.

Stepping away from their day-to-day responsibilities to reflect on audience data was a powerful experience for many grantees. These can be transformative conversations, especially for those who can't afford the time to step away and think about the larger picture.

# The Value and Challenges of Collecting Demographic Data

We began this journey with the goal of developing a rigorous and standardized approach to collecting demographic data on arts audiences so that both Hewlett and its grantees could better understand who benefits from their programs. This was driven in part by Hewlett's Performing Arts Program internal evaluation needs, and also by a genuine desire amongst program staff to help grantees focus on the changing demographics of the Bay Area.

All ARC grantees were asked to include a demographic module in their survey that mirrored the U.S. Census demographic questions. Minimum requirements included questions about gender, age, race and ethnicity, household income, educational attainment, and ZIP code. The reason for the standardization was two-fold: 1) so that

results could be aggregated across grantees; and 2) so that results could be compared directly to U.S. Census data for the Bay Area, as context for interpreting results and identifying gaps in service.

The collection of demographic data is, by its nature, sensitive, and we acknowledge that current Census Bureau taxonomies – in particular those for gender, race and ethnicity – have not kept up with the true diversity of our society. For example, there is confusion and frustration around the separation of Hispanic ethnicity from other

> **GRANTEE COMMENT**
> *"Demographic shifts have an important impact on small to mid size arts organizations who serve some of the Bay Area's most marginalized communities. They challenge us to better communicate with our community base, seek and promote new audiences at our center, and to promote equity no matter what the content we present is. It felt like a paradigm shift to recognize the unity of purpose about promoting a more equitable use of the arts coming from Hewlett and the participants in the study."*

race categories. We anticipated that grantees who serve communities defined in terms of nationality, religion or other traits not represented in the Census Bureau protocol would find the Census comparisons less helpful. In fact, some grantees were not comfortable asking some of the Census demographic questions because the answer items do not include responses that accurately reflect their community, and therefore could not be relied upon to provide an accurate representation of their community.

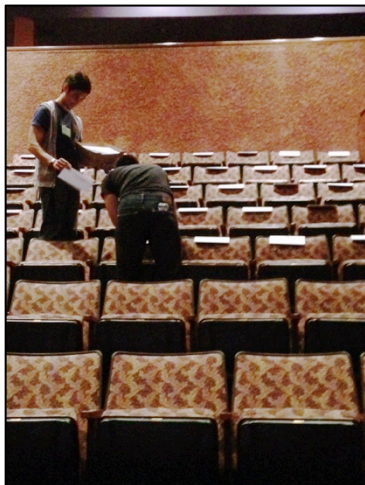Other concerns centered around asking for sensitive information such as household income. Ultimately, we decided it was valuable to collect both standardized and customized demographic information. Using the imperfect taxonomy from the U.S. Census enabled us to aggregate and compare grantee data within the cohort, provided individual grantees the ability to contextualize their audience demographics to the larger Bay Area population, and allowed for a meta-analysis comparison of the entire ARC cohort to Bay Area population in order to identify gaps of service. Some grantees chose to further customize demographic questions and characteristics in order to better reflect the identities of the communities they serve and capture a more nuanced and quantifiable picture of their audiences.



*Figure 8: Pre-setting survey packets*

Any effort to measure diversity must acknowledge that different programs can serve very different audiences. An organization's main stage concerts or performances may attract one audience, while its education and community engagement programs may serve markedly different audiences. During the pilot phase, we investigated and tested methods of gathering data on education program participants, knowing that heightened levels of

demographic diversity would be reflected in the audiences for youth programs, especially. While some methods showed promise, such as inferring demographics from publicly available school data, or surveying parents of young musicians or dancers enrolled in classes, there are many challenges in terms of accuracy and coverage. Even if one were to surmount these challenges, larger questions persist as to how to combine and weight data on education program participants with data on audiences for core programs to arrive at an overall measure of an organization's audience diversity.

There are barriers and limitations to collecting demographic information that we have only begun to identify and understand. In some cases, data collection was simply not possible. For example, surveying audiences for concerts in certain religious centers would be disrespectful and disturbing. In other instances, audience members may be hesitant to record any personal information for fear of possible identification (e.g., undocumented immigrants). More exploration is needed to uncover barriers to taking surveys, and to identify strategies to overcome them.

Nonetheless, collecting demographic information on audiences is an important and increasingly necessary exercise. Although the process can be messy and the data imperfect, it is generally useful in understanding who is served by public programs, where gaps in service exist, and in setting goals and measuring progress on audience diversity. Several ARC organizations serving culturally-specific communities were especially forward-thinking about collecting demographic data collection. *"We want the Foundation to succeed in its efforts to understand diversity/equity and use that information to serve more organizations and more communities."*



*Figure 9: Santa Cruz Museum of Art and History Survey Intercept Station*

In sum, much was learned from working with ARC grantees on demographic questioning:

- Although initial discussions around collecting demographics may be uncomfortable, they are important and crucial conversations to have. It's OK to be uncomfortable and not have all the answers to challenges that may arise.
- Conversations with arts groups about sensitivities in protocol design should be approached with respect and an open mindset. All partners in this work – funders, consultants, and grantees--should consider their cultural competency and what perspectives and biases they have that would affect the conversation. Every organization is experienced with their community, with specific expertise and knowledge around identity issues.

- Each organization has different challenges and may need different designs. Some organizations will be comfortable with the Census Bureau categories, whereas others will require a more robust set of questions that delve more deeply into racial/ethnic identities, religion, language, etc. Organizations should use demographic categories that align with their own values and goals.
- There are generational differences in how audiences respond to certain questions, particularly around gender and sexual orientation (e.g., response to the word "queer" will be different for younger adults compared to older adults).
- Offering an open-ended option allows respondents to identify themselves using their own words, and may highlight categories or different approaches to asking the question.

Developing higher levels of cultural competence in audience research is particularly important given the rapidly changing demographics of the US, and California in particular. The growth rate for Latinos and for Asian/Pacific Islanders in the US between 2000 and 2010 was 43%. For African Americans, the comparable rate was 11%, but only 1% for non-Hispanic Whites. Between 2000 and 2010, the number of young Hispanics under age 18 grew by approximately 4.8 million, and the number of young Asian/Pacific Islanders increased by 800,000. In contrast, the number of young non-Hispanic Whites fell by almost 4.3 million, and the number of young African-Americans fell by 250,000. *"That is the next America, and pretty much the next California,"* according to Dr. Manuel Pastor.

By 2020, according to Dr. Pastor, the majority of young people will be people of color. *"In some ways, California is America on fast-forward."* Between 1980 and 2010, the Latino population grew from 19% of the population to 38%, with the Asian/Pacific Islander population increasing from 5% to 13%, while the African-American population decreased from 8% to 6%, and the non-Hispanic White population decreased from 67% to 40%. This trend will continue, with California becoming majority Latino by 2040 (52%).[1]

> *"When we were talking about demographics, my head was exploding. How helpful that was, how useful that information was in thinking about my organization in a more holistic way."* – Grantee Comment

Arts organizations setting out to build new audiences will need to pay close attention to demographic shifts, and consider where they fit into this discussion in terms of their current audience. *"Always look forward,"* Dr. Pastor cautioned. *"If you're serving who you are serving now, but don't know who you are serving next, you won't be sustainable in the long run."* As communities change, so do values, interests and behaviors. Arts organizations will need to understand those shifts, who to target, and how to serve

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[1] All demographic data cited in this section is sourced from a presentation by Dr. Manual Pastor at the final ARC Grantee Convening, November 10, 2015.

them both in terms of programming and in terms of marketing and engagement. *"It's about learning a new step."*

# Parting Reflections

Over the course of the ARC initiative, the Hewlett and WolfBrown teams learned a great deal about what it takes to support arts organizations in conducting audience research in a range of logistical situations and locations, and given their extraordinarily diverse capacities and audiences. Some of the things we'd do differently if given the opportunity to do it over again are offered in this final section.

1. **A More Robust Application and Assessment Process.** A rigorous process for preparing and vetting organizations before they enter a capacity building program is necessary to ensure that they are ready to learn, and that the learning will lead to institutional change.

2. **Stronger Up-Front Orientation.** An early convening of incoming grantees would have jump-started the cohort learning process and sparked relationships between grantees earlier in the process. It also would have provided an opportunity for participants to hear directly from the funder about the purpose and goals of the initiative.

3. **More Options for Research Focus, Methods, and Depth of Engagement.** ARC grantees were channeled through a consistent research design process, focusing on quantitative research as means of investigating strategic questions around audiences. Some were able to dive deeper or expand the work through an additional pool of resources allocated for support of individual grantees' specific issues on a case-by-case basis. The focus on surveys was driven by both by Hewlett's interest in collecting standardized demographic information across the cohort, as well as capacity and cost issues for both consultants and grantees.
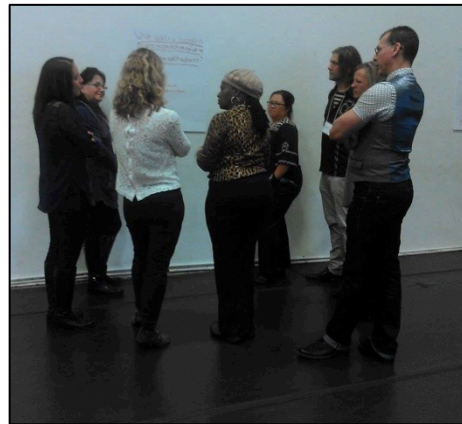


*Figure 10: Audience Engagement Panel (Berkeley Repertory Theatre)*

In future situations where collecting standardized demographic data is not a requirement, funders may offer more flexibility in program design, and multiple avenues of engagement in learning about audiences. Elements of a flexible program design might include:

a.  Cohort learning activities such as workshops, field trips, webinars and other skills building exercises designed to raise the base level of knowledge of research and evaluation methods;
b.  A knowledgeable person to call to quickly find relevant research on a particular topic – a sort of "reference librarian" for the cohort – to help avoid repeating expensive research that already exists;
c.  Access to a research "counselor" for light support of research efforts, or referrals to other resources;
d.  Complete support for audience surveys (supported survey design, data collection, and interpretation) on an episodic or continuous basis;
e.  Advanced support for more complex, in-depth studies involving multiple research methods; and
f.  Opt-in cohort studies exploring research questions of common interest to multiple organizations in a community or cohort.

4.  **Adjustable Timeframe and Ongoing Learning.** The ARC took place over the course of two and a half years. Grantees were admitted into the program in three cycles, with each cycle lasting 12 or 18 months depending on need. Those who were approved for the additional six months of support were able to re-direct research efforts and build upon previous work. The iterative process of reviewing initial audience data, revisiting and revising research questions, and adjusting data collection methods increased commitment to the process and to research in general. In other situations,



*Figure 11: Group exercise during Developing Young Adult Audiences Field Trip (Joe Goode Annex)*

not all organizations will need or want the same level of support over the same length of time. While foundation-funded capacity building programs cannot last forever, learning about audiences is, in fact, an ongoing need. Funders might think of providing organizations with periodic access to in-depth technical support and expertise, perhaps once every three years. In any case, future programs should strive to accommodate the unique needs of individual grantees.

5. **A Wider Array of Data Analysis Tools.** Many managers have some experience reviewing survey data on their own using the analysis tools found in survey software such as Survey Monkey. Others tabulate data in Excel spreadsheets. To facilitate independent review and analysis of the data, ARC grantees were provided access to WolfBrown's online dashboard reporting tool, which allows for independent review and interrogation of survey data. By and large, grantees had positive experiences with the dashboard. It provided an easy way of reviewing survey data, allowed for filtering by key variables for comparison of results by different audience segments, allowed for comparison of results across programs, and included Census data for contextualizing demographics. At the beginning of the initiative, grantees were advised that there would be a cost associated with continued use of the dashboard after they exited the program. Some chose to continue using the WolfBrown dashboard while others transferred their survey data into another tool. In future initiatives of a similar nature, we recommend supporting a wider array of reporting tools that would allow more grantees to work in a format that is affordable and familiar to them.

6. **More Emphasis on Interpretation and Analysis.** One of the most challenging but important aspects of building an organization's research capacity is transferring skills in the area of synthesis and interpretation. Many ARC grantees applied to be in the program for the primary purpose of learning how to make sense of audience data. Helping grantees interpret their data was always a priority, but some grantees needed even more time and more support than anticipated. The reflection process takes time and patience. Meaningful insights from the data sometimes don't emerge until the third time it is discussed in a group setting. Just as we recommend a more thorough intake process, we also recommend a lengthier out-take process so that grantees can have the benefit of time to reflect and share results with others.

> *"So often we ask questions that are tied to nothing; we begin our inquisition backwards. Or beginning from nothing at all. The ARC initiative has pushed my work to start at the center-- our core-- with what we need to know. My thinking process in all of my work is stronger for it. Thank you."* - Grantee Comment

In funding the ARC initiative, Hewlett banked on the likelihood that both grantees and funder would benefit from the program. For the most part, this turned out to be true. The program brought Hewlett's program officers in more familiar contact with grantees. Research results provided Hewlett staff with a platform for dialogue about institutional priorities.

ARC grantees were able to identify gaps in their provision of services, affirm and refute assumptions about audiences, justify arguments to leadership and board, and provide funders, individual donors and other stakeholders with evidence of need or impact. Success had less to do with an organization's resources (i.e., staff, budget size) and more to do with the will and commitment of participating staff and board members. Those with higher levels of commitment engaged in the

research with a sense of purpose and direction. In turn, this created a positive environment for learning and allowed for expansive thinking about how to design, conduct, and use audience research.

Of course, not all research leads to immediate action, nor should this be an expectation. The value of research lies not only in the applicability of results to identify or solve a problem, but in helping organizations learn the importance of questioning assumptions, and learn how to ask better questions.

Reflecting on the totality of the ARC initiative and the state of the field more broadly, we see a need for nonprofit arts organizations and their supporters to think more broadly about research as just one component of an organization's larger learning experience. Not every organization needs to acquire technical skills in the area of audience research in order to adapt and change, although it certainly helps. At the same time, organizations cannot thrive in a changing environment without a capacity to ask good questions, know when and where to turn for help, and interpret data.

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# Coda: Hewlett's Response to Demographic Results

The key impetus for this initiative, starting with the 2012 pilot study, was to answer the question: Which communities benefit most from Hewlett funding? It was clear that the initial 21 grantees involved in the pilot study would not serve as an accurate reflection of Hewlett's portfolio, which covers more than 100 organizations through its *Continuity and Engagement* track, which accounts for approximately 60% of the entire portfolio.

However, once we reached the end of the ARC, we revisited the question. Can we use this data to better understand who benefits from Hewlett funding, and where do gaps lie? We reviewed the *Continuity and Engagement* portfolio, and established the general distribution of grantees across six dimensions: 1) geography (i.e., county-served); 2) budget size; 3) discipline; 4) community based organizations[2]; 5) culturally specific organizations[3]; and 6) California diverse organizations[4]. It is important to note approximately 40% of current *Continuity and Engagement* grantees in the Hewlett portfolio serve or are led by historically marginalized communities.

We were then able to create a custom sample from 42 grantees across both the pilot and the ARC, approximating the general distribution across these dimensions. This sample served as a proxy for the *Continuity and Engagement* track grantees, allowing Hewlett to consider results as part of a larger mid-point assessment of Performing Arts' strategic framework.

Results are not surprising, and show several key gap areas, as evidenced by grantees in the custom cohort:

- Audiences are significantly more affluent and educated than Bay Area residents[5]. Eighty-five percent have a Bachelor's degree or higher (25 years and older), and 50% have household incomes of $100,000 or higher. In comparison, 39% of Bay Area residents have household incomes of $100,000 or higher, and 38% have a Bachelor's degree or higher.

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[2] Community-Based Organizations are defined by Hewlett Foundation as organizations whose operating model is rooted in and reflective of a historically under resourced and/or marginalized community.
[3] Culturally Specific Organizations are organizations whose artistic product is rooted in and reflective of a historically under resourced and/or marginalized discipline, form, expression or community.
[4] CA Diverse Organizations are led by and serve historically marginalized and under resourced communities, including artists and audiences.
[5] Bay Area is defined as the 11-county region: Alameda, Contra Costa, Marin, Monterey, Napa, San Francisco, San Mateo, Santa Clara, Santa Cruz, Solano, Sonoma Counties.

- Custom cohort describe a less culturally and age-diverse population, with 73% identifying as non-Hispanic white, and 60% age 55 or older. Whereas the 11-County Bay area is 63% non-Hispanic White, and only 30% 55 years or older.
- Results vary somewhat by discipline, and where the organization is located (e.g., organizations who serve Alameda and Contra Costa counties represent greater diversity).
- As expected, culturally specific, community-based and California diverse organizations serve a more diverse audience-base relative to others in the custom cohort.

In light of the Performing Arts Program's commitment to diversifying its overall portfolio, this analysis was a sobering reminder of the challenges facing the larger national landscape of funding in the arts, and, in particular, inequitable distribution of funding to those who traditionally represent underserved, culturally diverse communities. Of course, there are constraints that currently lie outside of our purview, such as funding criteria that limits who is eligible for funding. However, if our goal as funders is to serve the diverse populations of our regions, we should be conscious of these patterns and limitations as we consider our own future program strategy.

Again, we know this data again is not comprehensive, and does not reflect our larger portfolio or beneficiaries. For example, this analysis does not include grantees' participants in outreach and education programs, which target low income people and people of color. In addition, our Arts Education program is focused on creating equitable access to high quality art education for public school students and others, the majority of which are low income and people of color. The challenge of collecting data on these programs is referenced in earlier sections of this report. Although we know we that we are making inroads into serving the diversity of the Bay Area through these programs, the analysis of demographic data from the pilot and ARC work has brought to light three key reflection points:

- The Performing Arts Program is committed to diversity goals, and we are closing the demographic gaps in our grantee portfolio over time. However, with rapidly shifting Bay Area demographics, we must remain diligent in these efforts.
- Structural issues (such as minimum budget eligibility of $100,000) could likely limit our ability to reach low-income people and communities of color often served by very small budget organizations.
- Support for regranting intermediary organizations who can reach and subsequently support organizations that serve low-income people and communities of color provide the opportunity for expanding the impact of our programs, and help us to meet our strategic goals.

By sharing and reflecting on this data and the overall learning from the ARC, we hope to spark dialogue and fashion collective action to better serve the diversity of our region.

# Appendix 1: Participating Organizations

We are indebted to the following Bay Area performing arts organizations for their willingness to tackle the challenges of audience research, for the spirit of learning they embody, and for the generosity they showed in investing in each other's learning experience.

## 2012 Pilot Study Participants

A.C.T.
Cal Performances
Chitresh Das Dance Company
Cinnabar Theatre
East Bay Center for the Performing Arts
Joe Goode Dance Group
MACLA
Marin Theatre
Montalvo Arts Center
Monterey Symphony
Music@Menlo
Opera San Jose
QWOCMAP
San Francisco Ballet
San Francisco Gay Men's Chorus
San Francisco Jewish Film Festival
San Francisco Shakespeare Festival
SF Classical Voice
San Jose Jazz
Yerba Buena Gardens

## 2013-15 Audience Research Collaborative Participants

6th Street Playhouse (Santa Rosa Players)*
Alonzo King LINES Ballet
American Conservatory Theatre
Bandaloop
Berkeley Repertory Theatre
Cal Performances
Carmel Bach Festival
Center for Asian American Media
Chitresh Das Dance Company*
Cinnabar Theater

Cypress String Quartet
Dance Palace*
Dimensions Dance
Djerassi Artists Residency
East Bay Center for the Performing Arts
Golden Thread Productions
Idris Ackamoor & Cultural Odyssey (also representing African American Arts & Culture Complex, African American Shakespeare and Afro Solo)
Joe Goode Performance Group
Killing My Lobster*
La Peña Cultural Center
Magic Theatre
Marin Theatre Company
Monterey Symphony*
Music@Menlo
New Conservatory Theatre Center
Peninsula Ballet Theatre
Philharmonia Baroque*
Robert Moses' KIN
San Francisco Ballet
San Francisco Conservatory of Music
San Francisco Contemporary Music Players
San Francisco Friends of Chamber Music
San Francisco Gay Men's Chorus
San Francisco Jazz Festival (SFJAZZ)
San Francisco Jewish Film Festival
San Francisco Shakespeare Festival
San Jose Taiko
Santa Cruz Museum of Art and History
Stanford Jazz Workshop
Stern Grove Festival
The Cutting Ball Theater
The Marsh
Vallejo Symphony
Wells Fargo Center for the Performing Arts
Yerba Buena Center for the Arts
Z Space
Zawaya

*Early Exits

# Appendix 2: List of Resources Provided to Grantees

- Recruitment Website: http://hewlett.audiencefeedback.org/, includes
    - FAQ document
    - Applicant webinar
    - Link to online application

- Monograph Report on 2012 Pilot Study: *Who Participates In The Arts? Summary of a Pilot Initiative to Build Capacity for Audience Research*, 2014.

- Audience Survey Protocol Templates [note that grantees were not required to use these templates if other lines of questioning were more appropriate]
    - Pre-Performance
    - Post-Performance (including Intrinsic Impact modules)

- Qualitative Research Methods Training
    - Presentation: *Qualitative Research Training Workshop*, April 23 and July 8, 2015
    - Webinar: *Making Sense of Qualitative Data: Coding and Tagging*, August 27, 2015
    - Guide: *Introduction To Qualitative Research For Performing Arts Organizations*, 2015 (includes reference protocols and discussion guides)

- Learning Community Webinar: *Making Sense of the Data & Creating a Culture of Learning*, February 20, 2015

- Learning Community Field Trip #1: Exploring Audience Engaging Strategies, March 26, 2015
    - Agenda
    - WolfBrown Presentation: *Using Data to Engage Audiences*

- Learning Community Field Trip #2: Attracting Young Adult Audiences: Engagement & Marketing Strategies, June 4, 2015
    - Agenda
    - WolfBrown Presentation: *New Formats to Engage Young Audiences*
    - Action Planning Handout

- Learning Community Field Trip #3: Measuring Perception & Brand Quality, October 8, 2015
    - Agenda

- o WolfBrown Presentation: *Measuring Perceptions & Brand Quality*
  - o Focus Group Discussion Guide (Stakeholder Value)
  - o Action Planning Handout

- ARC Cohort-wide Convenings, July 10, 2014 and November 10, 2015
  - o Agendas
  - o Breakout session minutes (2014)
  - o Presentations (2015):
    - *How Changing Demographics are Changing the Bay Area*, Dr. Manual Pastor
    - *Your Data in Demographic Context*, WolfBrown
    - *Learnings from the Hewlett Foundation Perspective & Lessons for the Field*, Hewlett Foundation