Supporting a Thriving Bay Area Performing Arts Ecosystem

A Mid-Point Assessment of the Hewlett Foundation's Performing Arts Program

Prepared for: The William and Flora Hewlett Foundation
Prepared by: Informing Change & Olive Grove

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Olive Grove
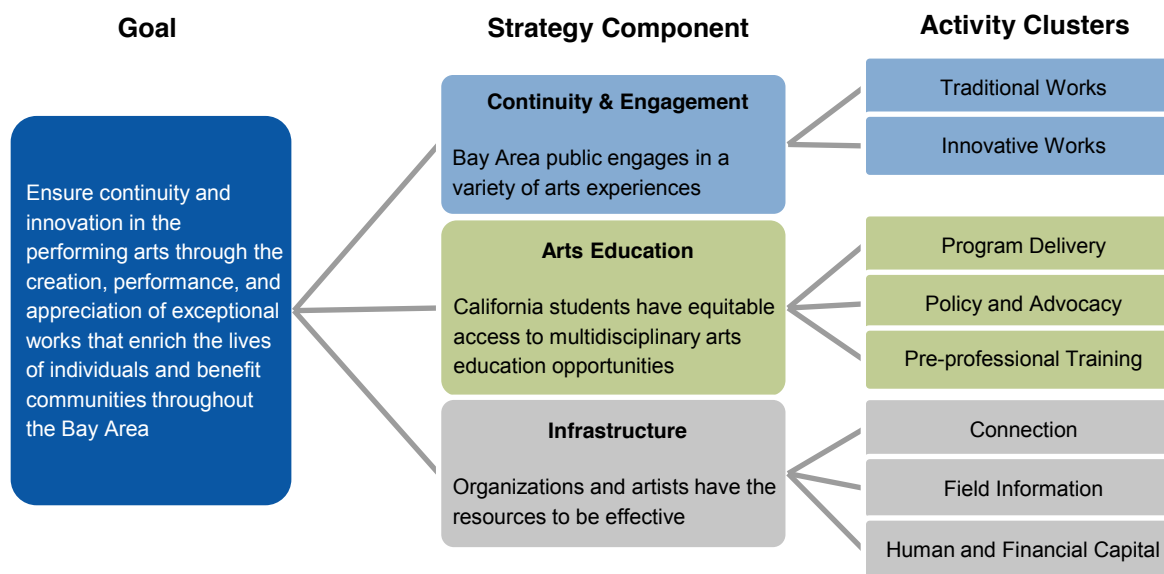INFORMING CHANGE

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INTRODUCTION

As one of the largest institutional funders of performing arts in the San Francisco Bay Area, the Hewlett Foundation's Performing Arts Program (Program) plays an important role in the arts ecosystem across California. The Performing Arts Program works to "ensure continuity and innovation in the performing arts through the creation, performance, and appreciation of exceptional works that enrich the lives of individuals and benefit communities through the Bay Area."

In 2010–11, the Performing Arts Program re-envisioned its grantmaking strategy. Facing the same challenges as many funders during the economic recession that began in 2008, the Foundation implemented a 40% cut across all program areas and grants in 2009, drastically impacting the Performing Arts Program's grantmaking dollars. The Program's Strategic Framework was developed in part to respond to these economic conditions, also taking into account the changing demographics in the San Francisco Bay Area and the shifting ways in which people participate in and experience the performing arts. The resulting Strategic Framework for 2012–17 clearly outlines the Program's priorities, its long-term commitment to the performing arts, and evolves the strategies from the previous framework. In addition to a continued priority on supporting opportunities for all individuals and communities to participate in the arts, the updated Strategic Framework prioritizes arts education as well as ensuring that there is a vibrant infrastructure available to support the arts ecosystem more broadly. It also places an increased emphasis on community-based grantees in an effort to continue to diversify the Program's portfolio.

The Program's budget, which has largely rebounded from the cuts in 2009 to approximately $18 million in 2015, is distributed across three component areas—Continuity and Engagement, Arts Education, and Infrastructure—with activity clusters within each component (Exhibit 1). The Program's grantmaking to the performing arts (music, dance, theater, opera, musical theater and film/media) focuses on 11 counties surrounding the San Francisco Bay Area. The funding is directed to nonprofit organizations with budgets of at least $100,000 with a minimum of three years of programming history.

Exhibit 1
Hewlett Performing Arts Program Components

Goal	Strategy Component	Activity Clusters
Ensure continuity and innovation in the performing arts through the creation, performance, and appreciation of exceptional works that enrich the lives of individuals and benefit communities throughout the Bay Area	**Continuity & Engagement** — Bay Area public engages in a variety of arts experiences	Traditional Works; Innovative Works
	Arts Education — California students have equitable access to multidisciplinary arts education opportunities	Program Delivery; Policy and Advocacy; Pre-professional Training
	Infrastructure — Organizations and artists have the resources to be effective	Connection; Field Information; Human and Financial Capital

Monitoring and evaluation are integral to the Strategic Framework. It outlines metrics, short (2013) and long-term (2017) growth targets, and activities and strategies for each component of the Program, taking into consideration economic conditions, the arts landscape in California and current demographic trends in the Bay Area. Program staff built in evaluation activities that would enable the Program to determine if its strategies are effective, to measure how much progress has been made toward its goals, and to identify opportunities for learning and improving outcomes.

Assessment Overview

In 2015, the Foundation partnered with Informing Change and Olive Grove to conduct a mid-point assessment of the Program's six-year Strategic Framework. The evaluation centers on four core questions, each of which has additional sub-questions (see Appendix A for a full list of the questions and sub-questions). In partnership with Program staff, Informing Change and Olive Grove developed a plan to assess these questions using a mixed-methods approach.

A primary data source for this assessment is **interviews** that solicit insight and feedback from six types of constituents: grantees from all three of the Program's component areas, peer arts funders, community-based arts leaders, and artists and cultural entrepreneurs (Appendix A includes a list of all interview informants and Appendix B provides interview protocols). The interview informant sample includes individuals and organizations connected to the Program as grantees or partners, as well as other key leaders in the arts ecosystem that do not receive funding.

> ### Core Assessment Questions
>
> 1. In light of our short and long-term goals, what have been our key accomplishments and challenges? What do we know about the main drivers—both the enablers and inhibitors for these results?
>
> 2. Which geographic and demographic communities have benefitted from Hewlett support and where do gaps lie?
>
> 3. To what degree did our original assumptions about how change would happen turn out to be true?
>
> 4. What are the shifts in the external landscape and broader Bay Area arts sector, including new research, which may call for some adaptation of the Program's core strategies, our targets for change, or how we measure progress?

This assessment also draws heavily upon **quantitative analysis** of data about the portfolio funding (i.e., GIFTS, the Foundation's grant tracking software), grantees' work (i.e., Cultural Data Project (CDP), Audience Research Collaborative (ARC) and Grantee Perception Report (GPR)), and arts education (i.e., California Department of Education (CDE)). A **review of existing literature and research studies** provided data on changes in different fields and contextual information (Appendix C provides references for all works cited).

THE SHIFTING CONTEXT FOR THE PROGRAM'S WORK

Changes Internal to the Foundation

Important context to this mid-point assessment is that there have been some key shifts at Hewlett since the Strategic Framework was created. The Foundation welcomed a new President in 2012, and close to half of the Foundation's current Board of Directors joined from 2012 on. Within the Performing Arts Program, while the Program Director and Program Associate have remained constant, there have been transitions among other staff positions, particularly due to the Foundation's term limit policy. The program officers who helped craft the Strategic Framework had relatively long tenures and deep experience at the Foundation at that time, whereas several of the current Program staff joined the Foundation only recently, bringing fresh perspectives and new ideas. Following 40% cuts from 2009–11, grantmaking budgets have been growing modestly from 2012–15, but have not approached the high water mark in 2008.

The External Environment & Its impact on the Arts Ecosystem

The fourth guiding question for this assessment focuses on understanding shifts in the external environment and arts ecosystem that have relevance for the Program's work. The contextual highlights shared below provide a backdrop to the further discussion in this report about the Program's grant portfolio and its accomplishments and challenges.

Economy

According to a number of indicators, the Bay Area has recovered from the 2008 recession. By spring 2013, the Bay Area had regained all of the jobs lost during the recession, faster than California and the United States overall. However, this economic growth has heightened income inequality between those with the highest and lowest household incomes in the Bay Area. Employment growth from 2010 through 2013 was higher in high-wage jobs than middle- and low-wage jobs; over the same time period, wage growth declined more precipitously for low-wage jobs than for middle- and high-wage jobs (Association of Bay Area Governments, 2015).

A counterpart to the economic recovery is an increase in the cost of living in the Bay Area. Minimum wage increases and rising rents and other costs escalate the overall cost of doing business in the Bay Area. A consequence for nonprofit organizations broadly and arts and culture nonprofits specifically, is organizational displacement, especially in San Francisco. As San Francisco's economy strengthens, nonprofits see their leases either not being renewed or being offered at market rate, which can be three times or more their current rents (City and County of San Francisco, 2014). These costs can force nonprofits of all sizes to close or move to a more economically-viable location. In the Bay Area, this has prompted considerable displacement for artists: 72% of artists surveyed by the San Francisco Arts Commission in 2015 reported displacement in their workspace, home or both (San Francisco Arts Commission, 2015). Artists are not the only ones being displaced; displacement of potential audience members traditionally served in San Francisco has affected organizations' program attendance and audience demographics.

The majority of sources we spoke with for this assessment, as well as the study on Hewlett's Regranting Intermediary strategy, elevated the affordability (or lack thereof) of living and working in San Francisco and the Bay Area as a key environmental factor impacting the viability of the arts sector. Artists and organizations report that they are increasingly challenged to find affordable places to live and for their art—space for rehearsals, storage, administration, and performances. As such, while the economy is deemed in recovery mode, space continues to be a very challenging and present issue and concern for the arts sector (Association of Bay Area Governments, 2015).

Population

From 2010 through 2014, the Bay Area's population grew by 270,000, reaching 7.4 million. The Bay Area counties with the largest population growth—Santa Clara County (32%) and Alameda County (23%)—also have the highest concentrations of jobs in the region.

The Bay Area is demographically diverse, and is becoming more so with each passing year. Currently, 58% of Bay Area residents are people of color, and 30% are foreign-born. Because of immigration, particularly from Asia and Latin America, the region has among the largest share of immigrants in its population nationwide. The larger counties of Alameda, San Francisco, San Mateo and Santa Clara have the greatest proportions of foreign-born residents. Consistent with national trends, the region is aging, with a growing population of people 65 years old and over (12.7% in 2013). The Bay Area's economic growth is also bringing an influx of young adults to the region. In addition, the region's youngest populations are the most diverse, which provides important context for Hewlett's work (Association of Bay Area Governments, 2015).

Where people live influences their engagement with the performing arts. People will travel farther for larger arts organizations (15.3 miles to organizations above $8 million) than small ones (10 miles to organizations below $8 million). This supports the understanding that people are willing to travel farther to the region's larger arts organizations in San Francisco. At the same time, as people travel farther distances between work and home, they have less time or are less willing to travel to experience performing arts (Sustain Arts, 2014). Also of note is that given the wide range of arts and cultural interests and expressions, various population groups in California engage in different types of art experiences and art making at varying rates. (Novak-Leonard, Reynolds, English, & Bradburn, 2015; Brown, Novak & Kitchener, 2008)

Arts Nonprofits

While the nonprofit sector overall is showing signs of recovery, stabilization and even growth from the recent economic downturn, nonprofits in under-resourced communities continue to struggle to meet demands for critical needs. Many organizations are shifting from focusing on short-term crises to exploring their longer-term viability and sustainability. For example, some arts organizations in the Bay Area are exploring opportunities for sharing back office services, finding ways to purchase or otherwise secure spaces long-term, and exploring ways to increase access for artist housing. Without a systemic solution to funding needs and sources, however, nonprofits face a challenging road ahead (Nonprofit Finance Fund, 2015).

Viability is an ongoing concern among arts nonprofits. One in five arts and cultural nonprofits in the Bay Area closed their doors between 2000 and 2010. This turnover rate is similar in other cities across the nation, and turnover is more prevalent among smaller organizations (Sustain Arts, 2014). Capitalization is a concern for many, having low levels of reserves and thin operating margins (Olive Grove Consulting & Fiscal Management Associates, 2012). General operating support from Hewlett and other funders provides much-appreciated flexibility to fund operations, which many grantees perceive as an important factor for potential stability or growth.

Emerging Trends: Technology & Cross-sector Collaborations

There are several recent trends in the arts ecosystem that are creating new opportunities in a shifting arts environment. Technology is a growing tool for engaging in the arts, for art creation, dissemination, consumption, and audience engagement (Novak-Leonard, Reynolds, English, & Bradburn, 2015). Some arts organizations interviewed expressed a desire to learn more about how to communicate and collaborate with other sectors in order to improve their ability to be more present and active in their communities and beyond, and to new audiences and stakeholders. There is a growing conversation about the potential role of for-profit, art-related businesses and whether technology-related dollars coming into the community might be available to support arts-focused businesses rather than arts nonprofits. These arts enterprises might also attract different market segments—as creators and consumers—than arts nonprofits.

Funding

The proportion of overall philanthropic support to the arts in the Bay Area (12%) is on par with the national average (Sustain Arts, 2014). However, there is not an even distribution of funding throughout the Bay Area; San Francisco County—an urban hub in the region—has a larger concentration of support.

There are growing examples of funders in the arts pooling their resources to support organizations that they deem to be critical to the Bay Area arts ecosystem, but whose livelihood is currently threatened. Peer arts funders interviewed for this assessment also say they are looking for more opportunities for cohort learning and capacity-building funding. Funders are also experiencing the impact of connecting more directly with organizations in the field, talking to grantees, and working in a less isolated way.

Leadership

Leadership is a critical issue in the arts community. As has been experienced across the nonprofit sector, the anticipated mass retirement of baby boomers from leadership positions over the past decade slowed, as leaders stayed longer in their positions due to economic and personal interests. At the same time, today's early- and mid-career leaders, who are generally more professionally trained than in earlier years, are looking for career advancement and compensation beyond what the field can likely support. Some promising arts leaders, therefore, leave the field to find more lucrative and rewarding positions elsewhere. With leaders staying longer, generational diversity in arts nonprofits can bring tensions over conflicting leadership and work styles (Hewlett Foundation, report forthcoming).

At the same time, a consequence of the Bay Area's economic growth is that local arts organizations are challenged to recruit and retain leaders with their current salary levels. Bay Area arts organizations share that when they do have transitions, their boards struggle to replace leaders given the cost of living and competitive salaries.

Arts Education

After decades of systemic disinvestment, arts education in California experienced a brief high period in 2006, when Governor Schwarzenegger allocated $105 million in ongoing and one-time funding exclusively for the arts in public schools. This initiative was short-lived. In 2009, following the start of the economic recession, 100% of those dollars were eligible to be flexed by local school districts. Districts without a strong commitment to the arts chose to use those funds where they were badly needed: to backfill cuts to their general fund resulting from state education cuts.

Following the recession, two policy shifts in public education in California took place that impacted arts education: how it is funded and how it might be taught. First, in 2013, Governor Jerry Brown fundamentally changed funding for all California public schools with the Local Control Funding Formula (LCFF). The LCFF prioritized funding for schools with high populations of "historically marginalized" students, such as English language learners and students with special needs. In addition, that funding became 100% flexible, as long as the spending contributed to better educating those students. In order to spend their LCFF dollars, each school in California must (through a community process) craft a Local Control Accountability Plan (LCAP), detailing how those dollars will be spent. Second, in the 2014–15 school year, California began rolling out the Common Core state standards, along with the Smarter Balanced Assessments to test student learning in Common Core. The Common Core, with its emphasis on critical thinking and process-based learning, was well matched to current models of arts integration teaching strategies.

Over the same time period, arts education advocates statewide pushed for change in funding and planning. First, the California Alliance for Arts Education pushed federal and state education officials to clarify the eligibility of Title I funds to support arts education programming at schools, as long as that programming directly achieves Title I outcomes. Several school districts (e.g., Los Angeles Unified School District, San Diego Unified School District) have since used Title I funds to rebuild their arts education programs as an approach toward meeting their Title I goals. Second, the Alliance and advocates at Arts for All pushed districts to develop district-wide Arts Plans, and provided coaches for that planning process. Third, advocates promoted robust inclusion of the arts in district LCAPs. All of these efforts are ongoing and hold promise for the reinstatement of arts education in public schools—both through direct sequential instruction in the four art forms (i.e., visual art, music, dance, and theater) and arts integration. It must be noted that the lack of a dance or theater credential in California remains a point of contention for advocates and a barrier to full access to sequential education in those art forms, and the current reality is that many of the state's arts education curriculum mandates for public schools remain unfulfilled by most districts.

Several interviewees described that there continues to be a significant disparity among public schools in terms of funding for arts education. In general, schools with low-income students in communities of color have far fewer dollars for education overall and, therefore, far fewer resources when it comes to arts education.

PORTFOLIO SNAPSHOT

A component of the second question guiding this assessment seeks to understand how the Program's grantmaking portfolio has evolved over time and how that compares to the San Francisco Bay Area's changing demographics. To answer this question, we analyzed portfolio data from 2012 to 2014 and compared this, when applicable, to data from 2008 to provide a reference point to the Program's grantmaking prior to the significant funding cuts mentioned earlier. In addition, to address part of the third assessment question, we compared the actual grantmaking activity against the predictions and assumptions asserted in the Strategic Framework.

Overall Grantmaking Summary[1,2]

From 2012 through 2014, the Program maintained the number of active grantees from year to year, while the number of active grants in any given year has been growing (Exhibit 2). By 2014, the total amount awarded had grown to $17.1 million (Exhibit 3). Part of the Programs' grantmaking approach over this timeframe has been to provide some grantees with more than one grant. During the economic recession, it became apparent that many grantees could benefit from additional support to address capacity limitations to help them survive the economic downturn. The Program responded by recommending more grantees for organizational effectiveness grants than it had previously. In addition, in 2014 many grantees reached their three-year renewal cycle, so they had multiple active grants in that particular year as one grant ended and a new grant began. Therefore, in 2014, 59% of grantees had multiple grants due to a combination of the grant renewal cycle and additional organizational effectiveness grants.

Exhibit 2
Total Number of Active Grants & Grantees
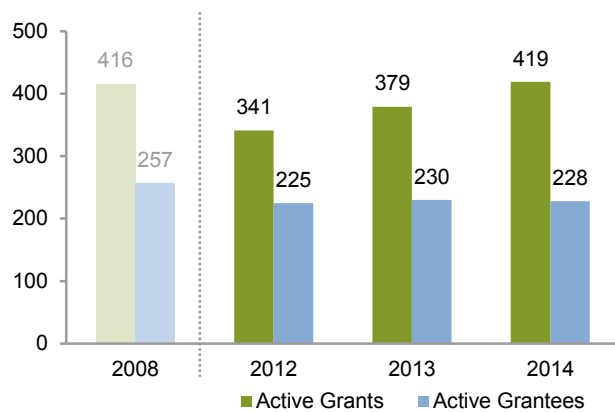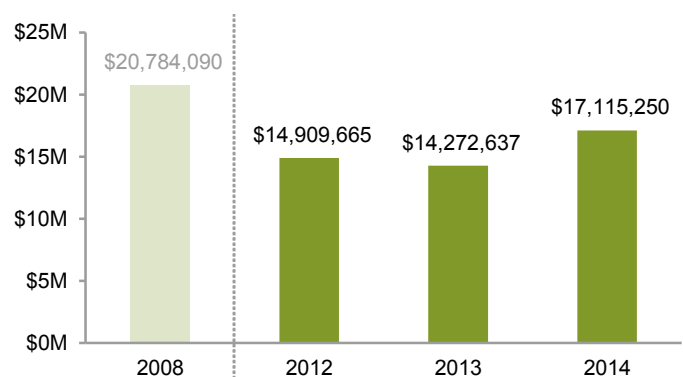Data source: Hewlett GIFTS database

Legend: ■ Active Grants   ■ Active Grantees

Exhibit 3
Total Amount Awarded
Data source: Hewlett GIFTS database

[1] Five grants were transferred from one grantee to another during the grant term. Both the "original" grantee and "transfer" grantee are included in the data, each with the proportion of the total grant award amount that they received.

[2] Three grantees are included in the data in two different ways—as a grantee through a fiscal sponsor and as a direct grantee of the Foundation—and are, therefore, counted as an active grantee twice in some years.

Grantmaking by Support Type

As mentioned previously, the Program uses a variety of grant types to meet grantees' different needs. The overwhelming majority of the Program's grants are for general operating support (Exhibit 4). Grantees, peer funders and leaders in the arts ecosystem acknowledge this as one of Hewlett's greatest strengths. It allows grantees great flexibility in using the funds to best meet their needs. The proportion of general operating support grants remained constant at around 73% of grants from 2012 to 2014, an increase from 69% in 2008. The small proportion of capital grants for endowments and venture funds has also stayed constant since 2008.

In addition to general operating grants, the Foundation offers project grants such as for a specific performance or production activities. The proportion of these grants has been declining since its peak in 2008 of 26% to 20% of grants in 2012 and 14% in 2014. In contrast, organizational effectiveness grants are on the rise, from 2% of grants in 2008 to 12% in 2014. Organizational effectiveness grants provide targeted support to help strengthen existing grantees' strategies and their leadership and organizational systems to better enable them to do their work and enhance their impact. This shift reflects Hewlett's focus on deepening its investments in existing grantees to help them become stronger, more stable organizations, a reaction to the economic recession and its effects on many arts organizations.

Exhibit 4
Percentage of Grants by Support Type, 2014
(n=419)
Data source: Hewlett GIFTS database

Grantmaking by Component Area

The majority of the Program's funding is dedicated to Continuity and Engagement grants, as it has been historically (Exhibit 5). However, the proportion of the portfolio dedicated to Continuity and Engagement in 2014—56%—is less than the Strategic Framework's projection of 64% of grantmaking dollars, suggesting that the Program is succeeding in its goals of diversifying its grantmaking portfolio. The proportion of the portfolio's funding for Arts Education—26% in 2014—decreased from 30% of grantmaking dollars in 2012, but is on par with the Strategic Framework's target of 26% of grantmaking dollars. In addition, since the portfolio has been growing, the actual amount of funding for Arts Education has remained constant at around $4.2 million. Funding for infrastructure grants, on the other hand, has increased since 2012 (with a peak of
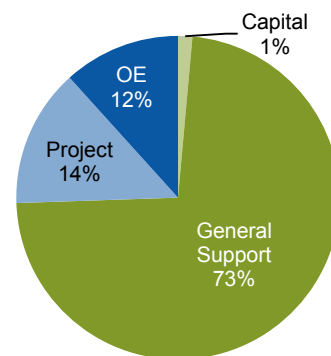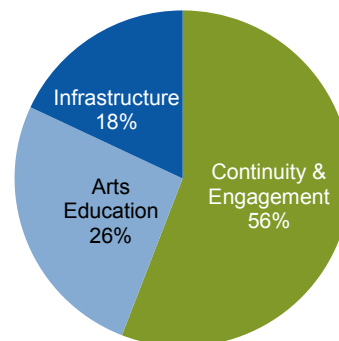
Exhibit 5
Percentage of 2014 Funding by Component Area[*]
(n=$16,427,856)
Data source: Hewlett GIFTS database

* Funding per year includes the award amount for each grant active in that year divided by number of years the grant was active. In comparison, total amount awarded in Exhibit 3 represents the full grant amount awarded in that year for each grant.

19% in 2013), exceeding the 10% target from the Strategic Framework. Increased infrastructure funding is helping the arts ecosystem overall through strengthening the supports to arts organizations and artists, including those not directly funded by the Hewlett Foundation, as well as a few large capital grants.

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[3] Funding per year includes the award amount for each grant active in that year divided by number of years the grant was active. In comparison, total amount awarded in Exhibit 3 represents the full grant amount awarded in that year for each grant.

Grantmaking by Art Discipline

The Program's grant portfolio includes grantees working across the spectrum of the performing arts and has remained relatively consistent from 2012 to 2014, varying by 2% at most for each art discipline (Exhibit 6). Multidisciplinary arts[4] received the largest proportion—almost one-third—of portfolio funding in 2014, though it had not been included in the Strategic Framework's assumptions for 2014. In comparison, multidisciplinary art received only 18% of the portfolio's funding in 2008. Hewlett's actual funding is aligned with the trend in the arts ecosystem toward more multidisciplinary approaches in the arts.

The remaining art forms fell below the 2014 projections in the Strategic Framework. This is largely due to the large percentage of funding for multidisciplinary arts, as well as grants for supporting services which accounted for 15% of the 2014 funding, but also were not included in the Strategic Framework's projections. Although on track with the projections, comparative funding for the other art disciplines follows a similar pattern to the projections, with music and opera receiving more funding than both theater and dance. Film and media received the smallest percentage of funding.

Exhibit 6
Funding by Art Discipline: Actuals vs. Projections (Targets), 2014*
(n=$16,427,856)
Data source: Hewlett GIFTS database
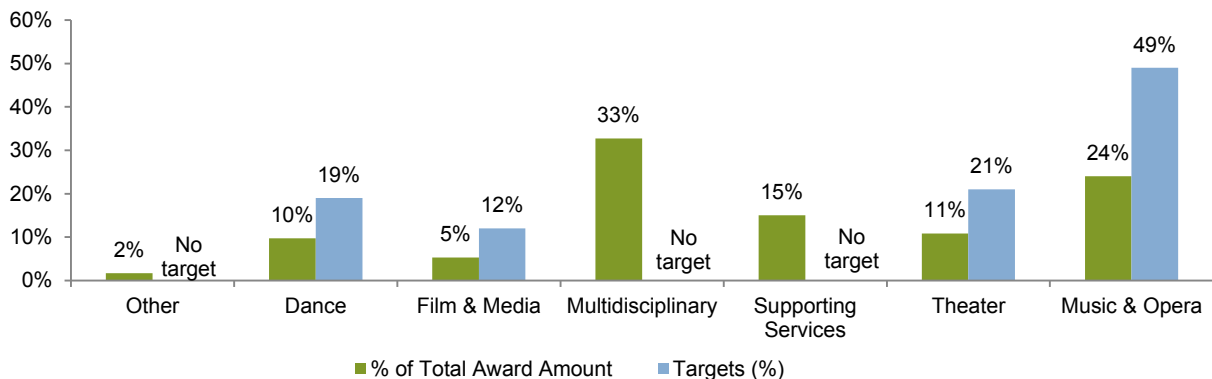
* Funding per year includes the award amount for each grant active in that year divided by number of years the grant was active. In comparison, total amount awarded in Exhibit 3 represents the full grant amount awarded in that year

Grantmaking by Geographic Area Served

The majority (87%) of the Foundation's grantmaking is directed to the 11 counties touching the San Francisco Bay area, as directed by the Strategic Framework, with 11% of funding going more broadly to California and 2% to the United States. Most of the grantmaking beyond the Bay Area is for arts education and infrastructure grantees that serve the arts ecosystem at a more macro level. In addition, 16% of funding supports grantees serving multiple counties within the Bay Area (Exhibit 7).

The Strategic Framework did not provide projections for funding outside of the specific Bay Area counties, likely leading to the funding directed to many counties falling short of projections:

- Santa Clara and San Mateo Counties combined (13% actual vs. 24% projected),
- Alameda and Contra Costa Counties combined (20% actual vs. 30% projected), and
- Marin, Sonoma, Napa, Solano, Santa Cruz, and Monterey Counties combined (9% actual vs. 21% projected).

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[4] Multidisciplinary includes all grants originally coded as multidisciplinary as well as grants coded as two or more art disciplines.

The exception is San Francisco County, which received the largest proportion of funding for a specific county—29%—slightly exceeding the projection of 25%. San Francisco serves as a cultural hub in the Bay Area, offering opportunities that likely draw people from across the region to attend or participate in the performing arts. In addition, the high concentration of arts organizations in the county requires a significant amount of infrastructure support.

Exhibit 7
Percentage of Funding by Geographic Location Served*
(n=$16,427,856)
Data source: Hewlett GIFTS database
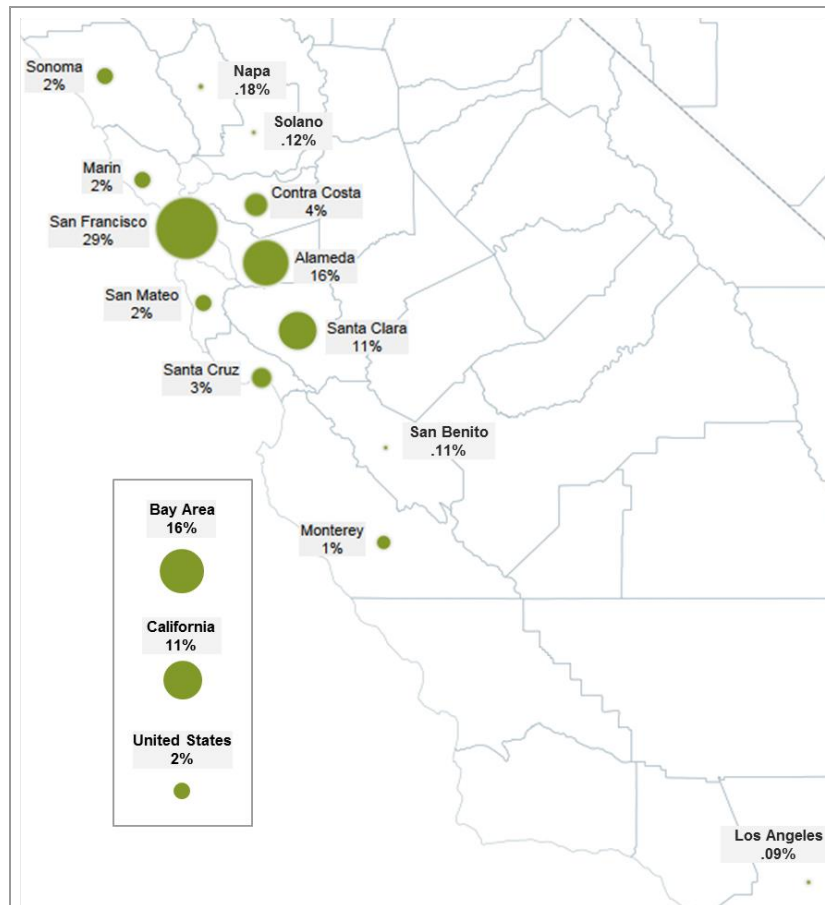
*   Funding per year includes the award amount for each grant active in that year divided by number of years the grant was active. In comparison, total amount awarded in Exhibit 3 represents the full grant amount awarded in that year for each grant.

Grantmaking for Community-Based Grantees

As a foundation, Hewlett tracks which organizations it funds that are led by and serve historically underserved communities in California, including low-income people, communities of color, LGBT, and others. This coding is referred to as "California diverse" and is used by programs across the Foundation. In addition, the Performing Arts

Definitions for "Community-Based" Grantees

1. **California diverse,** defined as *led by and serving* historically marginalized and under-resourced communities, including artists and audiences.

2. **Culturally specific,** defined as the *artistic product being rooted in and reflective of* a historically under-resourced and/or marginalized discipline, form, expression, or community.

3. **Community-based,** defined organizations whose *operating model* is rooted in and reflective of a historically under-resourced and/or marginalized community.

Program specifically recognizes that certain forms of cultural expression and organizational operating models have historically received less funding. Therefore, the Program created two additional codes to help capture this nuance in its portfolio: culturally specific and community-based grantees. These three categories are not exclusive; a grantee could be coded in one or more category.

Overall in 2014, 95 of the 228 grantees fell into at least one of these three categories—approximately 40% of the active grantees. There was considerable overlap in the types, with 38 of the 95 grantees classified as all three, and almost all (87 of 95) classified as California diverse (Exhibit 8).

As described earlier, one goal from the Strategic Framework was to place emphasis on community-based grantees who may be more "economically vulnerable." This prominence is apparent in the increases for all three types of grantees in 2012 from their pre-Strategic Framework levels (Exhibit 9). Funding to these types of grantees, however, remained fairly steady from 2012 through 2014, increasing or decreasing by only 1–2%. It may be that while the Program was able to grow the proportion of its portfolio representing these types of grantees through 2012, there may be a more limited number of additional potential grantees of these types who also meet Hewlett's overall guidelines of having organizational budgets of at least $100,000. It is also important to note that through the Program's support of regranting intermediaries, some artists and small arts organizations that serve historically underserved communities are receiving Hewlett funding but are not captured in these data.

Exhibit 8
Overlap of Grantees Targeting Diverse Communities
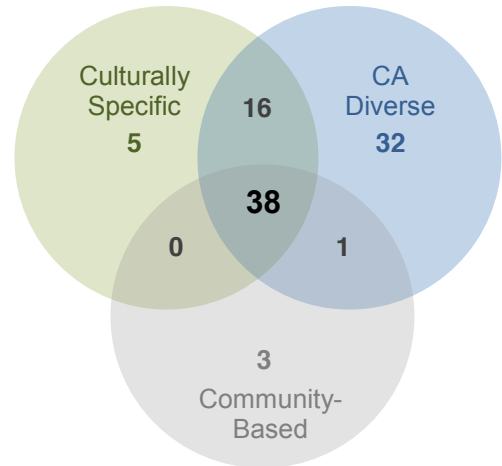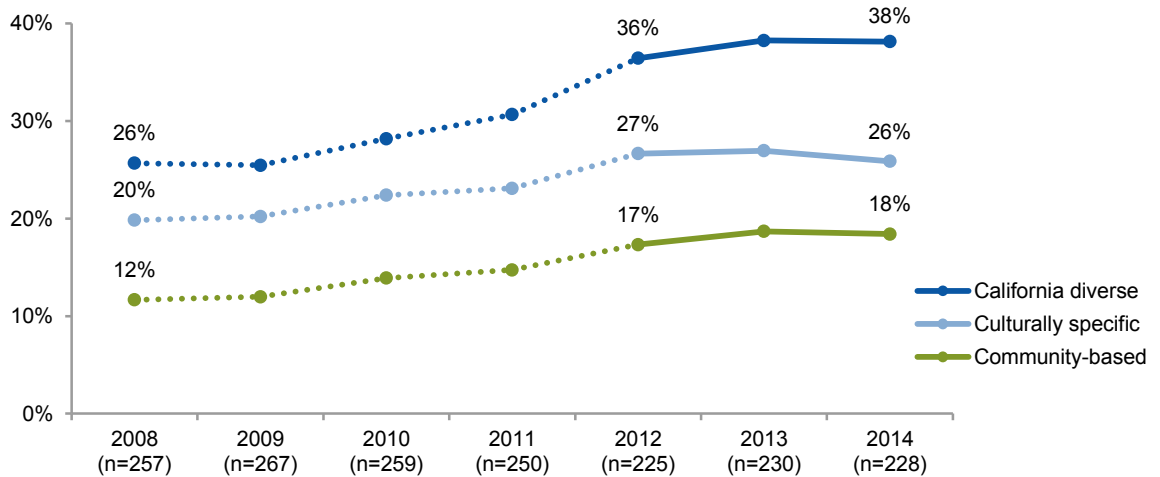Data source: Hewlett GIFTS database

Exhibit 9
Percentage of Grantees Targeting Diverse Communities
Data source: Hewlett GIFTS database

WHO'S REACHED WITH HEWLETT'S SUPPORT

The second question guiding this assessment asks which geographic and demographic communities have benefitted from Hewlett support and where the gaps are. The Audience Research Collaborative (ARC) project conducted by WolfBrown helped assess the gaps in demographic groups within Bay Area performing arts audiences. The research involved surveying audience members from a select group of Hewlett grantees to better understand their demographic backgrounds and then compared those data to population data to identify potential gaps.

It is important to point out a few issues and limitations in the methodology and sample of the ARC research presented in the highlights below. Only one-third of the Program's Continuity and Engagement grantees are included in the sample, and it does not include any Infrastructure or Arts Education grantees (note that audience is not a directly relevant question for some of these grantees). Furthermore, Continuity and Engagement grantees lead a number of outreach and education programs, which influences the demographic profile of attendees. How audiences are surveyed may also present some bias toward female, White and more highly educated individuals. Nevertheless, while the ARC data is not directly representative of Hewlett's Continuity and Engagement portfolio—nor the Program's portfolio overall—we believe it provides a useful comparison as it strongly correlates across six key dimensions of the Continuity and Engagement portfolio: geographic distribution, range of organizational budget, art discipline, and organizations categorized as California diverse, culturally specific and community-based (see p.9 for definitions of these categories).

Overall, the group of grantees participating in the ARC research serve ticket-buying audiences that, to a greater extent than the general Bay Area population, are well educated (83% have a bachelor's degree or higher), middle-to upper-income (50% have annual incomes of $100,000 or higher), non-Hispanic White (78%), female (65%), and older (60% age 55 or older) (Exhibits 10–14). Of particular note is that among racial/ethnic groups, Hispanics/Latinos and Asians are particularly underrepresented. People interviewed for this assessment corroborate these findings from their observations. They also believe there may be a gap in art forms that appeal (and are affordable) to working class audiences. Interviewees suggest that one potential driver for this trend is that the Foundation's grantees include Western art forms such as ballet, classical music and modern dance, which have historically been patronized more by middle- and upper-income White audiences than other groups. However, a large—and growing—proportion of people are attending free events offered by these types of organizations, which may potentially influence audience composition over time. Furthermore, an overall increase in participation through community-based grantees, as well as the Foundation's focus on approaches to reaching more diverse audiences, provides a promising basis for expanding the portfolio's reach to a more diverse audience.

Exhibit 10
Population & Audience Comparison by Education Level
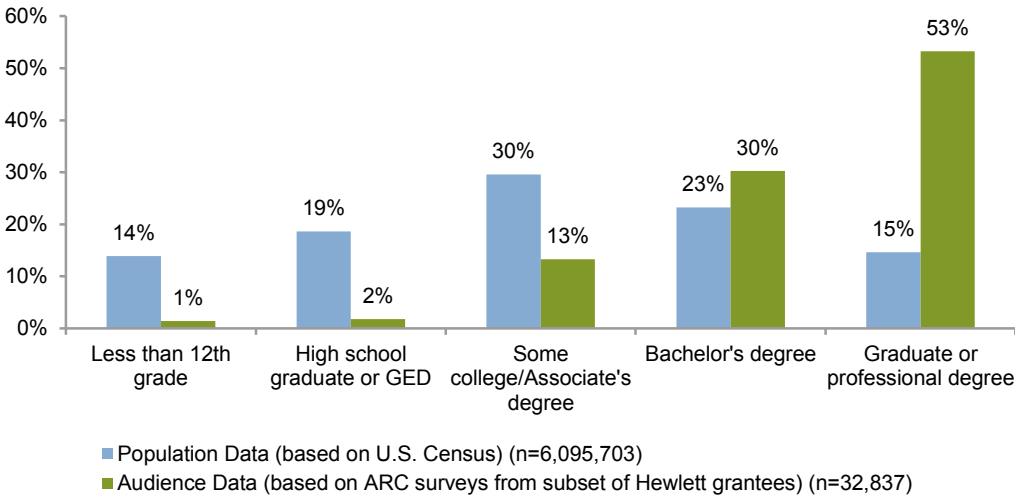Data source: ARC database

Population Data (based on U.S. Census) (n=6,095,703)
Audience Data (based on ARC surveys from subset of Hewlett grantees) (n=32,837)

Exhibit 11
Population & Audience Comparison by Income
Data source: ARC database

Population Data (based on U.S. Census) (n=2,730,795)
Audience Data (based on ARC surveys from subset of Hewlett grantees) (n=29,000)
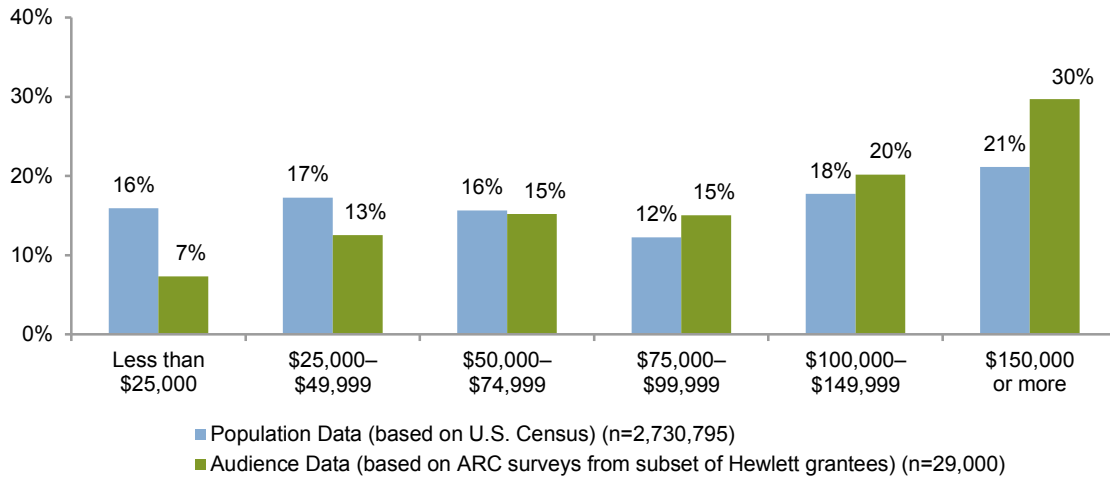
Exhibit 12
Population & Audience Comparison by Race/Ethnicity
Data source: ARC database

Population Data (based on U.S. Census) (n=7,484,607)
Audience Data (based on ARC surveys from subset of Hewlett grantees) (n=33,385)
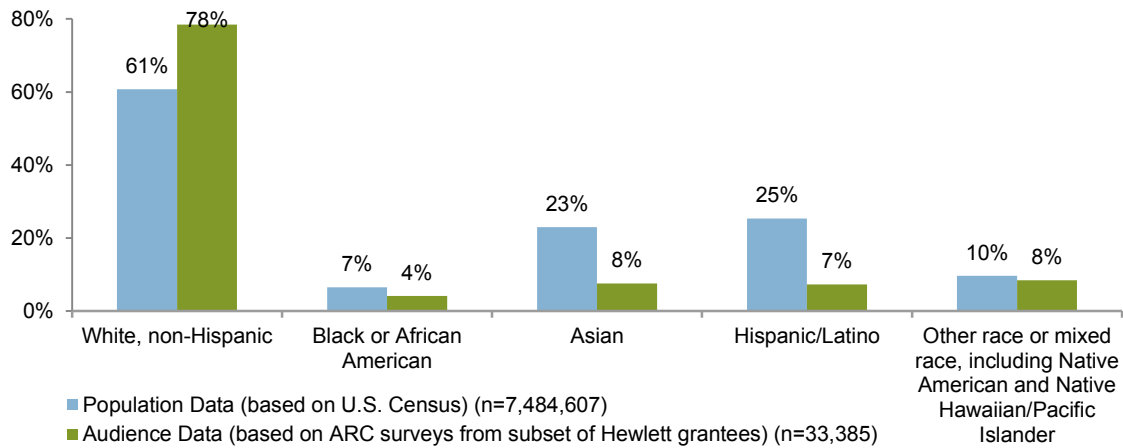
Exhibit 13
Population & Audience Comparison by Gender
Data source: ARC database

Population Data (based on U.S. Census) (n=6,095,703)
Audience Data (based on ARC surveys from subset of Hewlett grantees) (n=33,138)
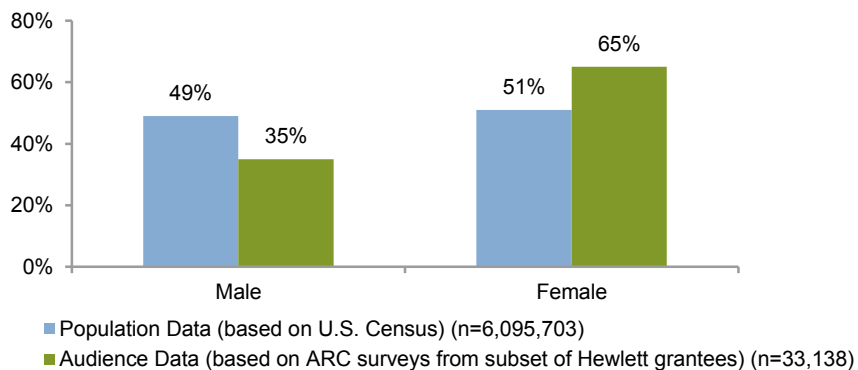
Exhibit 14
Population & Audience Comparison by Age
Data source: ARC database

Population Data (based on U.S. Census) (n=6,095,703)
Audience Data (based on ARC surveys from subset of Hewlett grantees) (n=31,824)
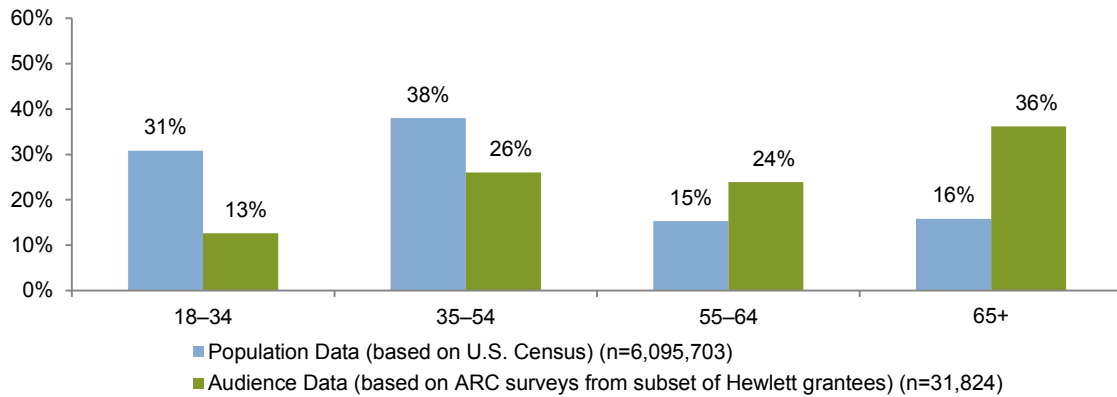
The Performing Arts Program's multi-component approach allows it to reach demographic groups that may be less served by one component through another. For example, Hewlett's Arts Education grants target a few key underserved populations by reaching youth—as well as their families—in public schools throughout the Bay Area and California more broadly, namely communities of color and lower-income families. This targeted effort is a prime example of the complementary ways in which Hewlett's various strategy areas are focused on filling the gaps within the larger arts ecosystem. Hewlett's hypothesis is that these demographic gaps will begin to shrink over time.

Overall, in respect to geography, San Francisco County stands out as being the home of a much higher percentage of the Bay Area's arts audience compared to the overall population (Exhibit 15), and San Francisco County offers a higher amount and diversity of opportunities to participate in the arts ecosystem than the other Bay Area communities. Santa Clara County, on the other hand, stands out as having a large gap between its overall population and their participation in the arts community—22% versus 8%, respectively. A significant reason for the low audience attendance in Santa Clara County is that several anchor arts organizations have recently closed or are struggling due to financial challenges. Monterey and Solano Counties also stand out has having disproportionally low resident participation in the arts and are two of the counties least supported in the current Hewlett portfolio. While this data looks at counties as a whole, it is important to keep in mind that it is not homogenous within a county and the participation in the arts may vary by community or demographic groups within it.

Exhibit 15
Population & Audience Comparison by Geography
Data source: ARC database

Population Data (based on U.S. Census) (n=6,096,164)
Audience Data (based on ARC surveys from subset of Hewlett grantees) (n=29,634)
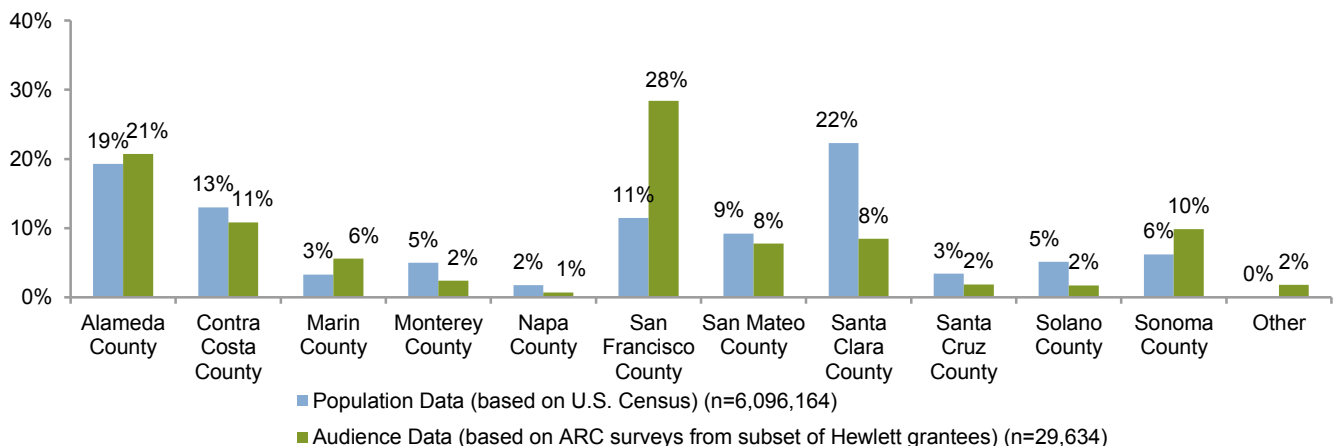
PORTFOLIO ACCOMPLISHMENTS & CHALLENGES

This section addresses the first assessment question which asks about the Program's key accomplishments and challenges, including progress toward the metrics identified in the Strategic Framework, and the enablers and inhibitors for these results. To address this question, we looked at accomplishments and challenges at three levels: across the portfolio, by each component area, and for the arts ecosystem overall. Of the findings presented below, those related to the Program's portfolio are what grantees attribute to their Hewlett funding. Across the other areas, because many measures being reviewed for this assessment rely on the grantee's work overall, Hewlett funding is contributing to these accomplishments but should not be viewed as the sole or primary source.

Across the Performing Arts Portfolio

Grantees credit the Performing Arts Program with helping them develop into stronger organizations that may not even exist without the Foundation's funding and guidance. In the 2013 Grantee Perception Report, Foundation grantees gave the Performing Arts Program very high marks (in the 90th percentile or above) in many areas, including:

- Understanding grantee challenges;
- Understanding grantees' strategies and goals;
- Helping organizations improve their ability to sustain their work;
- Helping organizations' ability to assess progress toward their organizational goals; and
- Organizational impact.

This is likely the result of the high caliber Program staff often mentioned in interviews for this assessment. Interviewees—grantees and others—praised Program staff as being knowledgeable about the field, really "getting" the grantees' work, and respecting the grantees as partners. Program staff serve as professional resources for organizations, particularly those that are new or start-up arts organizations. Interview informants

"It is not just the amount of money they have given us—there are some organizations that have given us more—but they have consistently valued the work we do rather than try to impose on us what they think we should be doing."
– Grantee

mentioned a few examples of how the Program staff came to speak to their Boards on behalf of the grantee or city officials. Although there have been transitions in Program staff in recent years, interview informants perceived the Foundation as unwavering and steady in its grantmaking approach, regardless of who the Program officers are. Many grantees commented that they do not think their organization would be what it is today (or possibly even exist today) without Hewlett's funding and guidance.

The Performing Arts Program's grantmaking approach, including the following key components, is often highlighted as the reason for its strong impact on grantees:

- **Multi-year funding** provides stabilization for organizations and time to think strategically about their work.

- **General operating support**—lauded by all grantees—provides flexibility to allocate grant funding where grantees most need it, possibly even try some riskier projects or endeavors. The funding for capital projects and succession planning allows grantees to continue and expand their work as they enter the next phase of organizational development.

- The **application process** pushes grantees to think strategically about their work, and they then use this thinking to pursue additional funds, new projects or internal growth or expansion. The logic model was specifically mentioned by grantees as a useful tool in their work.

- The Foundation's work is driven by short, medium and long-term **goals** developed through a strategic process.

- Hewlett supports some grantees with **more than one grant at a time,** which helps strengthen organizations by addressing short-term issues like fundraising, marketing, and board development in addition to general operating support grants for ongoing sustainability. One grantee described Hewlett's approach as "holistic grantmaking."

"[The Hewlett] logo is not just a sign of support, but it becomes a badge of honor for the people who receive it."
– Grantee and Community-based Arts Leader

Several grantees mentioned that once they received the Hewlett "stamp of approval," other organizations and individuals came on board with funding, greatly contributing to their organization's growth and sustainability. Hewlett support signifies to others that the organization offers high quality arts programs, which grantees take great pride in. This interpretation of the Hewlett "stamp of approval" seems to be the result of the Foundation's perceived knowledge and expertise in the performing arts field; their vetting or application process which requires grantees to think strategically about their work; and their commitment to supporting grantees through grants for organizational capacity growth and development (e.g., capitalization projects, succession planning), and the professional development and coaching many grantees described receiving from Hewlett staff.

Interviewees also identified a few challenges with the Program's grantmaking. They felt that the application process—particularly the need to develop a logic model—was a possible challenge for potential new grantees, especially for smaller organizations and those that are run by artists who may not be sophisticated grant seekers.

Continuity & Engagement

The Strategic Framework identifies five cluster metrics as well as an aggregate metric for assessing the Program's progress in its Continuity and Engagement grantmaking (Exhibit 16). Many of these metrics are based on CDP data for attendance in Continuity and Engagement grantees' performances and events as well as their classes and workshops. The aggregate metric—total participation in grantees' performing arts activities—includes all total attendance data (i.e., both performances and events as well as classes and workshops). For all of the metrics, the Continuity and Engagement grantees have far exceeded even the long-term targets, suggesting a possible need to revisit the targets to continue monitoring progress.

Exhibit 16
Continuity & Engagement Metrics

	Short-Term Target (2013)	Mid-Point Assessment	Long-Term Target (2017)
Aggregate Metric			
• Total participation in grantees' performing arts activities (Exhibit 17)	No change	+33%	+1%
Activity Cluster Metrics			
• Paid and free attendance at grantee events/performances (Exhibit 18)	No change	+33%	+1%
• Participation in education and outreach programs through grantees (Exhibit 19)	No change	+37%	+2%
• Participation in programs through community-based grantees (Exhibits 21)	+2%	+58% to 73%	+5%
• Participation gap between demographic groups[5] (Exhibits 10–15)	TBD	Not applicable – data from one time point to date	TBD
• Website visits and social media contacts (Exhibit 23)	+1%	+16%	+10%

From 2011 to 2014, total participation in grantees' performing arts activities, including performance, events, workshops and classes, grew by 33% from 10.3 million to 13.7 million (Exhibit 17). In most years, the balance between virtual and physical (or in-person) activities was roughly half, except in 2013 when four grantees reported significant increases in virtual participation resulting in the peak of 18.6 million participants that year. It is difficult to attribute participation specifically to Hewlett grants because much of this funding is not program or project specific. Rather than citing accomplishments due specifically to the Foundation's funding, many grantees described the fact that they are even able to exist and operate at the levels they do as the result of the Foundation's funding.

Overall participation is mainly through grantees' performances and events (Exhibit 18). These trends drive the trends in total participation, with a 33% growth from 2011 to 2014 and the same spike in 2013 due to the same four grantees. The majority of people attend free performances and events, which is part of the strategy for reaching new and more diverse audiences. While a much smaller component of total participation, attendance in grantees' classes and workshops increased by 37% since 2011 and has remained steady since 2012 (Exhibit 19).

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[5] Data on this metric is included in the section of the report: Who's reached with Hewlett's support.

Exhibit 17
Total Participation in Continuity & Engagement Grantees' Performing Arts Activities*†
Data source: CDP database
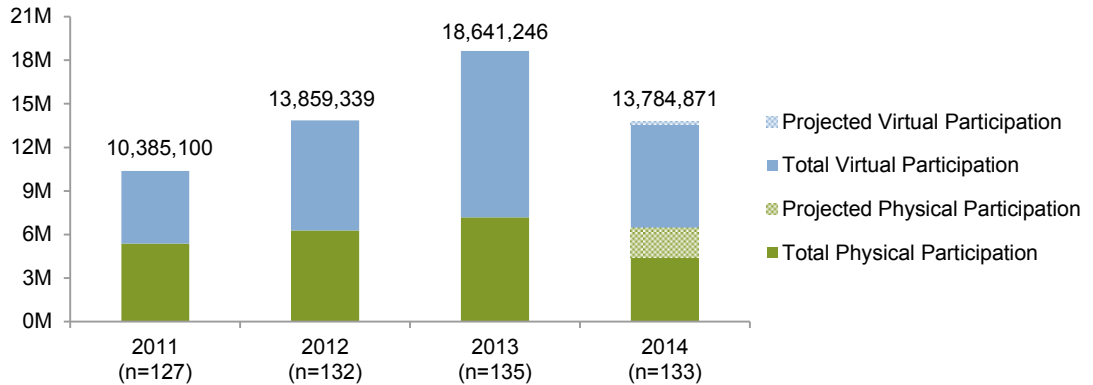
* All "projected" values in this section are based on the 2013 CDP data for those grantees that were active grantees in 2014 but have not yet reported data for this year. Where projected data is noted and included in the analysis, the Ns and the total amounts are equal to the sum of the current and projected amounts.

† Total participation in grantees' performing arts activities includes total paid and free attendance at grantee events/performances as well as total participation in grantees' classes and workshops.

Exhibit 18
Total Participation at Continuity & Engagement Grantees' Performances or Events
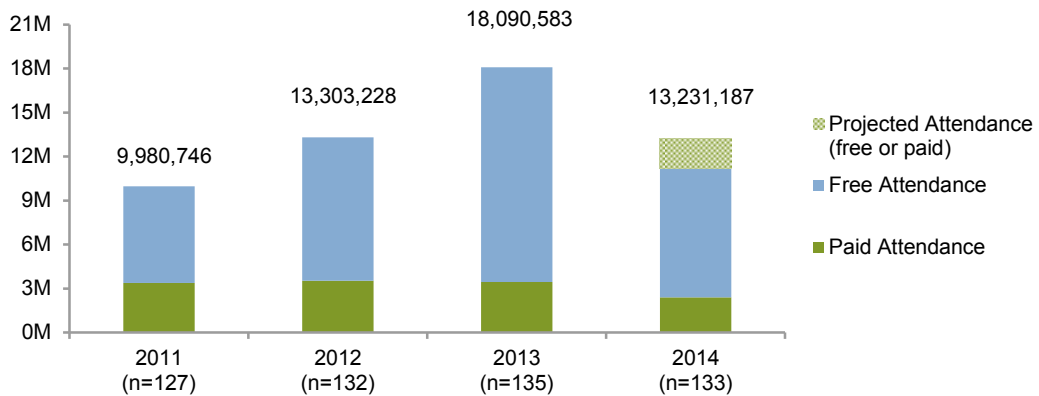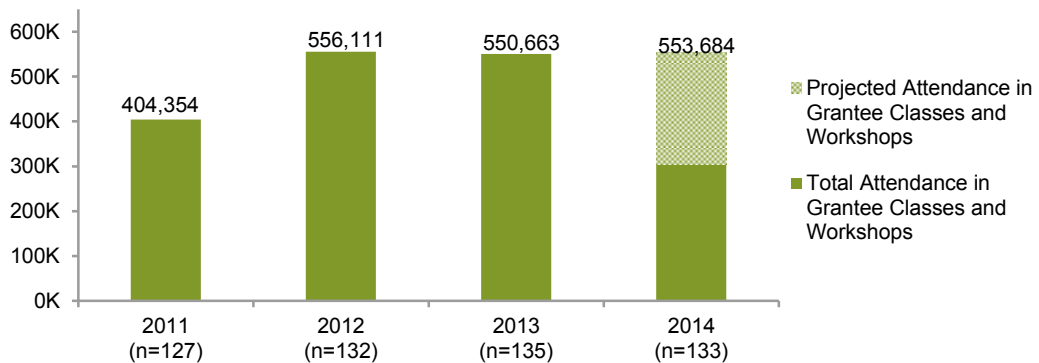Data source: CDP database

Exhibit 19
Total Participation in Continuity & Engagement Grantees' Classes & Workshops
Data source: CDP database

The Strategic Framework also identifies a metric to track the extent to which participation is growing among community-based grantees. Using the three definitions of community-based grantees, participation growth in events, performances, classes and workshops, ranged from 58% to 73% from 2011 to 2014 (Exhibits 20–22). Participation in these grantees' activities is targeted by design to under-reached communities, helping to spread Hewlett's impact beyond the typical audience members. Participation growth between 2011 and 2013 for community-based, culturally specific, and California diverse grantees was largely driven by the same grantee whose participation numbers increased by more than 500,000 during this time period. The significant increase in participation for California diverse grantees, however, was primarily driven by one grantee that was not an active grantee in 2011, but reported more than 1,000,000 total attendees in 2013.

Exhibit 20
Total Participation in California Diverse Grantees' Performing Arts Activities*
Data source: CDP database, Continuity & Engagement Grantees
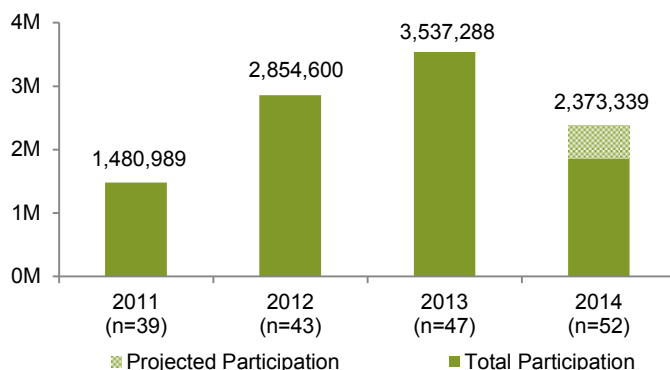
* Total participation in grantees' performing arts activities includes total paid and free attendance at grantee events/performances as well as total participation in grantees' classes and workshops.

Exhibit 21
Total Participation in Community-Based Grantees' Performing Arts Activities*
Data source: CDP database, Continuity & Engagement Grantees

* Total participation in grantees' performing arts activities includes total paid and free attendance at grantee events/performances as well as total participation in grantees' classes and workshops.

Exhibit 22
Total Participation in Culturally Specific Grantee's Performing Arts Activities†
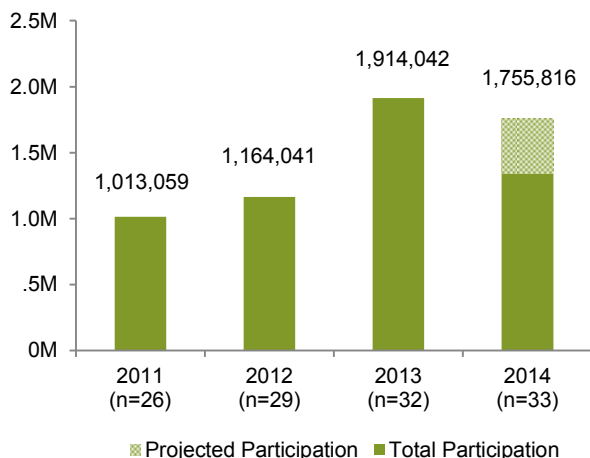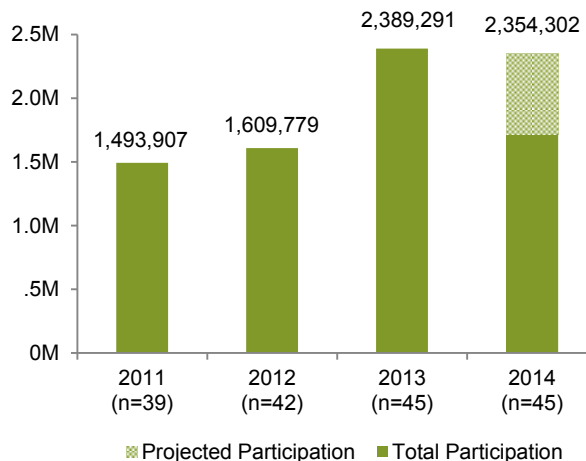Data source: CDP database, Continuity & Engagement Grantees

† Total participation in grantees' performing arts activities includes total paid and free attendance at grantee events/performances as well as total participation in grantees' classes and workshops.

The Strategic Framework's metric on total unique website visitors provides the Foundation with information on how often its grantees' websites are being accessed, which can serve as a proxy for interest in attending a performing arts activity or in the grantee's organization overall. The number of unique website visitors grew by 16% since 2011, with relatively steady counts in 2013 and 2014 (Exhibit 23).

Exhibit 23
Total Unique Website Visitors for Continuity & Engagement Grantees
Data source: CDP database
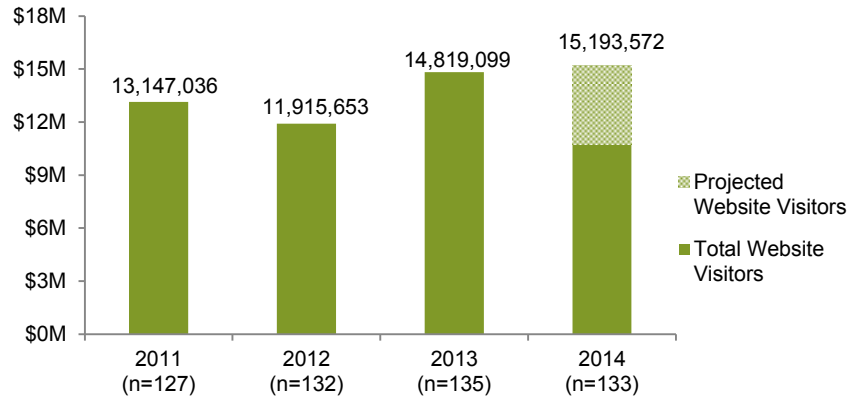
Arts Education

The Strategic Framework identifies four cluster metrics for the Foundation's Arts Education grantmaking as well as an aggregate metric (Exhibit 24). Unfortunately, based on our review of publicly available data as well as outreach to other field leaders, it does not appear that information on the public investment in arts education at the state and local levels is being tracked currently. A contact from the California Alliance for Arts Education, which has also been looking into the availability of this data, said that it has been difficult to track the investments since "districts are not inclined to share what they are spending" and arts funding could show up in several ways in budgets.

Exhibit 24
Arts Education Metrics

	Short-Term Target (2013)	Mid-Point Assessment	Long-Term Target (2017)
Aggregate Metric			
• Percentage of California schoolchildren by race/ethnicity, income, and geography participating in some form of organized arts education (Exhibit 25)	No change	-1.0% to 4.3%	+1%
Activity Cluster Metrics			
• Number of K–12 students receiving in-school sequential, curriculum-based arts education (Exhibit 26)	No change	-0.6% to 5.3%	+1%
• Number of K–12 students participating in after-school and out-of-school arts enrichment programs from grantees (Exhibit 27)	+1%	-26%	+3%
• Public investment in arts education at the state and local levels	-10%	Not available	+1%
• Number of students in pre-professional programs through grantees (Exhibit 28)	No change	+47%	+1%

The aggregate metric as well as one of the activity cluster metrics concern K–12 enrollments[6] in arts education courses. California Department of Education (CDE) data are available for the 2012–13 and 2013–14 school years for enrollment by ethnicity in arts courses. These data are based on K–12 enrollments in courses designed as being in one of the following five categories: Art; Arts, Media and Entertainment; Dance; Drama/Theater; or Music. It does not include courses where art is being integrated into other work. **Based on these data, K–12 enrollments in arts courses increased from 1.3 million in 2012–13 to 1.4 million in 2013–14 with all ethnicities except White and Asian/Pacific Islander meeting the growth target of 1%** (Exhibit 25). In comparison, overall school enrollment by ethnicity remained about the same during this time period. Only the proportion of Hispanic students (+0.54%) and White students (-0.52%) changed by more than half of a percentage during this time. Enrollments also increased in all disciplines except visual art (Exhibit 26).

Exhibit 25
K–12 Enrollments in Arts Courses by Ethnicity
Data source: California Department of Education

	Asian/Pacific Islander	Hispanic	African American	White	Other/Not Reported	TOTAL
2012–13	191,282	638,304	83,935	417,143	50,804	1,381,468
2013–14	191,392	661,366	85,929	412,774	53,003	1,404,464
% Change	0.1%	3.6%	2.4%	-1.0%	4.3%	1.7%

Exhibit 26
K–12 Enrollments in Arts Courses
Data source: California Department of Education

	Visual Art	Arts, Media & Entertainment	Dance	Drama/Theater	Music	TOTAL
2012–13	571,677	154,573	48,855	126,000	480,363	1,381,468
2013–14	567,965	156,679	49,191	132,684	497,945	1,404,464
% Change	-0.6%	1.4%	0.7%	5.3%	3.7%	1.7%

While many factors affect these shifts, the Foundation's grantmaking in Arts Education was identified in the interviews for this assessment as being a contributing factor. Hewlett's Arts Education grantees have made great strides in growing a strong advocacy network of organizations and individuals working on issues related to arts education throughout the state. These include locally-based advocacy groups that support arts education, groups working to develop language about integrating arts education with other subjects for teaching standards, and groups disseminating information about the use of Title I funds for arts education and the impact on California school choices.

A sub-question to the assessment's first guiding question about accomplishments, challenges, and drivers asks what lessons can be learned from the Program's approach to Arts Education grantmaking since it is different than the two other components. Two key aspects of this approach emerged in this assessment's interviews:

1. Arts Education grantees and field leaders described the Foundation's efforts to convene Arts Education grantees and have them work collectively as positive strides which contributed to successes made to date.

2. Much of this work has been focused locally, which according to grantees and field leaders is appropriate since much of the education decision-making is happening at the local level. This is even more so the case since the LCFF's inception.

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[6] Data collected from CDE track students enrolled at a class level. When this is aggregated to the state level, it results in some duplicated counts of students who are enrolled in multiple arts courses. Due to this, we use the term "enrollments" rather than "students" to describe these data.

In addition to its advocacy grantmaking, the Performing Arts Program funds some grantees to provide arts education to youth and pre-professional students. Since 2011, there has been a steady decline in attendance by children 18 years and younger in grantees' out-of-school arts programs (Exhibit 27). This trend is primarily due to one grantee having a gradual decline in participation over the years.

Exhibit 27
Total Participation by Youth in Arts Education Grantees' Arts Delivery Programs*†
Data source: CDP database
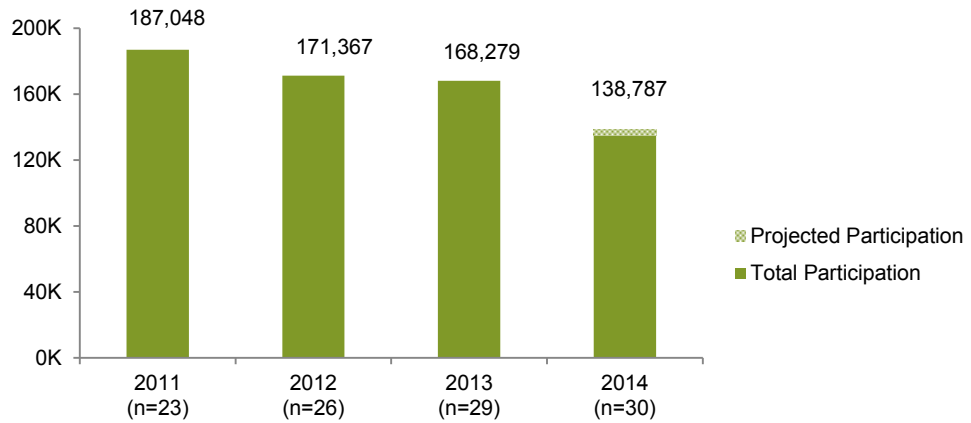
* Youth are individuals 18 years or younger.
† One grantee, a significant outlier in 2014—reporting 4,504,000 virtual attendees—is excluded in this exhibit. This grantee's activities in 2014 included launching a series of webinars, a live-streamed festival, radio and television broadcasts, online PSAs viewed by people nationwide, as well as the launch of a new digital media competition.

The Foundation has funded three to four grantees each year since 2011 who are training the next generation of artists. Enrollment in these pre-professional programs grew by 54% from 2011 to 2013 before a slight decline in 2014 (Exhibit 28).

Exhibit 28
Total Participation in Arts Education Grantees' Pre-Professional Programs
Data source: CDP database
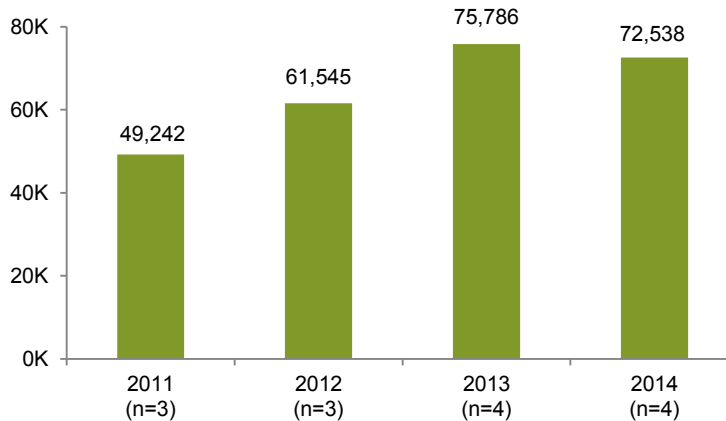
Infrastructure

Exhibit 29
Infrastructure Metrics

	Short-Term Target (2013)	Mid-Point Assessment	Long-Term Target (2017)
Aggregate Metric • Program assessment of overall health of the arts ecosystem	No change	Qualitative assessment	+3%
Activity Cluster Metrics • Participation in arts councils and service organizations (Exhibit 31)	+1%	- 72%	+2%
• Number of organizations and individuals using BACAM and CDP (Exhibit 32)	+2%	+ 4%	+5%
• Percentage of grantees meeting standards for financial health based on income statement and balance sheet indicators (Exhibit 30)	+2%	0%	+5%

The Foundation's Infrastructure grantmaking supports the arts ecosystem's health and sustainability. It is assessed through three cluster metrics and one aggregate metric that mostly look at the portfolio as a whole rather than just the Infrastructure grants (Exhibit 29).

Overall, the portfolio is showing signs of moderate health, with higher attendance numbers in general since 2012 and only 28% of grantees reporting deficits in 2014. This is also reflected in mostly steady median LUNA scores (liquid unrestricted net assets) since 2011 (Exhibit 30). Although overall the scores have remained mostly steady, many grantees report negative LUNA scores, which indicates they are generally financially fragile and thinly capitalized. While there is great variation on this measure across grantees, the direction is slightly positive.

The Foundation's Infrastructure grantmaking also supports service organizations and arts councils, including city governments, arts associations, and grantmakers in the arts. Overall, after an initial increase in participation in arts councils and service organizations between 2011 and 2012, total participation in grantees' arts councils and service organizations has sharply decreased. The significant decrease in participation is

Exhibit 30
Grantees' LUNA Scores as Percentage of Total Annual Expenses*
Data source: CDP database

* The shaded green boxes represent the second and third quartiles of LUNA scores (25th to 75th percentile); the full length of the blue line extending vertically represents the range of LUNA scores for each year (major outliers excluded).Seven outliers, more than four standard deviations from the median, are excluded from this graph: 2011, 803%, -475%; 2012, 809%, -1047%, and -623%; 2013, 900%; and 2014, - 443%.

largely due to two grantees responsible for a significant portion (about two-thirds) of participation in 2011; of these two grantees, one did not report to CDP in 2013 or 2014 while the other reported only a very small number of participants in 2014 (Exhibit 31).

Exhibit 31
**Total Participation in Performing Arts Activities for Arts Councils &
Service Organizations Grantees**
Data source: CDP database
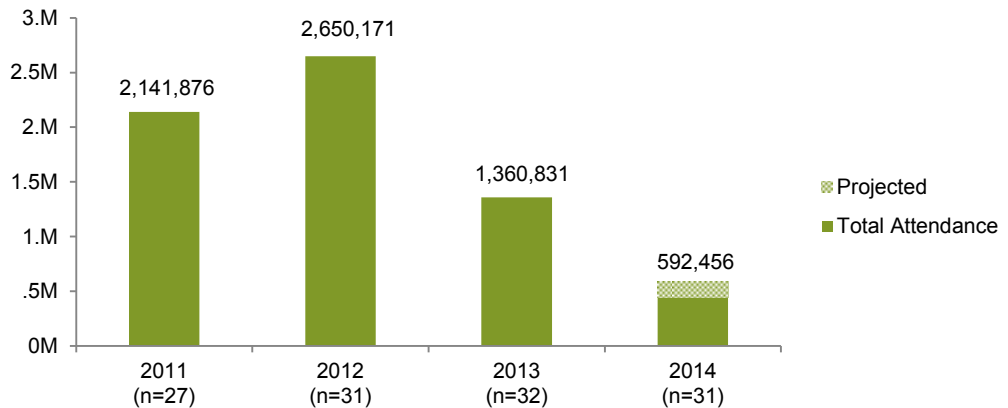
The Foundation's Infrastructure grants support research projects that provide functional information for the arts ecosystem. One specific grant is the Cultural Data Project, in which there has been slight growth in the percentage of grantees reporting to it since 2011 (Exhibit 32). Interview informants described how they use the CDP data as a resource about the arts ecosystem, so having the majority of grantees reporting provides more accurate and complete data. However, they also note a few key limitations. For example, CDP does not yet provide demographic data on audience members. In addition, some question the integrity of the data entered into CDP—i.e., it is assumed that some organizations provide their best estimates when they do not collect data for certain CDP elements. While the CDP is an ongoing data collection project, many of the other research projects funded by the Foundation serve as tool development or a point-in-time snapshot, which was noted as a limitation by a few interview informants who would like to see more funding for supporting ongoing data collection and maintenance of these programs to provide current, up-to-date data for the field, including arts education.

Exhibit 32
Total Number of Grantees Reporting to CDP
Data source: CDP database

	2011	2012	2013	2014
Total Number of Grantees Reporting to CDP	200	187	191	148 (current); 195 (max expected) [7]
Percentage of Grantees Reporting to CDP	80%	83%	83%	65% (current); 86% (max expected)

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[7] Expected count of grantees reporting to CDP for 2014 includes 7 new grantees in addition to all grantees that reported to CDP in 2013 and are still active grantees in 2014, but have not yet reported to CDP this year.

Hewlett Foundation's Impact on the Broader Arts Ecosystem

Interview informants often described the Foundation as having a large, positive impact on the Bay Area performing arts ecosystem and arts more generally throughout the state. This impact is the result of the Foundation's broad investment strategy, including its direct grantmaking and the work it accomplishes through its intermediary grantmaking partners, and the perception of the Foundation and the Performing Arts Program staff as field leaders and experts.

> *"The fact that this is such a culture rich community is an absolute testament to the Hewlett Foundation. That there's that kind of variety and that it is so broadly supported by Hewlett has created a cornucopia of cultural opportunity in the Bay Area."*
> – Grantee

Although Hewlett is impacting the arts field, multiple interview informants suggested that the Foundation could make a stronger impact by becoming a more visible leader in arts advocacy (perhaps this could be more similar to the Program's role in arts education advocacy). In addition, a notable minority of interview informants, primarily grantees, were not able to speak to Hewlett's broader impact on the field. They felt they did not know enough about the Foundation's funding and portfolio to speak to this.

> *"I will say this mostly out of ignorance because I'm not really sure what they're doing in the grant and the foundation world and how they're advocating, but if you were to ask me to name five foundations that are really advocating or acting as leaders in the field, I don't know that I would name Hewlett as one. I would love to see Hewlett take a more proactive or forward step in really defining how they fund the way they do and why they fund the way they do."*
> – Grantee

RECOMMENDATIONS

As documented in this report, overall, the Program's grantmaking strategy is having a lot of positive impact on supporting a vibrant arts ecosystem in the Bay Area. The positive trajectory of a number of the metrics in this assessment attest to this; interview informants representing grantees, field leaders, peer funders, and artists and cultural entrepreneurs also praise the Foundation's approach to grantmaking and encourage the Foundation to continue. Particular grantmaking approaches that are essential to maintain include:

- Multi-year grants
- General operating support
- Capacity and infrastructure support
- Intermediary grantmaking as a way to reach individual artists and smaller art groups

Building upon this success, rather than suggesting a significant shift, the following recommendations provide opportunities to refine and expand the existing strategy to maximize impact.

Top Priorities

The following six recommendations are top priorities because we believe they are necessary for the Program to meet the intentions of the current Strategic Framework, considering the shifting external environment, the needs of the arts ecosystem, and the potential from leveraging existing investments.

1. **Support organizations to engage a shifting audience.** As the population in the Bay Area continues to shift—becoming more ethnically diverse, socioeconomically stratified, aging, etc.—existing arts organizations need to identify if and how they can engage this evolving audience. For some organizations this would involve an organizational shift from thinking of serving a niche market to the opportunity of serving a more diverse audience. For others, it might involve new outreach networks and mechanisms, cultural competencies, and other new skills. To support this work, the Program can give more capacity building funding to individual grantees to build their capacity to reach a broader or different audience. At the same time, infrastructure grants and grants to intermediaries can help grantees across the Bay Area in this way through workshops, resources, and other supports that offer various approaches to audience engagement.

2. **Increase funding for regranting intermediaries to address underserved populations.** As suggested by the research on audience reach, as well as in key informant interviews, there are populations in the Bay Area that are less well served by the Foundation's support, particularly Latino, Asian and low-income communities. There are also questions of whether geographic areas farther away from the urban hubs could benefit in particular from increased support. While one intention for the Program's Arts Education funding is to support performing arts among some of these target audiences, support for communities beyond students in public schools is also important. To the extent that performing arts for various communities happens at a more grassroots level, and given the Program's limit on supporting organizations with budgets of at least $100,000, expanding grantmaking to regranting intermediaries presents a great opportunity to meet this need. As recommended in the Program's Intermediary Assessment, beyond resources for regranting, it would also be beneficial to support capacity-building services for individual artists and small organizations and to deepen the grantmaking knowledge of non-foundation intermediaries (Olive Grove Consulting & Informing Change, 2014).

3. **Keep the existing focus on the performing arts while embracing the variation in how the performing arts are defined.** We cannot envision a day when the community collectively says, "We have enough performing arts; the market is saturated." With this in mind, we recommend that the Program maintain its focus and continue to leverage its experience and core competencies on the performing arts rather than expanding to other areas such as visual or literary arts. That said, within the performing arts focus, it is important to continue to be flexible in supporting innovation, cross-disciplinary approaches, and different business models in the arts that are of growing prevalence. We know that the Performing Arts Program staff have considered expanding the geography and art disciplines served, but given the current staff capacity and expertise, Program staff are currently inclined to go deeper in their work rather than expanding.

4. **Facilitate networking, collaboration, and cross-organizational learning across grantees doing similar types of work.** The Performing Arts Program has been supporting a collective movement building effort among Arts Education advocacy and policy grantees, and many mentioned how beneficial this has been to their work. They claim that it is making an important contribution to their successes. Other grantees and interview informants expressed interest in having similar—though much more small-scale—convenings, or even just having the Foundation facilitate connections between grantees and other arts organizations. These organizations are not looking for Hewlett to take a leadership role as it is in the arts education policy and advocacy arena. Rather, they are interested in having the time, space, and facilitation (e.g., a semi-annual or annual meeting of grantees at the Foundation) to have conversations with one another. Arts organizations believe that this relatively low-cost activity for the Foundation could easily add value to their work. This desire was echoed in the Program's Intermediary Assessment (Olive Grove Consulting & Informing Change, 2014).

5. **Prioritize capacity building grants for organizational capitalization and leadership.** The Program's approach of generally awarding core operating support and the growing use of organizational effectiveness grants underscore's the Program's priority on organizational capacity. As the Program continues with these efforts, it will be important to ensure that they are addressing some of the most pressing capacity needs of the arts ecosystem, namely the financial stability of organizations, succession planning, and supporting internal professional development funds to enhance core competencies for potential future leaders.

6. **Increase funding to underserved communities.** Going forward, Hewlett should focus on dedicating a larger proportion of grant dollars to underserved regions in the North and South Bay, particularly Santa Clara, Monterey and Solano counties, in addition to non-metro areas, to enable potential audiences in those counties to experience the performing arts. Underserved racial/ethnic communities—particularly Asian and Latino communities—as well as lower-income communities also warrant increased support. One area for further exploration is to what extent there is unmet demand that could be supported by funding performing arts organizations, and to what extent focusing investment in arts education and advocacy will help develop greater appreciation, perceived relevancy, and demand for the performing arts in these underserved communities over time.

Opportunities to Increase Understanding of Hewlett's Performing Arts Strategy

We learned particularly in key informant interviews that many people's perceptions of the Performing Arts Program's strategy are not accurate. Therefore, the following recommendations aim to address these misperceptions.

- **Communicate more clearly and frequently about the Foundation's work as a champion for the arts.** The Hewlett name is deeply respected in the arts field, yet informants perceive that much of the Foundation's work is happening behind the scenes, working with grantees on an individual basis. Interview informants said they would like to see the Foundation become a more visible and vocal presence as a leader in the arts ecosystem, particularly as an advocate for arts funding in general and for traditionally underrepresented artists and organizations. This leadership could take different forms, and would need to fit with the Foundation's overall culture.

- **Proactively share the Program's grantmaking approach.** Grantees and others in the field sometimes lack an understanding of the Program's grantmaking approach, including what grantees are working on and accomplishing. These misperceptions lead to people wanting Hewlett to be doing things that it already is doing or that are not part of the Program's strategy. More explicit and frequent communication around the Program's grantmaking strategy would help individuals and organizations in the arts community better understand the role that Hewlett is playing and could potentially play as a leader in the arts ecosystem.

Recommendations Related to Portfolio Tracking Data & Metrics

The Foundation's GIFTS database tracks a wealth of information about the portfolio. To maximize the potential of these data, Program staff should review their approach to coding grant information to improve consistency in how grants are being tracked in GIFTS. Particular areas to review include geography served and art discipline. There is also ongoing conversation about which definition (or definitions) to use for tracking community-based grantees.

- **Geographic coding:** This assessment uncovered several inconsistencies in geographic coding of Program grants. There were questions about whether the geographic code represented the county in which the grantee is headquartered, or if it represented the primary counties served by the grantee's work. We recommend that grant applicants be asked to designate the counties they primarily serve, and populate the GIFTS database with this information. In addition, rather than coding any grantee that serves more than one county as Bay Area, as is currently the practice, use the capacity of GIFTS to capture multiple specific counties. Grantees with a true region-wide focus could still be coded as serving the Bay Area.

- **Art discipline coding:** Similar to the geographic coding, we recommend coding grants that cover more than one discipline as each of those different disciplines rather than multidiscipline. This will allow for greater understanding of the types of disciplines being combined.

- **Community-based grantees:** We believe there is value in all three of these designations, as they represent different concepts and because California diverse is a Foundation-wide category. We recommend continued tracking of all three categories. Clarifying the definitions among Program staff and conducting a collective periodic review of how grants are coded will ensure consistent coding.

Continuity & Engagement Metrics

Based on the analysis for this mid-point assessment, the Strategic Framework's Continuity and Engagement metrics collectively present a helpful overview of grantee accomplishments. We recommend continuing to assess progress using these metrics; however the Program staff should revisit the targets to better align them with the more dramatic growth that has happened since 2011 and develop higher expectations for long-term targets.

Of note, however, is that the participation gap between demographic groups for this assessment was measured by the ARC research, which was a short-term, not an ongoing project. Since one objective of the ARC process was to build capacity of grantees to understand their audiences, some organizations may continue to collect this information. Others might decide to incorporate some of the methodology into their work. We recommend adding the ARC data fields to CDP so that those continuing with some form of audience research can report on these data. It would also be helpful for organizations to be able to indicate whether the data they provide are based on staff estimates or from analysis of audience participation data.

Arts Education Metrics

We recommend some adjustments to the Arts Education metrics to focus on data that are readily available. CDE's arts enrollment data, while useful, are challenging to access and aggregate as currently reported. If CDE does not provide data in an easy to obtain form, the Program may find it easier to use metrics for which data are more readily available. CDE provides aggregated data on the following topics, which could be considered as replacement metrics:

- Number of art classes
- Number of schools offering art classes
- FTE for arts teachers

All of these data points are available at the school, district, county, and state levels. We understand that there are efforts underway to make CDE data easier to access, and we recommend that Hewlett keep abreast of these developments. An important limitation of any of the CDE data are that they do not provide an unduplicated number of students enrolled in arts education; a student may be enrolled in more than one course.

Currently, there are no data available for assessing public investment in arts education. Collecting these data would be highly complicated since funding allocations are made at the local level and arts funding may be incorporated into various budget line items for different school districts. We recommend removing this metric from ongoing tracking. The California Alliance for Arts Education is beginning to track LCAPs to see which school districts are including funding for arts education and how they are including it. Tracking LCAPs like this could show which communities are receiving more or less funding for arts education, providing some insights on who is being served. Depending on the timing of the California Alliance for Arts Education's efforts, this could be a replacement metric. We recommend that the Program staff further explore these and potentially other evolving data sources, as they may provide fruitful metrics for the Program to track into the future.

Infrastructure Metrics

Finding appropriate metrics for understanding the overall health of the arts ecosystem, and ideally the contribution of Hewlett's work to that health, is somewhat challenging. We recommend continuing to measure the number of organizations and individuals using CDP and assessing grantee standards for financial health.

We question the utility of the metric about participation in arts councils. While this metric is valuable for understanding arts council relevancy in particular, since what arts councils provide is so widely varied and is so dependent on annual California Arts Council funding, it is not a strong metric for understanding the health of the field overall.

As a replacement, the Program could add a metric around organizational leadership to round out the understanding of the health of the arts ecosystem. Options to consider include the number of organizations that have undergone a leadership transition in the last year, or a comparison of the mean salary of arts education grantee leaders to the mean for Northern California in aggregate.

Additional Considerations

The following recommendations present options for the Program to consider that can help boost the effectiveness of the strategy.

- **Keep Program staff capacity aligned with the Program's growing portfolio.** The Performing Arts Program has a deep and effective relationship-based approach to its grantmaking, as witnessed by the Program's high marks on the Grantee Perception Report. This approach requires Program staff to understand and be attentive to the grantees' needs and shifting priorities. Practically speaking, this takes time. As the Program grows its portfolio, its role in the arts ecosystem, or both, is there adequate capacity among the current, highly regarded, Program staff? Additional staff capacity could allow Program officers to establish new relationships and deepen existing ones within underserved communities, serve as leaders in the arts ecosystem, and serve more grantees.

- **Invest in board restricted reserve funds that focus on short-term cash flow needs to improve capitalization, and in the next planning cycle consider more significant investments in space and artist housing stabilization and other capital projects.** The financial fragility across performing arts organizations is sobering. With dramatic rent increases, living wage ordinances, move expenses and more, organizations sometimes just need a cash cushion. Now, during a healthy economy, is the time to help organizations build the protection they need for when the next downturn happens. At a minimum this strategy will help Hewlett protect the investments it is making in the good years. For those where debt is an issue, helping to retire a debt is another opportunity.

- **Continue to enhance partnerships with other funders and arts organizations.** Hewlett should continue to leverage the Program's historical success in funder partnerships by exploring collaboration with those successfully engaging the most diverse communities and audiences. In their interviews, peer funders expressed an interest in partnering with the Foundation, particularly around engaging underserved communities and populations.

- **Continue supporting research and evaluation projects that help the field better understand who is being served and arts-related trends.** According to interview informants, having these data publicly available and updated on a regular basis is immensely useful to those in the field. Research areas of particular interest include analysis of LCFF and its impact on arts education funding throughout California, data on populations being served, and data on the field overall.

- **Offer cohort learning in conjunction with organizational effectiveness grants.** To support smaller grantees or organizations supported through regranting that are more likely to experience capacity gaps in areas such as fundraising, advocacy, human resources, etc., cohort learning is a way to leverage resources for the benefit of multiple organizations and the ecosystem more broadly.

- **Support the application process for potential new grantees.** Interview informants shared that the application process, and in particular the logic model component, can be daunting to first-time grant seekers, particularly those from underserved populations. We understand that Hewlett is already making adjustments in this process to ease the burden for new grant seekers.

CONCLUSION

Taken together, the findings in this mid-point assessment demonstrate that the Performing Arts Program has a strong Strategic Framework that guides its work. Our recommendations provide guidance on how the Foundation can make adjustments to continue on a course as a leading funder in the Bay Area arts community. The arts ecosystem benefits deeply from Hewlett's investments and looks to the Foundation for ongoing support, leadership, and inspiration.

Appendices

Additional Assessment Methodology Information

ASSESSMENT QUESTIONS

The evaluation centered on the following four core questions, each of which has additional sub-questions:

1. In light of our short- and long-term goals, what have been our key accomplishments and challenges? What do we know about the main drivers—both the enablers and inhibitors for these results?

   a. Do the Program's component metrics and targets (Strategic Framework pages 14–19) accurately reflect progress towards its ultimate goal of ensuring thriving arts ecology that benefits individuals and communities throughout the Bay Area? What can be attributed to Hewlett's investment?

   b. What can be learned from the Program's targeted work in the arena of Arts Education advocacy and policy that might be applied to other parts of the portfolio? Given the limited budget allocated to Arts Education what are appropriate metrics and targets?

2. Which geographic and demographic communities have benefitted from Hewlett support and where do gaps lie?

   a. How has the portfolio evolved over time by geography, discipline, budget size and community-based grantees? How does this map against SF Bay Area changing demographics and infrastructure to distribute funding?

   b. To what degree does the Program's grantmaking strategies and approach align with its priority to reach underserved communities and geographies?

   c. What are the best methodologies (quantitatively and qualitatively) to evaluate and identify which communities are benefitting from Hewlett support and who might be missing from the portfolio?

3. To what degree did our original assumptions about how change would happen turn out to be true?

   a. Do the landscape assumptions undergirding the Strategic Framework still hold true (pages 5–6)? Should other factors or a newer nuanced understanding of them be adopted?

   b. The Strategic Framework asserts baseline data and some future predictions on the Program's budget allocations, disciplines supported, and geographies reached by our portfolio (pages 21–23). Are these assumptions appropriate based on the external environment and the maximization of the impact of Hewlett resources?

4. What are the shifts in the external landscape and broader Bay Area arts sector, including new research, which may call for some adaptation of the Program's core strategies, our targets for change, or how we measure progress?

   a. How has the external environment changed, and does it enhance the Program's opportunity for increased impact or require adjustments to respond appropriately?

   b. What do stakeholders from the constituent feedback groups see as emerging challenges and opportunities?

INTERVIEW INFORMANTS

Peer Funders

Akonadi Foundation, Melanie Cervantes
City of San Jose, Office of Cultural Affairs, Kerry Adams-Hapner*
Grantmakers in the Arts, Janet Brown*
San Francisco Arts Commission, Tom DeCaigney*
The Irvine Foundation, Josephine Ramirez
The Rainin Foundation, Shelley Trott
Walter and Elise Haas Fund, Creative Work Fund, Frances Phillips*

Community-Based Arts Leaders

American Indian Film Festival, Michael Smith*
Arts Council Monterey, Berniz House*
Causa Justa/Just Cause, Dawn Phillips
El Teatro Campesino, Kinan Valdez*
Golden Thread Productions, Torange Yeghiazarian*
Lesher Foundation, Kathleen Odne
San Francisco Foundation, Anyka Barber
Sins Invalid, Patricia Berne*
Walnut Creek City, Linda Johnson

Artists & Cultural Entrepreneurs

Center for New Music, Adam Fong
Diamano Coura, Esailama Diouf-Henry*
Imaginist, Brent Lindsay & Amy Lindsay*
NAKA Dance Theater, Debby Kajiyama & Jose Navarrete
Sangam Arts, Usha Srinivasan
School of Arts and Culture at MHP, Tamara Alvarado*

Grantees

Arts Education Grantees

Alameda County Office of Education, Louise Music*
California Alliance for Arts Education, Joe Landon & Jennifer Wong*
California County Superintendents, Sarah Anderberg*
Los Cenzontles Mexican Arts Center, Eugene Rodriguez*
Performing Arts Workshop, Jessica Mele*
Young Musicians Program, Daisy Newman*
Youth Speaks, James Kass*

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* Current grantee of Hewlett's Performing Arts Program.

Continuity & Engagement Grantees

Berkeley Repertory Theater, Susie Medak*
First Voice, Brenda Wong Aoki & Mark Izu*
MACLA, Anjee Helstrup-Alvarez*
Music@Menlo, Edward Sweeney*
Queer Women of Color Media Arts Project, Kebo Drew & Madeleine Lim*
Santa Rosa Symphony, Alan Silow*
Wells Fargo Center for the Arts, Richard Nowlin*
Yerba Buena Center for the Arts, Deborah Cullinan*

Infrastructure Grantees

California Arts Council, Craig Watson*
Center for Cultural Innovation, Angie Kim*
Create CA, Patricia Wayne*
Sustain Arts, Marc Vogl*
WolfBrown, Alan Brown^

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The William and Flora Hewlett Foundation. GIFTS Data [Data file].

WolfBrown. Audience Research Collaborative 2012–2015 [Data file].

^ Contractor, not a grantee.

Interview Protocols

PEER ARTS FUNDER & COMMUNITY-BASED ARTS LEADERS

Thank you for taking the time to speak with me today. [Introduce yourself and your organization.] We are working with the Hewlett Foundation's Performing Arts Program to assess their current strategic framework's successes, challenges and opportunities for future refinement.

To give you some context about Hewlett's Performing Arts Program, they invest in three key areas: 1) continuity and engagement, 2) arts education, and 3) arts infrastructure. Their budget is currently about $18 million spread over the 11 counties touching the Bay Area. Hewlett predominately gives general operating support over 3 year terms.

Today, we will be talking for about 30–45 minutes about your perception on the overall Bay Area performing arts ecosystem and Hewlett's role within it. Everything you say will be kept confidential; your name and organization will not be linked to specific findings. We may quote you in our report to the Foundation, but will take precautions to protect your confidentiality.

Do you have any questions before we begin?

1. Can you briefly describe your role at your organization, the focus of your work and how you may be involved with performing arts or arts philanthropy, broadly speaking, in the Bay Area or statewide?

EXTERNAL ENVIRONMENTAL SHIFTS

2. What shifts, if any, have you seen over the past three years that are affecting the Bay Area performing arts ecosystem (e.g., art form, demographics, technology, leadership, funding, economy)? What are the emerging challenges and opportunities related to the shifts you are seeing?

   a. What about shifts related arts education statewide? We're curious about arts education in the K-12 and out-of-school time settings, as well as research and advocacy to improve state and local policy related to arts education?

   b. Do you see any shifts related to the infrastructure that supports arts organizations and artists?

3. What do you think is driving these shifts? [Note: Listen for responses related to Hewlett's assumptions around shifting demographics and the influence of technology and new media]

4. How do you think the arts ecosystem, its infrastructure and arts education may evolve over the next few years? What will the organizations and artists greatest needs be?

WHO HAS BENEFITTED & WHERE ARE THE GAPS

5. Thinking about the Bay Area performing arts ecosystem overall, are there specific segments of the arts community that you perceive as under-served or under-resourced (audiences, art forms, geographic communities)? [Note: We do not mean just by the Hewlett Foundation's Performing Arts Program grantmaking]

    a. Do you see particular under-served or under-resourced communities related to arts education?

    b. Have you noticed shifts in under-served or under-resourced communities over the last three years?

    c. On the other hand, are there other segments of the performing arts community that you perceive as adequately funded or more attended to?

6. Do you have suggestions on how to address under-served or under-resourced segments of the performing arts community generally or related to arts education more specifically?

7. Do you have any particular suggestions for Hewlett regarding their approach or focus on how to address these gaps?

8. **(For Peer Arts Funders)** To what extent, if at all, has your foundation's funding been influenced by a focus on serving under-served or under-resourced arts communities?

    a. What has worked well with your approach and what could work better?

    b. Is there the potential for you to work collaboratively with other funders committed to the Bay Area arts community to broaden reach and impact within these communities?

HEWLETT FOUNDATION ACCOMPLISHMENTS & CHALLENGES

9. Can you briefly describe your relationships with, or knowledge of the Hewlett Foundation's performing arts funding priorities? [Note: If they are not very familiar with the Foundation we can skip this part of the interview]

10. **(For Hewlett Grantees)** As a grantee, to what extent, if at all, have the Hewlett Foundation's investments impacted your organization and your work?

11. Thinking more broadly, drawing from your perspective [add context about their perspective (e.g., geographic area, funder, grantee, etc.)] to what extent, if at all, do you think the Hewlett Foundation's investments have impacted:

    a. The Bay Area public's engagement in a variety of arts disciplines?

    b. The accessibility of California students to multidisciplinary arts education opportunities?

    c. The infrastructure that arts organizations and artist need to be effective?

    d. Can you provide some specific examples of where you believe they have had particular impact?

12. Are there specific obstacles you can identify that may have limited Hewlett's impact related to the performing arts ecosystem, including infrastructure, and arts education?

13. How do you think the Hewlett Foundation's Performing Arts Program can best contribute to the Bay Area performing arts ecosystem over the next 3 years (short-term)? 7–10 years (longer-term)?

CONCLUSION

14. What data do you use or have you seen used to understand and monitor the Bay Area arts ecosystem? Are there data that you wish were available to help you better understand the Bay Area arts ecosystem?

15. Do you have any concluding remarks, input or topics you'd like to share with us as related to this project that we have not addressed?

Those are all of my questions. Thank you for your time.

ARTISTS/ENTREPRENEURS & HEWLETT GRANTEES

Thank you for taking the time to speak with me today. [Introduce yourself and your organization.] We are working with the Hewlett Foundation's Performing Arts Program to assess their current strategic framework's successes, challenges and opportunities for future refinement.

To give you some context about Hewlett's Performing Arts Program, they invest in three key areas: 1) continuity and engagement (i.e., grants for providing traditional and innovative works to the Bay Area public so they engage in a variety of arts experiences), 2) arts education (i.e., grants targeted to increasing the extent to which California students have equitable access to multidisciplinary arts education opportunities in and outside of school), and 3) arts infrastructure (i.e., grants designed to ensure organizations and artists have the resources to be effective). Their budget is currently about $18 million spread over the 11 counties touching the Bay Area. Hewlett predominately gives general operating support over three-year terms.

Today, we will be talking for about 45 minutes about your perception first on the overall Bay Area performing arts ecosystem and then Hewlett's role within it, (for grantees: including your experience as a grantee). Everything you say will be kept confidential; your name and organization will not be linked to specific findings. We may quote you in our report to the Foundation, but will take precautions to protect your confidentiality. If you feel like there are any questions you are not able to respond to, that is fine and we will move on. Do you have any questions before we begin?

1. Can you briefly describe your role in your organization and how you may be involved with performing arts broadly speaking, in the Bay Area or statewide?

EXTERNAL ENVIRONMENTAL SHIFTS

2. What shifts, if any, have you seen over the past three years that are affecting either your organization's work or the Bay Area performing arts ecosystem more generally (e.g., art form, demographics, technology, leadership, funding, economy)?

   a. What, if any, new opportunities have emerged over the last three years for art organizations and artists in the Bay Area?

b. What, if any, new challenges or needs have emerged over the last three years for art organizations and artists in the Bay Area?

c. **(If not already mentioned)** What do you think is driving these shifts? [Note: Listen for responses related to Hewlett's assumptions around shifting demographics and the influence of technology and new media.]

3. **(For infrastructure grantees, if not already mentioned)** Have you seen any shifts related to the infrastructure that supports arts organizations and artists, such as funding mechanisms or supports that help artists and arts organizations improve their internal operations or expand their external reach?

4. **(For arts education grantees, if not already mentioned)** What about shifts related to arts education statewide? We're curious about arts education in the K–12 and out-of-school time settings, as well as research and advocacy to improve state and local policy related to arts education.

5. How do you think the arts ecosystem, including its infrastructure and arts education, may evolve over the next few years?

WHO HAS BENEFITTED & WHERE ARE THE GAPS

6. Thinking about the Bay Area performing arts ecosystem overall, are there specific segments of the Bay Area community that you perceive as under-served or under-resourced (e.g., demographic communities, geographic communities, audiences, art forms)?

a. **(For arts education grantees)** Do you see particular under-served or under-resourced communities related to arts education?

7. Do you have suggestions on how to better reach these segments?

a. Do you have any particular suggestions for Hewlett regarding their approach or focus on how to address these gaps?

8. As you may have also experienced in your work, it is very challenging to know who is missing or not being reached by the Foundation's grantmaking. Do you have any suggestions or ideas on ways to better identify these communities around the Bay Area specifically and the state overall?

HEWLETT FOUNDATION ACCOMPLISHMENTS & CHALLENGES

9. As a grantee, to what extent, if at all, have the Hewlett Foundation's investments impacted your organization and your work?

a. **(For grantees, including the artists/entrepreneurs who are grantees)** What are the greatest accomplishments as a result of the Hewlett Foundation's investments in your organization's work?

b. **(For grantees, including the artists/entrepreneurs who are grantees)** What other factors have contributed to or hindered Hewlett's impact on your organization's work?

10. Do you have any suggestions for how the Foundation might better support or work with its grantees?

11. Thinking more broadly and drawing from your perspective, to what extent, if at all, do you think the Hewlett Foundation's investments have impacted the Bay Area public's engagement in a variety of arts disciplines?

a. **(If not already mentioned)** What about the infrastructure that arts organizations and artists need to be effective?

    b. **(For arts education grantees)** What about the accessibility of California students to multidisciplinary arts education opportunities?

12. How do you think the Hewlett Foundation's Performing Arts Program can best contribute to the Bay Area performing arts ecosystem over the next 3 years (short-term)? 7–10 years (longer-term)?

SPECIFIC ARTISTS & CULTURAL ENTREPRENEUR INTERVIEWEES QUESTIONS

13. From your perspective, what are the key needs and challenges facing individual artists and cultural entrepreneurs as they seek to produce work and create sustainable livelihoods?

14. From your perspective, what are key opportunities for artists and cultural entrepreneurs to deepen and sustain their work?

15. How do you think organizations like a Hewlett Foundation or arts philanthropy in general can better support artists and cultural entrepreneurs?

CONCLUSION

16. Do you have any concluding remarks, input or topics you'd like to share with us as related to your work or the Bay Area arts ecosystem that we have not addressed?

<p align="center">Those are all of my questions. Thank you for your time.</p>

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INFORMING CHANGE