

Foreword



A handwritten signature in black ink that reads "Josephine Ramirez". The signature is fluid and cursive, with a long tail on the final letter.

Josephine Ramirez
Arts Program Director

The James Irvine Foundation
 December 2012

As a longstanding funder of the arts, The James Irvine Foundation seeks to foster vitality in the field, supporting arts organizations as they navigate a shifting environment. Because of our commitment to advance change, this independent report on the Arts Innovation Fund by Slover Linett Strategies struck a meaningful chord for us at Irvine. Although the initiative took place under our previous [Arts program](#) strategy, the work and learning it produced in many ways foreshadowed the goals and priorities of our new strategy.

We launched the Arts Innovation Fund in 2006 to help California's largest cultural institutions learn how they might become more capable of adapting to widespread changes affecting their businesses. The initiative enabled these institutions to conduct projects as a type of research that would shed light on their appetite for these innovations, their capacity to produce them and the enduring impact they might achieve from new practices.

We have long partnered with major arts organizations because they are important to civic life and essential to a stable arts ecosystem. Their ability to evolve and gain relevance in today's California correlates to the quality of life in our local communities.

We are proud of the Arts Innovation Fund grantees for going down this road with us. They are large and complex institutions with leaders who are willing to discover and learn, despite competing demands and pressing economic realities. The new approaches they pursued yield insights and examples that may benefit arts organizations of all sizes, as well as arts funders, policymakers and others who share our concern for the long-term vitality of this sector.

Reflecting on the Arts Innovation Fund gives us a greater appreciation for the challenges inherent in innovation, and deeper knowledge of the time and resources needed to fuel significant change. We thank the Slover Linett evaluation team for their keen eye and clear voice in assessing this multifaceted, multiyear endeavor. Their analysis of the Arts Innovation Fund is not about successes or failures of individual projects; rather, it profiles some of the valuable lessons we all learned through the process of experimentation.

We are grateful to the 19 organizations that participated in this initiative. Through their openness and diligence we can see the remarkable potential that arts organizations have to embrace innovation and knit new, meaningful relationships with audiences, communities and artists. Their innovation projects solidly connect to a question

posed in this report, which is also quite similar to a question we constantly ask ourselves as Irvine's new Arts strategy emerges: How can the arts become more relevant and meaningful to more people — and to more *kinds* of people?

Our Arts program goal is to promote engagement in the arts for all Californians because we believe that the arts strengthen our diverse human connections and help communities thrive in a dynamic, complex social environment. We depend on organizations like our Arts Innovation Fund grantee-partners and others who, amid myriad pressures, continue to experiment with new ways to meaningfully engage Californians and reimagine the ways we work as a field.

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Arts Innovation Fund

Between 2006 and 2011, The James Irvine Foundation made more than \$24 million in grants and technical assistance to support 28 projects at 19 of California's leading arts institutions. These Arts Innovation Fund grants provided risk capital that organizations could use in a variety of ways to experiment with new work, reach people in new ways and enhance their internal operations — to prepare themselves for new constituent expectations in a changing cultural landscape. New York-based consultants EmcArts also helped manage the initiative and provided regular coaching to help the organizations pursue innovation and organizational change.

Executive Summary

19

PARTICIPATING ORGANIZATIONS

[American Conservatory Theater](#)

[Berkeley Repertory Theatre](#)

[Center Theatre Group](#)

[de Young Museum](#)

[Hammer Museum](#)

[Japanese American National Museum](#)

[La Jolla Playhouse](#)

[Los Angeles County Museum of Art](#)

[Los Angeles Philharmonic](#)

[Museum of Contemporary Art San Diego](#)

[Oakland Museum of California](#)

[Pacific Symphony](#)

[San Diego Opera](#)

[San Francisco Ballet](#)

[San Francisco Museum of Modern Art](#)

[San Francisco Symphony](#)

[The Museum of Contemporary Art, Los Angeles](#)

[The Music Center](#)

[The Old Globe](#)

Starting in 2006, a group of leading California arts institutions set out to innovate with new ways of working in the 21st century. With support from the Arts Innovation Fund of The James Irvine Foundation, they approached the challenge of innovation in a variety of ways, with a wide range of objectives and results. Across the board, the experimentation process prompted organizational reflection and change. Most grantees developed new levels of adaptive capacity, an attribute that many thought leaders believe will be essential for arts organizations, and the arts sector as a whole, to thrive into the future.

After a strategic qualitative review of the innovation projects pursued by organizations participating in the Arts Innovation Fund, the Slover Linett evaluation team offers the following insights and recommendations for consideration.

Insights for arts organizations

Most institutions participating in the Arts Innovation Fund used grant dollars and technical support to initiate experimental projects designed to close perceived “relevance gaps” between the arts organization and its audiences, its communities and professional artists. In short, they sought to make their art forms more meaningful to more people, focusing in one or more of three areas:

- **Audience engagement:** Reaching new and existing audiences in more active ways, e.g., involving non-professionals in art-making, social experiences, dialogue and critique.
- **Community connection:** Pursuing a more significant, authentic role in civic life, e.g., addressing contemporary social issues, involving community members in the artistic process and collaborating with community organizations.
- **Artistic edge:** Moving professional artists closer to the center of the organization's identity, e.g., involving artists as organizational decision makers, inviting artists' perspectives in new ways and supporting more complex and challenging artworks.

Through their projects, Arts Innovation Fund grantees learned lessons about experimentation and innovation within major cultural institutions — lessons that may benefit cultural organizations of all sizes. Furthermore, participating organizations reported that the process changed them in lasting ways.

Key observations include:

1. **Incremental progress:** The innovation experiments played a limited but important role in the overall strategies of these large, well-established arts institutions.
2. **Contained innovations:** Organizations insulated themselves against the risk of innovation by creating buffers between core programs and the experimental projects — which also may have limited the projects' results and sustainability.

3. **Challenges of change:** The innovation projects compelled new thinking and modes of operation, leading to tensions over departmental ownership and limited time and resources.
4. **Crucial coaching:** Gains were credited, in part, to coaching support from EmcArts, which facilitated high levels of reflection, collaboration, self-evaluation and revision.
5. **Culture adaptations:** Although small and contained, the innovation projects prompted lasting organizational change, making participants more communicative and collaborative and less hierarchical.
6. **Leadership support:** Organizations most satisfied with their results had leaders highly committed to, and supportive of, the innovation process and project.
7. **Elusive sustainability:** Without sustained outside funding, few of the innovation projects are likely to be carried forward after grant periods end.

Recommendations for funders, policymakers and assistance providers

Our analysis of the grantees' Arts Innovation Fund experiences led to six recommendations for organizations and individuals interested in supporting a new future for the arts through innovation:

1. **Custom coaching:** Build third-party coaching into grant programs that support innovation and change; give grantees a choice in consultants to meet each organization's unique needs.

2. **Trustee matches:** Encourage partial funding matches from board members in order to make post-grant sustainability more likely.
3. **Patient funding:** Recognize that real innovation is a long-term process requiring long-term investment.
4. **New revenue streams and business models:** Encourage arts organizations to sustain innovation projects by developing both earned and contributed revenue, and support experimentation with new structural models.
5. **Idea-sharing:** Establish venues and norms for sharing ideas and experiences across organizations to spread and speed innovation.
6. **Focus on meaning:** Reframe the question away from “how to engage audiences” and toward “how arts experiences can be made more relevant and meaningful to more people.”

Introduction

Following an attempt to attract a new audience for its traditional offerings, the San Francisco Symphony designed a second project to encourage amateur music-making throughout the Bay Area.

In 2006, the San Francisco Symphony was one of seven major California arts organizations awarded grants from the Arts Innovation Fund, a then-new initiative of The James Irvine Foundation designed to support innovation and change among the state's large cultural institutions. The Symphony's project focused on attracting and developing a new audience segment: young technology professionals in the South Bay. This ambitious project involved artistic programming adaptations, corporate partnerships, advice from a regional marketing taskforce, enhanced website and promotional capabilities, and concerts — some free of charge — in venues located in the target communities. Despite success with aspects of this multipronged strategy, by 2009 the Symphony reported to Irvine that the project had fallen short of many of its marketing and financial objectives.

The Symphony applied for a second Arts Innovation Fund grant in 2010 with a different proposal. Instead of seeking new audiences for additional concert offerings, the second project was designed to encourage amateur music-making throughout the Bay Area. Through this project, the Symphony provided non-professional adult musicians opportunities to play alongside Symphony members and even perform under San Francisco Symphony auspices. As this report was being written, the program's first events had attracted capacity crowds of amateur musicians from the Bay Area.

What happened? The difficulty the San Francisco Symphony had growing its audience in the South Bay during the first project had heightened the sense among the organization's leadership team that something subtle but important had shifted in the culture. Orchestras like the San Francisco Symphony were still held in high esteem by many in their communities, and many still acknowledged that their music was of the highest quality. But that esteem and high quality were no longer enough to draw new audiences to the organization or fuel an expanded concert schedule or geographic growth. The long-established criteria of success were showing their limits. The Symphony, like so many other arts organizations around the United States and elsewhere, realized that it needed to become more *personally* relevant and engaging, and to develop deeper, richer relationships with its community.

With its second Arts Innovation Fund grant, the Symphony focused on its relationship with the Bay Area community through what its director of external affairs called "a completely new method of enriching, serving and shaping our community's cultural life, bringing Bay Area musicians closer to the symphony, increasing empathy for the art form and communication with our musicians."

The program, dubbed Community of Music Makers, is fundamentally different from traditional audience development initiatives. Members of the Symphony's project team don't expect it to funnel people into the performance hall for regular concert offerings. Rather,

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they are trying to develop more personal, informal and relevant relationships with Bay Area musicians, because they realize that such relationships will be essential if the Symphony is to continue thriving in the decades ahead. Not coincidentally, they decided to build these new kinds of relationships through experiences that are quite different from the concerts the San Francisco Symphony has long presented.

In a sense, the story of the San Francisco Symphony's evolving innovation strategies is the story of the Arts Innovation Fund itself. Over the last three decades, virtually every realm of social life — from the media to education, from politics to religion — has shifted toward forms of public engagement that are less formal, less hierarchical, more social, more participatory, more personalized and more fully and easily integrated into everyday life. These shifts also influence arts audiences' expectations and preferences for cultural experiences. The gradual acknowledgement of this phenomenon is one way to understand not only the San Francisco Symphony's evolving innovation strategies but many other Arts Innovation Fund projects as well.

California's major arts organizations, like their counterparts elsewhere, realized that behind the attendance declines and financial struggles endemic to nonprofit arts lies a gap in relevance and value — a discrepancy between what arts organizations are offering and what is perceived as meaningful and valuable by the audiences, communities and artists they serve. The Arts Innovation Fund grantees took

a variety of approaches to closing this relevance gap. Not all of them chose participatory innovations like the San Francisco Symphony's second project. In fact, some told us that they thought such approaches went a step too far. But most experimented with opportunities for audiences and communities to do more than just witness an outstanding performance or exhibition. They created opportunities for people to become more personally involved in the work and enter the world of the arts and artists more fully than conventional programming allows. Others encouraged artists to create work that speaks to issues of contemporary relevance, even when that work might challenge traditional assumptions about "what sells." All were experimenting with new ways of doing business in a changing cultural environment.

There is another sense in which the story of the San Francisco Symphony is the story of the Arts Innovation Fund. By focusing less on the outcomes of a specific innovation project and more on fostering experimentation, adaptation and institutional learning, these projects created space for the Symphony — an institution already pushing the classical tradition in new directions — to take the risk of working in a very different way.

About this report

Through the Arts Innovation Fund, The James Irvine Foundation made multiyear grants for 28 projects by 19 of California's leading theaters, orchestras and art museums, as well as a ballet company, a performing arts center and an opera company. The grants were

made from 2006 through 2011, when the last awards were given for projects that will be completed by 2015. The 19 grantees are among California's largest cultural institutions: The smallest of the group reported annual expenses (in its most recent IRS filings) of about \$7 million — which was the minimum budget size eligible for the program — and the largest reported \$96 million. These organizations manage endowments as large as \$268 million. As big as they are, they are hardly immune to the challenges confronting the arts, including financial challenges. Thirteen of the 19 reported operating losses in those IRS filings, due in part to the recession that began at the end of 2007 and provided a challenging economic context for all of the Arts Innovation Fund projects.

The initiative's aim was to help grantees become better at adapting to, and taking advantage of, the broad cultural changes affecting the arts. Its method was to support not only the implementation of innovative projects but a process of reflection, inquiry and change *around* those projects that would deepen the organization's capacities. In the same spirit, The James Irvine Foundation's goal in commissioning this review of the program was also to learn: to find out how the grantees understood the challenges and opportunities facing them; to help identify the dynamics of change in arts organizations; and to distill lessons from the initiative that might help the field as a whole successfully manage the tectonic shifts shaping its future. This report is not an evaluation of the grantees' projects or of the Arts Innovation

This report focuses on the ways a set of cultural institutions made use of Irvine resources for innovation and change.

Fund itself. We did not assess whether the grantees achieved their objectives, though we were interested in their judgments about that question. (The answer was usually “in some ways.”)

Instead, we present a strategic assessment of the initiative and offer a bird’s-eye view of the key features and dynamics of the projects as a group, focusing on program-level patterns and on how this small but important set of cultural institutions experienced the Arts Innovation Fund and made use of the resources Irvine placed at their disposal for innovation and change. (Most grants in the initiative were for two to four years and averaged between \$200,000 and \$300,000 a year — substantial awards, but not huge given the operating budgets of these large organizations.) While this report describes only a small portion of individual projects in the interest of brevity, our analysis included careful examination of all of the Arts Innovation Fund projects, and the findings we identify reflect patterns across the entire group.

We began developing this report by reviewing relevant recent literature — articles, blogs, books and research reports — about new challenges facing the arts, emerging ideas and strategies to meet those challenges, and the dynamics of innovation and organizational change. We studied the large Arts Innovation Fund documentary record: Irvine’s guidelines, 28 grant proposals, 15 final and eight interim grantee reports, two audience research reports written by grantees, four internal memos on the

The conclusions, lessons and suggestions we make in this document are based on interpretation of this large body of mostly qualitative data about the Arts Innovation Fund.

initiative from Irvine staff to the Foundation's trustees, and six nuanced and candid documentation reports of the multiyear initiative from EmcArts, the New York-based consulting group Irvine engaged to work with Arts Innovation Fund grantees. We then conducted telephone interviews with leaders or senior staff at all 19 grantee organizations.

For additional context and perspective on the initiative, we interviewed 11 outside arts experts. This group included consultants and practitioners in California and beyond who have made important contributions to the discourse and practice of experimentation in the arts. Finally, we spoke with three additional experts who were closely and influentially involved in the Arts Innovation Fund: Richard Evans and Melissa Dibble of EmcArts, and Irvine's current Arts Program Director, Josephine Ramirez, who was formerly a grantee of the Arts Innovation Fund in a prior position at The Music Center (Performing Arts Center of Los Angeles County).

A list of people interviewed begins on page 66 of this report.

The conclusions, lessons and suggestions we make in this document are based on interpretation of this large body of mostly qualitative data about the Arts Innovation Fund.

This report begins with our [broad findings](#), followed by an exploration of what Arts Innovation Fund projects were, with an eye toward understanding how the grantees saw the [changing climate](#) in which they

operate and what they viewed as the most promising paths forward. Next, we examine how the [process of change](#) worked at the 19 organizations.

In the [conclusions section](#), we offer thoughts about the long-term sustainability of Arts Innovation Fund projects and their effects, along with recommendations to funders, cultural policymakers and others interested in pursuing innovation and change in the nonprofit arts sector.

Findings Overview

Many of the grantees had concluded that, at least for some members of their potential audience, their traditional programming was no longer sufficiently relevant, meaningful and valuable, and that they needed to catch up with contemporary culture in certain ways.

Gathered here are important findings from our review of Arts Innovation Fund activities. In the next section, we present greater depth on these findings and related analysis. Our first three findings concern what kinds of innovations the grantees pursued and why, while the remainder describe the processes and outcomes of their projects.

Organizational intent

1. **Most grantees hoped their innovation project would help close a growing “relevance gap” between themselves and new and existing audiences.** Some Arts Innovation Fund grantees had experienced decline in audience, and all were concerned by national reports of falling attendance across most art forms and of the financial woes faced by many arts organizations. They were also aware that public expectations and behaviors had changed in a society that was transforming technologically, socially, economically and demographically. And they were familiar with the fresh, sometimes radical, experiments and strategies that established and new arts groups were trying around the country. Many of the grantees had concluded that, at least for some members of their potential audience, their traditional programming was no longer sufficiently relevant, meaningful and valuable, and that they needed to catch up with contemporary culture in certain ways.

- 2. Some grantees hoped to close a relevance gap with their communities and neighborhoods.** A few organizations participating in the Arts Innovation Fund saw clear evidence that their status in the civic life of their communities had declined: They no longer commanded the public attention and support they once had. Others sensed that, despite earnest outreach efforts, they had never developed authentic relationships with large parts of their communities. These grantees designed innovation projects to forge new public value by addressing contemporary social issues more forthrightly, weaving their community's concerns or needs into the art itself, and by building working relationships with new community organizations. Some offered community members active creative roles in the artistic process. These projects went well beyond the boundaries of traditional "community outreach" programs, which for decades focused on giving "underserved" audiences access to conventional (and sometimes abridged or entry-level) programming rather than on participatory engagement.
- 3. A few organizations worked to narrow a relevance gap with artists.** These grantees were often focused on fostering more complex, diverse and challenging artistic work, which they often referred to as "edgier" fare. They moved artists closer to the center of their institutional identities, even in cases where the new, edgier

Organizations recognized that a time for more comprehensive change might come, but for the moment they were content to experiment with new practices in a “contained” way while continuing to do what they already did well for their core audiences.

work would be unlikely to find as broad an audience as the organizations’ more conventional programming.

Project process and outcomes

4. **Most grantees defined their projects in terms of incremental rather than revolutionary change.** Despite the importance of these challenges with audience, community and artistic relevance, Arts Innovation Fund grantees were generally successful with their traditional programming strategies and felt no urgency to change drastically. They recognized that a time for more comprehensive change might come, but for the moment they were content to experiment with new practices in a contained way while continuing to do what they already did well for their core audiences.
5. **Most initiative projects were developed and implemented as a “contained innovation” within the larger organization.** This structure protected the innovation from organizational resistance, pressures and distractions — and also protected the rest of the organization from the risks associated with the experimental project. At the same time, the contained nature of experiments may have limited the impact and sustainability of the projects within these organizations.
6. **Despite modest aims and protective structures, grantees found that change is hard.** Even well-contained projects entailed changing some of the fundamental assumptions

Grantees particularly valued the opportunity for group reflection, which they reported is in short supply during the usual course of business.

that have structured how arts organizations operate and think — about their art and programming, their audiences and communities, and their organizational structures. Arts Innovation Fund grantees were compelled to navigate interdepartmental conflicts, develop better communication and collaboration skills, secure trustee support and, perhaps most difficult, find time for reflection in inherently time-strapped circumstances.

7. **A coaching-centered approach to innovation was crucial in helping organizations grapple with the challenges of change.** The initiative's protocol of regular meetings with facilitator-consultants from EmcArts enforced high levels of internal reflection, collaboration, self-evaluation and revision. Grantees particularly valued the opportunity for group reflection, which they reported is in short supply during the usual course of business. At the same time, some grantees felt that EmcArts' focus on the processes of change, such as work with logic models and the use of an innovation rubric, may have demanded more time than was necessary.
8. **Implementing the innovation projects required grantees to change their organizational cultures.** Grantees found that leadership and staff had to adjust their ways of working together to become more communicative, more collaborative and less hierarchical. According to the literature on

Successful innovation projects had leaders who supported both the projects themselves and the associated changes to organizational culture.

organizational development, these qualities are strongly associated with organizational capacities for learning, problem-solving and exploiting new opportunities, so Arts Innovation Fund projects that generated these kinds of change are likely to yield long-term benefits to the participant organizations. Most grantees believed that these new capacities became permanent parts of their organizational cultures, even in cases where the innovation projects themselves have been dialed back at the conclusion of the grant period. It may also be true that the grantees reporting positive results from their innovation projects were those that had more collaborative, communicative and flatter organizations to start with. In other words, these organizational qualities may be both preconditions for change *and* positive outcomes of changing.

9. **Grantees that were most satisfied with their projects had leaders who were open and willing to learn, and who inspired staff to confidently face hard truths.** While Arts Innovation Fund projects may have flattened organizations to some extent, executive leadership still played a vital role. Successful innovation projects had leaders who supported both the projects themselves and the associated changes to organizational culture, and who modeled a dedication to learning, caring for staff and artists, collaborative problem solving, open communication, reflection and assessment — all without sacrificing institutional continuity

or putting the core programming and revenue model at risk. These executives were also good at balancing the role of the board in Arts Innovation Fund projects, keeping trustees informed yet limiting their direct involvement to protect the projects from sometimes cautious inclinations.

- 10. Several initiative projects continued after the grants ended, though many have been scaled back, indicating that innovation requires sustained capitalization.** As of this writing, many but not all Arts Innovation Fund grant terms have been completed. It seems clear that a few of the innovation projects have become — or were from their inception — part of a durable, holistic change in the organization’s public offerings and identity. The Oakland Museum, whose new Art of California gallery renovation was an Arts Innovation Fund project, is in this category, as is the Active Arts program of The Music Center and projects of the de Young Museum, Berkeley Repertory Theatre and the Hammer Museum. Yet the majority of the programmatic innovations supported by the initiative have been substantially scaled back or shuttered, or seem likely to be so after the grant period ends. This is not for lack of interest; these Arts Innovation Fund grantees were and remain seriously interested in their innovation projects, but just as they required dedicated financial support to launch them, they now require dedicated financial support to sustain them — support that could come from either

Just as they required dedicated financial support to launch them, Arts Innovation Fund grantees now require dedicated financial support to sustain them.

earned or contributed sources. The initiative's three- and even four-year grant terms were unusually generous, but despite the efforts of some grantees to develop new revenue streams from, or new philanthropic funding for, their projects, a few years does not appear to be a sufficient period for such projects to become self-sustaining and independent, particularly in difficult economic times. The dialing back of these innovation projects is not a sign of failure. The Arts Innovation Fund did not ask grantees to focus on the revenue side of their innovations, and developing new revenue streams was not a criterion for success. Nonetheless, the arts leaders we spoke to for this review were acutely aware of the economic realities facing their innovation projects in the long run. The fuel has to come from somewhere; innovation requires sustained capitalization of one kind or another.

The Motivations and Aims of Change

The internet and advanced consumer technologies have fundamentally altered expectations about information, consumption and production.

Throughout the 1980s and '90s, nonprofit arts organizations began seeing a gradual but widespread decline in attendance at arts events. Substantial forces, some long-simmering and much-discussed in the field, precipitated this decline. Children are less exposed to arts in schools due to reductions in arts education. The American middle class, which had been the source of growth of the nonprofit arts sector for much of the 20th century, has been shrinking. The work week has expanded and leisure time has declined. While most American art institutions have roots in European conventions and traditions, changing demographics have moved the American population away from a European majority and European cultural preferences. The distinctions between “highbrow” art and “lowbrow” or popular entertainment are eroding. Political “culture wars” have reduced support for the arts in some segments of the population. Participatory aesthetics and a do-it-yourself/maker culture are on the rise. And at the top of this list, perhaps responsible for some of the other developments, is the technological revolution. The internet and advanced consumer technologies have created new competition for people’s time and attention. More importantly, they have fundamentally altered expectations about information, consumption and production — including cultural consumption and production.

Arts organizations initially responded to these changes by ratcheting up their marketing capacities, hoping to remind audiences of what drew them to the nonprofit arts in the first place and to introduce themselves to new generations of consumers. They also enhanced their fundraising capacities to support their rapidly growing operating budgets. And they worked together to advocate for increased public sector support of the arts. Many of these efforts met with some success, but they only mitigated, rather than reversed, the audience declines. The most recent [National Endowment for the Arts](#) Survey of Public Participation in the Arts shows attendance declines in all the performing art forms from 1982 through 2008, and a decline for art museums after 1992.

In recent years, the dialogue in nonprofit arts has shifted to trying new things, such as hybrid art forms; new modes of presenting art; new levels and kinds of interaction among audiences, professional artists and artworks; new business models and so on. Innovation, change and adaptation have become the watchwords. To be sure, there are deep and genuine undercurrents of anxiety about this “new normal” in the arts, anxieties which can sometimes make it tempting for arts leaders to wish that everything would go back to the way it was in, say, the middle and later decades of the 20th century. But this is unmistakably a time of creative ferment. The last decade, especially, has seen a burst of fresh thinking and experimentation about how to respond to these broader changes in our society with truly new ways of “doing” the arts.

The Arts Innovation Fund has been a kind of real-time laboratory for organizations to develop, implement, reflect on and refine their best ideas for how to stay relevant in the changing world around them.

It is against this backdrop that The James Irvine Foundation Arts Innovation Fund was launched in 2006, ultimately providing financial support and consulting assistance to 19 California arts organizations to join — or make further strides in — that wave of experimentation and change. By making the word “innovation” literally the middle name of the fund, Irvine signaled that its purpose was not to support organizations in doing what they already did with greater vigor or efficiency. It was to help them develop *new things to do*: new artistic experiences, new ways of engaging audiences, and new kinds of relationships with communities.

The Arts Innovation Fund has been a kind of real-time laboratory for these organizations to develop, implement, reflect on and refine their best ideas for how to stay relevant in the changing world around them. The projects reveal a great deal about how arts organizations understand their challenges and opportunities within contemporary culture and about what they view as the best pathways for their own internal growth and change.

Interviews with initiative grantees suggest that most understood their primary challenge as a widening gap in relevance between their organizations and their audiences and communities. (Grantees did not use the term “relevance gap” themselves; it is borrowed from one of the outside arts experts we interviewed during the research process.) That is, they saw a growing divide between their traditional program offerings and the expectations, inclinations and behaviors of

Some grantee organizations saw the relevance gap less in terms of the audience's personal response to the organization and more in terms of perceptions and relationships within their communities.

their audiences — and this was especially true of audiences they *hoped* to reach. The grantees tried to narrow this gap in personal relevance with what they referred to as “audience engagement” techniques: projects designed to create richer audience encounters with art and make the overall arts experience less unidirectional and more active, dynamic, social, open and informal than traditional evenings at the theater or afternoons at the museum. The social aspect of these projects was particularly prominent. It included direct exchange of ideas and feelings both between the professional artists and audiences, and among the audience members.

Some grantee organizations saw the relevance gap less in terms of the audience's personal response to the organization and more in terms of perceptions and relationships within their communities. They realized that their arts institutions were no longer widely viewed as civic assets in the imaginations of their local publics, or even in some cases by the professional and amateur artists who would seem to be a natural constituency. These grantees' projects were efforts to provide a productive and meaningful space for addressing contemporary social issues, or to bind and build communities and support civic life *through* art. They implemented *community engagement* projects rather than *audience engagement* strategies, sometimes offering community members — many of whom belonged to socioeconomic or ethnic groups that historically have been underrepresented in those arts organizations' paying audiences — direct and active roles in the art-making.

Some organizations sought to close an *artistic relevance gap* by recharging their relationships with professional artists.

Still other grantees believed that, in their pursuit of larger audiences, they had lost touch with the uniquely valuable — often critical — perspectives of professional artists. These organizations sought to close an *artistic relevance gap* by recharging their relationships with their affiliated artists, developing programs that focused more explicitly on the artists' own concerns and passions, activating artists as key decision makers in institutional planning and focusing on artists as an important segment of the target audience. Many of these projects intended to generate “edgier,” more artist-centered work. The grantees believed that these projects would ultimately engage new audience segments, but audience engagement was not the primary motivation for undertaking these projects. For an arts organization, they argued, relevance must begin with the art.

In practice, the lines separating these three goals — closing the personal, community and artistic relevance gaps — are dotted at best. Yet they offer an organizing framework in which we can explore the diverse projects that the 19 grantees (eight museums, five theaters, three orchestras, a performing arts center, a ballet company, and an opera company) undertook. The focus of this section is on what they did and why they did it.

Closing the audience relevance gap

Thirty years ago, most arts leaders believed that exposing newcomers to high quality, highly professional arts experiences (such as performances and exhibitions) would transform them into arts

Exposure to excellence is not enough, for the simple reason that artistic excellence is no guarantee of success with today's audiences.

consumers. “If we can get them in the door and let them see how wonderful this is,” it was often said, “they’ll come back for more.” But recent research, including a few studies commissioned as part of Arts Innovation Fund projects at both performing arts organizations and museums, suggests that this thinking is naïve. Exposure to artistic excellence is not enough, for the simple reason that artistic excellence is no guarantee of success with audiences that crave emotional resonance and personal meaning, active engagement or participation, and, in the words of one grantee’s proposal, “real-time, human interaction that leads to a deeper connection to and dialogue about art.” Today’s consumers want new forms of engagement; excellence may be one component in the experiences they seek, but they define the value of those experiences in experiential and holistic, rather than strictly aesthetic, terms. As the executive director of a theater grantee told us during an interview: “People, especially young people, want more than a couple of hours in the dark.”

Many Arts Innovation Fund grantees acknowledged that some members of their audiences — perhaps an increasing proportion — were finding that traditional arts experiences no longer matched their expectations and preferences. “We’ve seen the attrition,” another theater grantee said, “and we know we are going to have to change. The noose is tightening.”

What was necessary, they felt, was building more compelling programs and deeper relationships with their audiences through a set of new or updated

The Arts Innovation Fund portfolio suggests that making audiences more engaged entails making arts experiences more transparent, social, active, thought-provoking and personal.

strategies that most of the grantees referred to categorically as “audience engagement.” (A recent paper by Alan Brown and Rebecca Ratzkin offers a useful overview of these strategies.¹) Of course, audience engagement programs are not the only way to close that gap; the Arts Innovation Fund also offered support for innovations in artistic capacity and organizational management. But audience engagement was the preferred course of most of the Arts Innovation Fund grantees. Initiative-funded projects embraced a variety of practical approaches to audience engagement that reflected their organizational personalities and insights about what their audiences would consider genuinely engaging.

Most audience engagement projects in the Arts Innovation Fund were designed to deconstruct the walls that, by longstanding convention, separate the audience from the artists, performance or artwork. Nearly all of them supplemented cognitive and professional introductions to the art with efforts to reduce the formality and increase the sociability of the arts experience, all to the end of helping audiences feel and enjoy a human connection to the artwork and its creators. The Arts Innovation Fund portfolio suggests that making audiences more engaged entails making arts experiences more transparent, social, active, thought-provoking and personal. Such experiences lead people into the world of the art work and its creation, making them less like “tourists” in the arts venue and more like “family members.” They invite the audience members’ ideas, questions and

¹ 2011. Brown, A. and R. Ratzkin.
[*Making Sense of Audience Engagement: Volume 1.*](#)

Commissioned by The San Francisco Foundation and Grants for the Arts with the support of The Wallace Foundation.

Traditional curatorial lectures and audio guides were complemented by informal social gatherings and highly interactive elements — from virtual exploration to hands-on art-making.

opinions during and immediately after the experience. And they prompt audiences to continue to reflect, think and talk about the arts experiences after they are over.

For example, performing arts grantees expanded the idea of preparatory programming beyond traditional program notes. They used the internet and social media to communicate with audiences in broader, more humanized and more dialogic terms. Video clips from rehearsals or interviews with professional artists and curators were complemented by emails and links to reviews or features in the media about the artwork or the issues it explored.

Of course, different art forms impose different kinds of limitations and offer different opportunities for engaging audiences at the time and place of the arts experience. Museum grantees of the Arts Innovation Fund introduced a range of interactive, experiential and social options for visitors; the traditional curatorial lectures and audio guides were complemented by informal social gatherings, often with food and drink, and highly interactive elements — from virtual exploration to hands-on art-making. Performing arts organizations developed a range of offerings immediately before and after performances. The Los Angeles Philharmonic's initiative-funded project integrated musical programs with broader theme-based humanities programming. Several theaters held formal post-show discussions with cast members or experts as well as informal social gatherings in their lobbies. One theater recorded short video reviews by audience members and selected

One theater recorded short video reviews by audience members and selected some of the recordings to play on the company's website.

Grantees faced the challenge of making their programs more relevant to more people without alienating the traditionalists already attending by giving audiences choices about their levels and kinds of participation.

some of the recordings to play on the company's website. That theater also placed staff "concierges" in its lobby after performances and during intermissions to facilitate quiet conversations with people who were struggling with difficult work.

Audience engagement strategies were both educational and social. They tended to focus on helping audiences understand the ideas and aesthetics of performances or exhibits as well as connect with each other and with the organization's staff and artists. In the case of art that addressed difficult or controversial social issues, engagement activities sought to contextualize the perspective of the artist on the spectrum of opinions about that issue, or to give audience members a chance to talk about their own perspectives on the issue. In some cases, engagement projects included hands-on creative experiences with a professional artist. When done well, these experiences give audiences a taste of the excitement of making art, expressing themselves and learning (often in a hands-on way) about the processes and strategies artists use and how artists think and feel.

Arts Innovation Fund grantees were well aware that their audiences are varied, not monolithic. Some audience members found the new engagement approaches objectionable. So the grantees faced the challenge of making their programs more engaging and relevant to more people without alienating the traditionalists who were already attending. This was often accomplished by giving audiences choices about their levels and kinds of participation.

Museum grantees were particularly pleased that their efforts appeared to be paying dividends: A greater number and diversity of people were coming for the exhibitions and the many events and programs organized around them. Theaters also indicated that their engagement efforts attracted newcomers, especially younger audiences. “A quarter of our audience is now under 30,” one theater manager happily reported. (Precise quantitative data on Arts Innovation Fund audiences were not available for this review.)

These results are indeed promising. But it’s worth noting that the audience engagement projects in the initiative portfolio were constructed around programming that, in its most important respects, is consistent rather than discontinuous with the traditional offerings and competencies of the grantees. Whatever else may have changed, the plays, operas, dance and music concerts, and exhibitions at the core of the audience engagement projects were the same ones that the organization presents to its regular audiences. The projects did create opportunities for audiences to engage with that programming differently — more actively, socially, intensively and informally. But they did so largely by adding new dimensions and features to the underlying structure of the arts experience. This difference is clearly valuable to some arts audiences, and it may close the relevance gap for them. It is simply too early to tell, though, whether the kinds of audiences, and the kind of engagement, that arts organizations are hoping to

build can be sustained with changes to the “outer rings” of the experience. Will it also be necessary to change the “core” of the experience? Will more fundamental changes be necessary to broaden the appeal of the arts to more, and more kinds of, Americans? These questions are not hypothetical; they are raised both by these audience engagement projects and other kinds of experiments within the Arts Innovation Fund.

Closing the community relevance gap

There is a long tradition of using the arts to advance civic and social ends, and a much longer tradition of the arts serving as the focal point around which communities come together, make sense of their individual and collective challenges, and find spiritual, emotional or social sustenance. These traditions were at the heart of the arts programs in America’s settlement houses, which connected the arts to social reform a century ago. They moved through the New Deal-era Works Progress Administration arts programs and into the community arts movement, which has re-emerged in recent decades.

Some Arts Innovation Fund grantees developed projects that belong to these traditions, designing and implementing programs that bind the community and the organization together in new ways and address issues of deep significance to the geographic community in which they sit. These organizations are, implicitly, thinking of “community” not as synonymous with “audience” (or even “potential audience”), but as people who are ethnically,

Two orchestras created opportunities for their highly trained musicians to get together with amateur musicians from around the local region to play and sing.

socioeconomically or generationally distinct from their core audience — and who have been historically alienated from the institutional arts. As a result, these community engagement projects were not conceived of as “gateway” programs (meant to introduce a new market segment to the organization, with the end goal of attending core programming), nor as traditional outreach programs (meant to make core programming more accessible to the “underserved”). Instead, they were conceived as opportunities for community members to participate with the arts organization *on their own terms* and on a fairly equal footing.

For example, two symphony orchestras in the portfolio developed projects to bind the community and the organization together by blurring the once-sharp line between performer and audience. They created opportunities for their highly trained musicians to get together with amateur musicians from around the local region to play and sing. In a similar vein, The Music Center, a performing arts center in Los Angeles, launched a popular series of programs called Active Arts, in which amateur and semi-professional musicians and ensembles from the community make music on The Music Center campus. The program is now being expanded to several YMCAs around Los Angeles. “It’s not about the 1 percent who get paid to play at the top,” the project director explained to us, “but the folks who play for themselves, without being paid.” Only a

One theater developed new plays with community residents, taking their lives as the inspiration for the work.

small proportion of participants in these community programs are also audience members for the organizations' regular performances.

One grantee took this kind of thinking further, developing artistic collaborations with the community while explicitly addressing issues of genuine importance and relevance to local residents. The Old Globe had moved its scene shop, where the technical components of its shows are built, to a new facility in a low-income area of southeast San Diego where the theater had virtually no prior relationships. It developed a new education program at the local high school and provided internships at the scene shop for a few students. (Significantly, one intern has been hired to work full-time at the company.) The organization also developed new plays with community residents, taking their lives as the inspiration for the work. Working with "emancipated" foster children — those who have aged out of the foster care system and face life on their own at 18 — The Old Globe developed a play called *Emancipation*. After a powerful staged reading, the piece is now being considered for further development and production. In an even larger community project, the company produced *Odyssey*, a musical adaptation of the Homeric epic told "through the eyes of contemporary San Diego." It featured local church choirs, a hip-hop dance group, a youth symphony and a cast of 200 — only three of whom were professional actors. *Odyssey* sold out when performed in a large outdoor amphitheater in San Diego's biggest park.

These Arts Innovation Fund grantees didn't expect that such programs would inspire community residents to flock to their conventional performances. Nor did they see these programs as a replacement for the professional theater, music and dance that takes place on their stages. But such programs do provide a forum in which the organizations can engage with their communities in more collaborative, creative, informal and authentic ways. They make a loud statement that the arts institution values the identities, talents and perspectives of community members whether or not they show up for conventional arts experiences.

Some of these grantees did see the potential for a more porous boundary between community engagement programs and the organizations' core artistic products. However, they didn't assume that the relationship would work in a linear way — from people participating in community collaborations to then attending standard mainstage programming. Instead, they saw an opportunity for the core programming itself to shift and become more responsive to the needs and identities of the community. The Oakland Museum of California, perhaps the best example of this approach, conducted research to identify and develop participatory and interactive experiences that visitors and community members who had never been to the museum would value. After a series of major exhibition renovations throughout the museum — including the reinstallation of the Art of California galleries, which was the

museum’s Arts Innovation Fund project — attendance has significantly diversified. “It’s not just for California art aficionados any longer,” the museum’s director said in an interview.

Closing the artistic relevance gap

While most grantees described their projects as efforts to become more audience- or community-centered, a few approached their innovations from a different direction and focused on the role and freedom of the professional artist. These organizations saw the Arts Innovation Fund as an opportunity to stretch the boundaries of programming in more challenging directions and thereby redefine the kind of work that they produced or exhibited. Some intended to make the very identity of the institution more artist-driven.

For instance, more than one grantee designed its project in response to a growing sense that the institution’s success in building large, loyal audiences had paradoxically dampened its ability — indeed, its impulse — to present complex, challenging programs. One theater manager explained, “Subscriptions have committed us to program for a broad-based and traditional middle-of-the-road audience. They define the art that is allowed and the parameters of presentation. They drive the artistic decisions of the company.” The opera grantee found that its audience was receptive only to “the top five operas.” Another theater leader told us, “The subscription model isn’t working well on several levels, but most important, it isn’t working well on an *artistic* level.”

The subscription model isn’t working well on several levels, but most important, it isn’t working well on an *artistic* level.”
—Theater Leader

Art museum grantees took a more identity-based approach, bringing professional artists (not just artworks) into the museum through residencies, installations and artist advisories of various kinds.

These grantees used their Arts Innovation Fund projects to produce and present work that they described as edgier than their usual fare, often presenting it in smaller or non-traditional venues. For some of these productions, single-ticket sales, not subscriptions, accounted for most seats.

The art museum grantees brought well-regarded artists (not just artworks) into the museum through residencies, installations and artist advisories of various kinds. One redefined itself fundamentally as “artist-centric,” deploying an artists’ council as its primary feedback resource for ideas about programming and the future of the institution (a role usually reserved for trustees). Another “realigned the community’s perception of the Museum” by “welcoming the disparate, and even oppositional, voices of the local artistic community to respond to and engage with the art on display in the galleries.” Because art museums traditionally have been focused on the display of art objects, making artists more prominent in museums is a significant change. It asserts the human dimension of art-making, changing the visitor-object relationship into something more social and introducing the process of creativity — not just the *products* of that process — to museum audiences.

In that sense, some of these artist-centric approaches align closely with the audience engagement work described above. Most of the grantees that focused on artistic innovation believed that becoming more artist-centric is a viable strategy for engaging the public, but deepening audience engagement is not

their foremost goal in undertaking the projects. “We are a public-minded institution,” one museum director told us, “but we don’t use the public as our measure of success. We’ve built ourselves around a core audience of artists... After the artists decide that you’re worthy, then the art world follows, and finally the general public. But the general public is in the outside ring. Most institutions start at that outer ring.”

Other experimental approaches

A couple of Arts Innovation Fund projects stood more or less outside of these three broad categories. The initiative’s one opera grantee and one ballet grantee may carry heavier burdens of tradition than their peers in other art forms. The San Francisco Ballet focused primarily on growing its audience through media- and internet-based engagement rather than the in-person, in-venue engagement strategies pursued by other grantees. It was the only grantee to embrace the potential of new media to open new revenue opportunities and substantially change how the organization operates. The company produced one high-definition video ballet performance during its Arts Innovation Fund project and is now looking for distribution opportunities that could become a significant new revenue stream.

San Diego Opera, on the other hand, attempted to draw larger audiences to less well-known operas by raising production values and capitalizing on talented celebrity directors. In a stroke of unfortunate timing, the first of the Metropolitan Opera’s HD Live broadcasts was distributed in San Diego during the

same period. The Met's productions are screened in movie theaters, and ticket prices are much lower than for live opera. San Diego's director of strategic planning acknowledged that southern California opera lovers "can see a Met production at a local movie house for \$17, go in their shorts and eat popcorn during the show. Or, in a tough economy they can pay \$275 a person for a ticket, parking and dinner. People think twice or not at all about that."

The Processes and Challenges of Change

Most Arts Innovation Fund organizations were not facing the kind of serious, immediate challenges that demand fundamental change.

² We note here that The Museum of Contemporary Art, Los Angeles is the obvious exception. Its financial struggles and board and staff turmoil have been well documented in the media over the last several years. The museum's Arts Innovation Fund project was not directly tied to these issues.

Having looked at why Arts Innovation Fund grantees chose to innovate and change, and what kinds of changes they chose to try, we now turn to *how* they changed. This section addresses what the process looked like and what obstacles the organizations encountered. These program-level observations are based on interviews with the leaders of grantee organizations and their own reports on their work.

Incremental change, not a revolution

The 19 Arts Innovation Fund grantees are all large arts institutions with long track records of success. They are deeply respected by their peers in California, and in many cases nationally and internationally as well. Their leaders are experienced, capable and savvy professionals who keep up with ideas and trends in the field. Although they are well aware of the vulnerabilities of the nonprofit arts sector and hardly see their organizations as immune, they are somewhat protected from the forces affecting smaller or newer arts organizations by their large and loyal audiences, strong artistic reputations, seasoned and skilled staffs, remarkable physical assets, relatively solid balance sheets and substantial support from individuals and foundations. Most of these organizations were not facing the kind of serious, immediate challenges that demand fundamental change.² The ideas and practices that made the organizations successful in past decades are still working, at least to some extent and for some audiences. While these arts leaders know that they

may one day face “crisis” conditions that necessitate drastic change, that time has not come.

For all these reasons, Arts Innovation Fund grantees largely took a cautious approach to change. They thought hard about it. They questioned existing assumptions about how they do business and present themselves to the world, and their initiative-funded projects were distinct from business-as-usual in significant ways. But they were careful to define these experiments in limited, incremental terms — and not to think of them as a fundamental overhaul of the organization. In fact, most of the grantee representatives we spoke with see such caution as their duty. They feel they need to be vigilant to protect their assets and preserve the current model as long as it continues to serve the organization’s mission and audiences — while also experimenting, peripherally but creatively, with what a new model might look like. It’s a tricky dual mandate. For the moment, there are good reasons for large arts organizations *not to change* dramatically.

Financial realities also play a role here. None of the innovations became a self-sustaining revenue source, at least during the grant period. Grantee organizations’ business models are premised on their existing programming strategies, not on innovation. Moreover, though the grantees are all relatively well funded (and some have large endowments), like most nonprofits they do not have capital that they feel free to risk on experimentation and innovation. Their high fixed expenses (staffs, facilities and production

Arts Innovation Fund grants provided welcome risk capital that these organizations did not have access to within their operating budgets or from other sources.

Grants enabled some organizations to do important research on audiences and potential audiences, make organizational changes to improve efficiency and make complex strategic decisions that they had been contemplating for some time.

or programming) leave them little flexibility from year to year to undertake research, development and experimentation outside of their normal production schedules. Arts Innovation Fund grants provided welcome risk capital that these organizations did not have access to within their operating budgets or from other sources.

This is not to say that the grantees lacked *ideas* for innovation. On the contrary, most already had a number of creative projects in mind — a few of them “shovel ready” — when The James Irvine Foundation launched the Arts Innovation Fund in 2006. Many of these were ideas that leaders and staffs had seen implemented elsewhere in the field and were eager to try at their organizations, often with a local, original twist. The Arts Innovation Fund helped jump-start that thinking and turn it into action. The grantees would not have moved as quickly or been as ambitious with their innovations if they had to invest their own money or drum up philanthropic support from scratch (which would have put the innovation projects in competition with the institution’s other ventures and general operating needs). The grants enabled some organizations to do important research on audiences and potential audiences, make organizational changes to improve efficiency, and make complex strategic decisions that they had been contemplating for some time. Most of all, Arts Innovation Fund support enabled organizations to conduct programming experiments to help them learn how to close the relevance gaps with audiences, communities and artists.

It's worth noting that some of the outside arts experts we interviewed for this report were less sanguine than the grantee leaders about the current state of the arts or the viability of existing models. They saw greater urgency for change, even (or especially) at large institutions. One told us, "There is risk involved in change, but there is far more risk in *not* changing." To some extent, this contrast in perspectives is structural. Consultants, and service organization leaders and funders, look at the arts through a wide lens, as an ecosystem — and they see an ecosystem in trouble. Leaders and managers of individual arts organizations look through the lens of their institution's interests, opportunities and risks. While the grantees we spoke to are clearly capable of assessing the big picture, most of their energies are focused on the demands of producing a steady flow of artistic offerings. Their continued ability to meet those demands at a high level for appreciative audiences is, for them, the clearest indicator of organizational health and stability.

Contained innovation

Breaking with traditional ways of thinking and working is hard to do, and perhaps even harder to sustain. "I thought this would be challenging for the first year or so and then everyone would get it," said the director of The Music Center's Active Arts program. "Boy, was I wrong! What we're trying to do with Active Arts is turn the hierarchal pyramid of the arts upside down. Turns out that is incredibly hard and continually challenging work." Those pyramids,

Projects were “contained” for protection from outside pressures while they matured. This also protected the rest of the organization from risks involved in experimentation.

with “high” professional art up here and “popular” entertainment and amateur expression down there, were not built in a day, and it takes time to challenge them and construct alternatives. It’s a difficult task to undertake, especially while simultaneously sustaining a high level of conventional programming based on the old pyramid. So there is little mystery about why large arts organizations often resist, or at least take a cautious approach to, change.

Most Arts Innovation Fund projects were protected from that resistance by being kept somewhat isolated, programmatically and organizationally, from the rest of the institution. One expert on organizational change interviewed for this study referred to this protective practice as “contained innovation.” Projects were placed, in effect, in semi-isolated containers to protect them from outside pressures while they took root and matured. Contained innovation also protected the rest of the organization from some of the risks involved in experimentation and change. It allowed the grantees to make mistakes, learn from and reflect on their work, make adjustments and adaptations, and, ultimately, assess the project’s potential value.

In the corporate innovation literature, the real test of such a strategy is whether the innovations can eventually survive outside of the container and spread throughout the organization. Or, to use a more familiar metaphor, if the innovation needs to begin on an “island” of its own, the question is whether it will eventually cross a bridge back to the “mainland.”

For the most part, the grantees themselves did not conceive of their projects as incubators of new models for the whole organization.

For Arts Innovation Fund projects, it simply may be too early to tell whether the projects are ready to make that move to the mainland — to influence how the organization thinks about its core offerings. Even three- and four-year grants are not necessarily long enough to move a serious innovation from its protected domain on the margins of an organization's work into the heart of its practice.

But perhaps that bridge back to the mainland shouldn't be the standard of success we apply to Arts Innovation Fund projects. For the most part, the grantees themselves did not conceive of their projects as incubators of new models for the whole organization. They designed them as *complements* to the dominant model. In other words, these projects were not meant to be organizational revolutions in embryonic form, but rather experiments with how radical ideas could be woven into the fabric of institutions without threatening or disrupting the core values and programs that were the foundations of their success. So the real question may be whether these organizations can manage and benefit from that diversity of values and programs over time.

The challenge of change

It's axiomatic that change is hard. Even though the scope of change was limited, incremental and contained in most Arts Innovation Fund projects, the grantees nevertheless encountered many of the anxieties, uncertainties and organizational challenges that accompany any change process. New undertakings can lead to workload issues and resource or strategic conflicts within organizations.

Competition for authority among departments, which is common in large, hierarchical institutions, is often exacerbated during moments of change.

Much of the inter-departmental tension experienced by grantees was connected to the role of education departments. As the unit traditionally charged with building relationships with communities and extending the audience experience beyond the core artistic encounter, education departments were a natural choice to lead many of the Arts Innovation Fund projects. For the educators, the projects were an opportunity to find new purpose and strategic voice within organizations in which they've historically been lower on the totem pole. But there was sometimes frustration or resistance on the part of artistic staff, who were concerned that artistic standards might become secondary to audience development or to a new focus on community. For different reasons, marketing and development staff also sometimes resisted programmatic changes because they would require new messaging and fundraising strategies. And technical departments, which require precision and clarity to meet the demands of tight production calendars and even tighter budgets, were sometimes unhappy with the messy ambiguity of new programmatic initiatives.

Trustees were usually described as supportive of the innovation projects, although they were typically quite removed — often by design — from decisions about them. Primarily concerned with fiduciary responsibilities, trustees are often perceived by staff leaders as organizational anchors: necessary for

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stability but an obstacle to moving in new directions. Funding from Irvine helped validate the innovation projects in the eyes of trustees, forestalling or dampening concerns that might have been raised about the wisdom of these sometimes radical initiatives. As one grantee leader candidly told us: “If I went to the board and asked for \$1 million for [this kind of project], they’d ask what the revenue implications would be. And they’d probably not be inclined to do it because the possibilities are so limited. Support for change *must* come from outside sources like foundations.” Moreover, the usual conservatism of trustees was probably intensified by the recession that descended on the country soon after the Arts Innovation Fund was launched. So for the most part, trustees were kept outside of the innovation container, but were provided with routine reports on how the projects were proceeding.

Coaching as a strategy for change

The process EmcArts facilitated for Arts Innovation Fund grantees focused on developing a set of organizational capacities for innovation. The consulting firm’s view was informed in part by literature on organizational change that stresses the importance of creating cultures that value learning and inquiry. So the process was designed to help build habits of mind and organizational cultures that value the spirit of inquiry and tolerate the ambiguity essential to innovation. EmcArts assigned an individual consultant to work with each grantee over the life of its project. The consultant’s job was

One organization said consulting “was like having an organizational therapist who kept us in dialogue and demanded constant reflection. It was exhausting... but we got incredibly valuable feedback and it forced us to keep thinking, talking and learning.”

to facilitate and coach the grantee on the dynamics of organizational development and help staff reflect critically on their experiences.

The process involved the development of a logic model or “theory of change” for each grantee’s project and the use of an innovation rubric to help grantees assess their developing capacity for innovation. The logic models were refined and amended with help from EmcArts as the projects developed, then were used to facilitate mid-course evaluations of progress toward goals. EmcArts also organized several joint gatherings of the grantee teams over the years of the grant, usually held on-site at one of the grantee organizations, as opportunities for the teams to learn from each other.

Most of the grantees told us that the work of EmcArts added great value to their projects. One said, “It was like having an organizational therapist who kept us in dialogue and demanded constant reflection. It was exhausting. We’d roll our eyes about some stuff, but we got incredibly valuable feedback, and it forced us to keep thinking, talking and learning.” Regular sessions with the EmcArts consultant helped the innovation teams pull together, cross-pollinate ideas and energy, and become more purposeful. The simple fact that they were accountable to meet with EmcArts twice a year changed the dynamic. “Emc forced us to look regularly at what we were doing. Most of the time we don’t reflect on what we do,” said one grantee. In at least one case, EmcArts helped a grantee understand its own goals far more deeply. “They

helped us understand that we're not looking for an excellent musical result in this work but an excellent educational experience," said a representative of that organization. "That's a completely different measuring stick. Understanding that brought us together and made us way more productive."

The built-in opportunity for reflection was an aspect of the Arts Innovation Fund process that the grantees appreciated unanimously. They told us that they simply don't have time for reflection in the normal course of business and that it was refreshingly valuable to their innovation work. It may seem odd that arts organizations would find it difficult to integrate the kind of reflection and self-evaluation that is essential to creative practice and used routinely by artists themselves.³ But it makes sense given the constant demands of programming and production, which can overwhelm the best intentions of leaders and staffs to work more reflectively. There are few other enterprises that introduce as many "new products" in a single year as major arts organizations. As a result, time, perhaps even more than money, is in short supply. So the self-analysis undertaken in the meetings facilitated by EmcArts, and the process of thoughtfully reviewing the dynamics and progress of the innovation projects, were somewhat foreign to the grantees' management teams. But doing so proved invaluable, because reflection is an essential element in the process of navigating the new and making change happen.

³ The idea of adapting artistic processes for management applications in arts organizations may be getting more serious attention. While it is not a new idea, it has not been widely practiced. See, for example, [All Together: A creative approach to organizational change](#), by Robert Hewison, John Holden and Samuel Jones, a report on how the Royal Shakespeare Company adapted the theatrical concept of ensemble to reorganize the entire organization.

While a few grantees noted that they sometimes wished the individual consultant assigned by EmcArts to their project had been more knowledgeable about the unique demands of their particular art form, most did not expect or want the consultants to help them run their museum or orchestra. They needed help *changing* their museum or orchestra, and they found the emphasis on the processes and dynamics of change and the access to professionals with wide experience in managing change very valuable. It is clear that the consulting process was a crucial support to organizations confronting new questions and challenges in the Arts Innovation Fund.

Evolving skills and cultures

Many of the challenges that Arts Innovation Fund grantees described concerned the very capacities that the innovation literature suggests are necessary for innovation and creativity. The grantees noted that their departmental structures were siloed, leading to difficulty in communicating and collaborating across departments, while the literature suggests that creativity is a highly social enterprise, facilitated by diverse perspectives and ideas, supported by free and open exchange, and enhanced by ongoing and iterative critique and revision. The grantees reported that internal hierarchy often left junior staff with limited responsibilities, opportunities and voice in decision making, yet the literature suggests that flatter organizations with fluid formal and informal lines of communication are generally more creative

The process of innovation led Arts Innovation Fund organizations, in varying degrees, to become less hierarchical, more communicative, more collaborative and more informal.

and innovative, and that the creative process is compromised by bureaucracy, hierarchy and social homogeneity.

Going through the Arts Innovation Fund process gave many grantee organizations an opportunity to build new muscles. To varying extents, they became flatter and less hierarchical, more communicative, more collaborative and more informal — a bit more like the technology startups that leap to mind when one thinks of nimble, innovative enterprises. The way authority is deployed and conveyed within the Arts Innovation Fund organizations seems to have changed in subtle but important ways.

The new internal skills and relationships that some Arts Innovation Fund organizations developed made them feel better prepared to take advantage of opportunities in the future. Some organizations significantly enhanced their digital capacities, improving the interactivity and content of their websites, developing a presence on social networking sites and better integrating marketing and fundraising with their web presence. But the most valuable developments may have been less about particular skills and more about a sense of organizational agency and potential. The Arts Innovation Fund experience gave these grantees more confidence that they could change and take on new and ambitious projects, and it helped them realize that the culture they had created did not automatically define the future they could have.

Leaders provided guidance, support and oversight. They empowered the innovation team, gave their blessing to the project and protected it from resistance in the rest of the organization.

Leadership and change

In some cases, Arts Innovation Fund projects were driven by senior leadership and the project team was built around the leader. In others, senior leadership was far less involved. But in the great majority of projects, the organizations' leaders played an important strategic role as champions of the work — and of the new values it represented. They provided guidance, support and oversight. In effect, they empowered the innovation team, gave their blessing to the project and protected the team and the project from resistance in the rest of the organization. In this way, leadership helped create the innovation container. Some leaders helped assemble the project team, which often comprised primarily junior staff; maintained open lines of communication between the “island” project and the “mainland” programming; and helped to resolve resource, strategic and philosophical conflicts both within the team and between the team and the rest of the organization. Most important, perhaps, these leaders modeled interest in, and commitment to, the project for the rest of the organization, demonstrating a willingness to learn, inspiring staff with confidence to face difficult truths and projecting a sense of hopeful optimism so that, as one interviewee put it, “the truth never becomes a burden.”

Even when leaders weren't entirely committed to the substance of the project, they were enthusiastic about the potential effects of the innovation process for their organizations. One said, “Innovation is

really healthy, and it will strengthen the orchestra... One or two VPs may be uncomfortable with this, but in terms of idea generation and program design, it's good to empower the younger staff." A theater director said that the innovation project gave junior staff more authority and prominence. "It's a thrilling opportunity to make room for another generation of leadership in the organization. There's a sense now that this is a place where a younger generation can have some power."

Conclusion and Recommendations

Innovation, adaptation and change have been at the center of human life and progress throughout history. But in recent years they have become beacons (as well as buzzwords), perhaps because we sense the historical significance of the digital revolution and perhaps because we realize that the global challenges we face are resistant to conventional solutions. The times inspire and demand new thinking. Of course, innovation and the arts are hardly strangers. Artists themselves have innovated since the earliest cave paintings and stone flutes. The nonprofit arts system that is central to the arts in America today was an innovation in the late 19th and early 20th centuries — and it is that system that now requires another round of new ideas in order to adapt and survive. The projects funded through the Arts Innovation Fund are in some sense a representative sample of how major arts organizations are responding to that imperative. So this report is an opportunity to think broadly about the impetus, purview, process and outcomes of adaptive change in the arts. In this concluding chapter, we offer thoughts about the lessons we see emerging from the program and several recommendations that may be helpful to policymakers, funders and others interested in promoting change in the arts.

One natural question about the Arts Innovation Fund is: How sustainable will the grantees' innovation projects be? Yet in that question lurks a paradox,

Arts organizations are seriously and actively investigating a fundamental question: How can we create arts experiences that have more relevance and meaning for more kinds of people?

or at least a tension between the idea of innovation (with its emphasis on experimentation and change) and the idea of sustainability (with its emphasis on steadiness and durability). Whether in the sciences or a corporate research and development incubator, experimentation entails failure. Moreover, it requires that “failure” be seen as a positive outcome, since it helps answer the question at hand. At arts organizations today, that question seems to be:

How can we create arts experiences that have more relevance and meaning for more kinds of people?

The Arts Innovation Fund projects suggest that nonprofit arts organizations, including the largest and most prestigious among them, are seriously and actively investigating that fundamental question.

From a programmatic perspective, the initiative projects themselves appear to have been effective new pathways for organizations to connect to their audiences, and in some cases to new audiences. It is outside the scope of this review to declare some projects successful and others less so, but some of the innovations have clearly been embraced by audiences and/or have reshaped the public identities of the organizations that pursued them. One hallmark of these projects is that they were part of a larger rethink by these organizations: Either the project itself was broad enough or central enough to constitute a fundamental change of strategy in its own right (as, for example, at the Hammer Museum and Berkeley Repertory Theatre), or it was one aspect of a longer, broader transformation initiative (for example, at

the Oakland Museum and de Young Museum). On the other hand, a few enthusiastically embraced programs (such as Active Arts at The Music Center in Los Angeles) have *not* been — or not yet become — part of a broader institutional shift or transformation. Instead, these projects have found an audience, or a community, by offering an appealing alternative to the experiences normally associated with the participating institutions, an alternative that operates in parallel to the institutions' core programming and business models.

As of this writing, most of the Arts Innovation Fund projects appear to have limited long-term prospects. Grantees that have completed the terms of their grants have downsized, suspended or even eliminated their experiments. A few of the projects did generate some level of new *earned* revenues, but not enough to sustain the work purely on that basis. (That should be no surprise, since even traditional programming models in the arts are not sustainable on earned revenues alone.) And although most grantees indicated that they have looked for — and some have found — new sources of *contributed* support for the projects, to our knowledge, none has generated sufficient resources to replace Irvine's Arts Innovation Fund commitments. One hopeful but realistic theater leader told us, "We're looking for a donor base that understands the work, model and atmosphere we're creating with our project, but when the Irvine money is done, we'll probably need to decrease the program and juggle for a few years." (Not surprisingly, none

Grantee participation in the innovation process generated effects, particularly on their organizational cultures, that may last far longer than the experiment itself.

of the grantees indicated that they were considering cutting core programs to finance an extension of the innovation projects; the revenue potential of the core programs is, at this point, far greater than that of the innovation projects and too valuable to divert.)

Time plays a major role here. The Arts Innovation Fund made its first awards in 2006, so we are now just a few years beyond the end of the grant cycle for those initial grantees; (most grants had three-year terms). Grantees were deeply appreciative of multi-year support and noted how unusual that kind of commitment is in arts philanthropy. But even those extended terms may be too short to discover whether such projects can grow into sustainability. Arts Innovation Fund grants started a cycle of exploration; the grantees now need help from other sources to continue it.

Yet as we observed earlier in this report, grantee participation in the innovation process generated other effects, particularly on their organizational cultures, that may last far longer than the experiment itself. Grantees reported important changes that they expect to extend beyond the Irvine funding, changes that seem likely to make them more adaptive and resilient as organizations in the future. In these organizations, junior staff had taken increasingly significant leadership roles; the pyramidal hierarchy typical of many arts organizations had been flattened somewhat; communications across the organizations had become more open and fluid, with departments less separated in siloes; in some cases, the sense of

“The project itself ended with the grant, but the project caused cultural changes... and those remain.”

–Museum Staff Person

collective purpose had been renewed; and in other cases they had become more open to partnerships with their audiences and communities. As one museum staffer told us, “The project itself ended with the grant, but the project caused cultural changes at the museum, and those remain. The project was fixed in time, but its legacy is the different ways the museum relates to the public.” It’s hard to know how long these internal culture changes will last. But the enthusiasm with which the grantees spoke about those changes suggests that they will try hard to sustain them. It helps that the costs of changing organizational culture are minimal compared to the costs of changing programming strategies, so these changes should be sustainable from a financial perspective. And if the research about organizational change and innovation is correct, the altered cultures at these organizations will make future creative adaptation and innovation more likely, thereby strengthening these organizations and, by extension, the nonprofit arts sector in California.

Recommendations

We close with six recommendations that emerge from this review and analysis of the Arts Innovation Fund. These are intended to be helpful both to Irvine, as it designs future funding programs in the arts, and to other funders, policymakers and everyone concerned with the future of the nonprofit arts sector.

- 1. Build third-party consulting into grant programs that support innovation and change, but give grantees choices when it comes to selecting their consultants.**

EmcArts' role in the Arts Innovation Fund program demonstrates that foundation-funded consulting can be a valuable way for arts organizations to gain access to seasoned advice and perspectives as they grapple with challenges and experiment with new ideas. Incorporating process facilitation and consulting services into the initiative made the experiences richer and the learning deeper for most grantees. Funders should consider giving grantees some choice among consultants and facilitators, as one size does not fit all. Funders should also recognize that there is significant expertise in audience and community engagement among smaller and community-based arts organizations, whose leaders and staffs are veterans of such practices. They could be considered for consulting assignments or integrated into innovation programs for larger organizations that have less experience with, or more institutional constraints on, this kind of work.

- 2. Require partial matches from trustees in order to make post-grant sustainability more likely.** Board involvement in the Arts Innovation Fund projects was limited. But in a few cases, we saw that the enthusiastic commitment of even a single trustee was vital to sustaining innovative ideas and practices beyond the grant period. Funders hoping to foster change, especially at large arts institutions, should consider requiring a partial matching grant in the form of new contributions from board members.

The span of time required for systemic changes to take root and become independently sustainable is long — a decade or more, perhaps.

3. **Be patient — real innovation is a long process and requires long-term investment. Deep change takes time, perhaps especially at large organizations.** The Arts Innovation Fund’s commitment of two to four years is longer than most grant periods, and it made possible work that would not have been attempted on a one- or two-year schedule. But the span of time required for systemic changes to take root and become independently sustainable is probably even longer — a decade or more, perhaps. Patient investing will be required to support deep change. That kind of sustained investment will almost surely require the entry of additional funders into the arena of change and innovation in the arts, and might benefit from coordinated strategies among those funders.
4. **Encourage the development of new revenue streams and business models.** Arts organizations are, among other things, businesses that have been built on a combination of earned revenues (mostly from tickets or admissions) and contributed revenues (mostly from individuals and foundations). The difficulty grantees have had (or predict they will have) in sustaining their innovation projects after the conclusion of the Arts Innovation Fund underscores the urgent need to integrate thinking about innovation and about new revenue streams, earned *and* contributed. Funders should explicitly encourage arts organizations’ efforts to pursue this thinking and to experiment with the most promising

new ideas. In a similar vein, new business and organizational models are much discussed in the arts today, but rarely experimented with in practice — least of all by established nonprofit arts organizations. Funders might also encourage experimentation and entrepreneurship at this level, since new structural models could make possible a wider range of programmatic innovation in the field.

- 5. Foster idea-sharing across arts organizations, because innovation is a collective enterprise.** It's important to acknowledge that most of the Arts Innovation Fund projects were not original inventions that broke new ground in the arts sector. They were part of a larger tapestry of experimentation that has been bubbling in the arts field for years. The Arts Innovation Fund grantees were informed by, and drew heavily on, preceding work at other arts organizations — sometimes by their peers in other states, and sometimes in smaller organizations more closely woven into the lives of their communities than those at the top of the cultural hierarchy. In turn, projects in the initiative will no doubt inform the design and development of innovations at other organizations. Innovation is a collective, inherently social process. Recognizing that, funders should consider building structures for collaborative idea-generation, idea-sharing and “notes swapping” into grant programs focused on innovation and organizational change. (This was

done to some extent in the Arts Innovation Fund, and most grantees found the periodic meetings with other grantees exciting and generative.)

- 6. Reframe the question away from how to engage audiences and toward how arts experiences can be made more relevant and meaningful to more people.** The language of “engaging audiences” dominated the thinking of most Arts Innovation Fund grantees. That phrase, which has become commonplace in arts discourse, does represent a historical shift in the way arts organizations think about their goals. But seen in the light of today’s emerging practices, it unnecessarily constrains creativity because it embeds the traditional duality in which there are artists or performers on the one hand and audiences or consumers on the other. Some of the most exciting Arts Innovation Fund projects — like other recent innovations in the arts field — make that duality moot. Who was the “audience” and who were the “artists” in The Old Globe’s *Odyssey*? Instead, we should ask what kinds of arts experiences can make the arts more relevant and meaningful to more people — and to more *kinds* of people. When we do that, our sense of what arts organizations and professional artists do and what kinds of experiences they can facilitate becomes far wider, the roles that the arts can play in contemporary society become richer and the possibility grows that many more people can participate in *creating*, not just consuming, culture.

Between April and June 2012, Slover Linett interviewed the following grantees for this paper.

Melissa Smith
Conservatory Director
American Conservatory Theater

Lori Fogarty
Director and CEO
Oakland Museum of California

Susan Medak
Managing Director
Berkeley Repertory Theatre

John Forsythe
President
Pacific Symphony

Michael Ritchie
Artistic Director
Center Theatre Group

Ann Campbell
Director of Strategic Planning
San Diego Opera

**Renee Baldocchi,
Sheila Pressley**
Director of Public Programs,
Director of Education
de Young Museum

Glenn McCoy
Executive Director
San Francisco Ballet

Ann Philbin
Director
Hammer Museum

Dominic Willsdon
Curator, Education and
Public Programs
San Francisco Museum
of Modern Art

Clement Hanami
Art Director
Japanese American
National Museum

Nan Keeton
Director of Marketing,
Communications, and
External Affairs
San Francisco Symphony

Michael Rosenberg
Managing Director
La Jolla Playhouse

Aandrea Stang
Senior Adult Programs Manager
The Museum of Contemporary Art,
Los Angeles

Jane Burrell
Senior Vice President of Education
and Public Programs
Los Angeles County Museum
of Art

Ming Ng
Director of Programming
The Music Center

Julia Cole
Grants Manager
Los Angeles Philharmonic

Roberta Wells-Famula
Director of Education
The Old Globe

Hugh Davies
David C. Copley Director and CEO
Museum of Contemporary Art
San Diego

Between April and June 2012, Slover Linett interviewed the following outside experts for this assessment.

Roberto Bedoya
Executive Director
Tucson Pima Arts Council

Alan Brown
Principal
WolfBrown

Marcy Hinand*
Principal
Helicon Collaborative

John Holden
Associate Visiting Professor in
Cultural Policy
and Management
Demos; City University London

Elizabeth Long Lingo
Director, Creative Campus
Initiative and Creative Enterprise
& Public Leadership
Curb Center for Art, Enterprise
and Public Policy at Vanderbilt
University

Rebecca Novick
Director
The Triangle Lab

Frances Phillips
Program Director,
Arts and The Creative
Work Fund
Walter and Elise Haas Fund

Diane Ragsdale
Ph.D. candidate in cultural
economics; blogger
Jumper, an artsjournal.com blog

John Shibley*
President
John Shibley Consulting

Nina Simon
Executive Director
Santa Cruz Museum
of Art and History

Laura Zucker
Executive Director
Los Angeles County Arts
Commission

** Formerly involved with the Arts Innovation Fund (Hinand as Arts Program Director at Irvine, Shibley as a facilitator working with EmcArts).*

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2. San Francisco Ballet, photograph by Erik Tomasson
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5. San Francisco Museum of Modern Art
6. American Conservatory Theater
7. The Museum of Contemporary Art, Los Angeles, photograph by Christina Edwards
8. de Young Museum
9. San Francisco Symphony
10. San Francisco Ballet, photograph by Erik Tomasson
11. Center Theatre Group, photograph by Craig Schwartz
12. Oakland Museum of California, 2012, photograph by Terry Lorant
13. Berkeley Repertory Theatre, photograph by Cheshire Isaacs
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