

Capacity Building

RURAL OREGON
& SOUTHWEST
WASHINGTON



Building successful, sustainable arts organizations in a crowded, shifting cultural marketplace

The Program

Capacity Building: Rural Oregon & Southwest Washington was an outgrowth of conversations among Oregon and Washington foundations

regarding a shared, growing concern about the relevance and longevity of arts and cultural organizations and their role in the health and vitality of our region.

After a yearlong discussion among themselves and with DeVos Institute of Arts Management leaders, a collective of 11 foundations agreed to support a program of formal seminars, online master classes, and individualized consultation in an effort to foster sustainability and long-term growth of cultural nonprofits that deliver quality programs and services to the people of Oregon and Washington.

The Cohorts

In 2014 the program launched **Capacity Building: Oregon**, its first two-year cohort of 12 arts and culture organizations. The majority of the organizations selected by the DeVos Institute were headquartered in Portland, many of which provided services at times throughout Oregon. After the success of the first cohort, the second cohort was launched in 2017 to focus on 15 arts organizations serving rural Oregon and southwest Washington. These two-year cohorts provided arts and culture organizations with intensive training in areas such as **long-term artistic planning, board development and engagement, program marketing and fundraising, and strategic planning.**

The seminar reminded me that 'art is a birthright' and must be accessible. My board and staff gained a great deal of knowledge about how a performing arts organization operates.



Crossroads Carnegie Art Center, *Magic of Christmas Morn*
Columbia Theatre Association for the Performing Arts, *Choir of Man*



Capacity Building: Rural Oregon & Southwest Washington

Participating arts organizations attended three seminars with the full cohort, with topics focused on building successful, sustainable nonprofit arts organizations in a crowded, shifting cultural marketplace.

The organizations received monthly one-on-one consultations with a DeVos Institute advisor focused on implementing key objectives in each area of the Cycle, completed a comprehensive curriculum of “planning prompts” to develop concrete planning documents, and participated in a series of special topic webinars between seminars that deepened dialogue on areas of focus. In addition, participants were offered up to four in-person visits to discuss challenges specific to the organization. The program’s final seminar was designed as a capstone to share program learning and position participants as a peer-to-peer brain trust.



Ross Ragland Theater

The Cycle

The DeVos Institute of Arts Management’s central philosophy for creating and sustaining healthy arts organizations is known as **the Cycle**, which maintains that success for cultural organizations in today’s climate requires the mastery of four sequential actions. If repeated year after year, the Cycle builds and sustains organizational health.

1

The consistent production of bold, surprising, high-quality art

2

Aggressive marketing that creates demand for this art, and the institution behind it, attracting and exciting patrons

3

Cultivation of the resulting “family” of ticket-buyers, trustees, and supporters, drawn by this art and marketing, and those who wish to see the organization succeed

4

Fundraising that transforms the goodwill of this family into resources through contributions, volunteerism, and board service

Cohort Participant Organizations

BendFilm · Todd Looby, Executive Director

Britt Gardens Music and Arts Festival · Donna Briggs, President and CEO

Caldera Arts · Brian Detman, Executive Director

Columbia Theatre Association for the Performing Arts · Gian Paul Morelli, Executive Director

Crossroads Carnegie Art Center · Ginger Savage, Executive Director

Eugene Ballet · Josh Neckels, Executive Director

Four Rivers Cultural Center · Matthew Stringer, Executive Director

High Desert Museum · Dana Whitelaw, Executive Director

Lincoln City Cultural Center · Niki Price, Executive Director

Oregon Coast Council for the Arts · Catherine Rickbone, Executive Director

Pendleton Center for the Arts · Roberta Lavadour, Executive Director

Ross Ragland Theater · Theresa Silver, Interim Executive Director

The Arts Center · Cynthia Spencer, Executive Director

Umpqua Valley Arts Association · Jeneen Hartley, Executive Director

Vancouver Symphony Orchestra · Igor Shakhman, Executive Director

I was inspired
to become
a better arts
advocate.



Vancouver Symphony Orchestra

The Results

Collectively, the cohort made significant advances in **artistic planning, board development, marketing, and fundraising**, and evidenced particularly strong progress in **institutional marketing**. The program has helped participant organizations to develop a common language for thinking about the challenges they face on a day-to-day basis and in the long term.

Their progress was evaluated by conducting a Cycle Audit at the beginning and at the close of the program to assess pre- and post-program capacity. Qualitative and quantitative metrics help tell the story of this two-year effort, a brief summary of which follows.

+ Income: The cohort reported an aggregate of a 10 percent increase in total income. 62 percent reported noteworthy advancements in diversifying their contributed income portfolios, and 92 percent reported progress in generating earned income. In aggregate, earned income increased by \$1,000,000 and contributed income by more than \$570,000.

+ Planning Horizon: 71 percent of organizations reported an increase in their planning timeframe for major programmatic efforts, allowing them to produce the type of high-quality, transformational programming that will sustain their organizations in today's increasingly competitive environment.

+ New Programs/Works: 93 percent reported introducing new programs, events, or community-based engagement efforts to serve a total of 32,188 individuals, and 64 percent reported commissioning or creating new works.

+ Staff Capacity: Since the start of the program, organizations reported a 37 percent increase in marketing staff and a 15 percent increase in fundraising staff. 64 percent reported an increase in full-time staff dedicated to marketing. Additionally, 100 percent reported working more collaboratively across departments.

+ Board of Directors: The total aggregate increase in board members among all organizations was 11 percent, and 71 percent of organizations reported an increase in the percentage of board members that were actively engaged. 54 percent saw an increase in contributions from board members.

+ Individual Giving: 69 percent reported an increase in contributions from individuals, representing an increase of nearly \$350,000 and 1,300 donors across the cohort. Several organizations described increased sophistication in the execution of their individual giving strategies.

+ Fundraising: 62 percent saw an increase in fundraising return on investment, 83 percent improved donor relationship management skills, and 67 improved the effectiveness of existing fundraising strategies, tools, and approaches.

+ Growth Opportunities: Increasing board giving, effectiveness of marketing and fundraising staff, and engagement of seasonal residents.

The rural Oregon program demonstrated once again that there is great art produced everywhere. It was a pleasure and an honor to work with this remarkable cohort to ensure that the arts and arts education are available to all.

MICHAEL KAISER

The Cycle Audit

Participant organizations ranked the quality of their plans in place before the inception of the program and

evaluated it at the close of the program. The indicators included 12 areas the DeVos Institute believes are essential to organizational success.

Organizations were asked to provide evidence to support their rankings, citing specific examples of their advancements and remaining challenges. The specificity of this feedback was then woven into their respective work paths as counseled by their individual advisors. Key organizational and financial statistics from their fiscal year completed before the beginning of the program and their most recently completed fiscal year provided the basis of an objective analysis of organizational capacity at each stage.

The 12 capacities in the Cycle Audit include:

- 1 Art/Programs
- 2 Institutional Marketing
- 3 Programmatic Marketing
- 4 Board of Directors
- 5 Family and Community Engagement
- 6 Individual Donors
- 7 Corporate, Government, and Foundation Donors
- 8 Earned Income
- 9 Staffing and Succession
- 10 Space and Facility
- 11 Implementation
- 12 Financial Management



The Arts Center Corvallis

The Feedback

Participant organizations independently addressed several questions regarding their experience with *Capacity Building: Rural*

Oregon and Southwest Washington. Many experiences were shared, regardless of size or arts discipline. At other times, such factors influenced their reaction to the volume and intensity of the programming. A summary of participant comments follows.

Value of Program Aspects

Organizational Consulting

- + The site visits helped to connect the remainder of the board with the project and offered a chance for the board to ask questions of the mentor and get a different perspective than simply from staff.
- + Monthly phone meetings with the mentor revealed different perspectives that have helped organizations to see program elements in a different light.
- + Responsive and engaged mentors who genuinely care about the organizations helped them make progress and have success.

- + The mentor/organization relationship was based on mutual respect and a shared sincere interest in making the organization stronger. The mentor sought to truly understand the culture of the organization, board, and community.

Peer Learning

- + Built a network of the roster of organizations and their leaders to use as a resource during the program and after its completion.
- + The cohort was encouraging and supportive. Hearing success stories and ideas of fundraising techniques was helpful.

Program Learning Model

- + The project supported much needed organization-wide mission/values review, program planning, and system development.
- + Based on the inspiration and knowledge provided by this program, organizations found that their boards shifted their perception of what they do and why they do it.

Program Model Effectiveness

- + The buy-in from the staff and board to implement the Cycle allowed participants to see results throughout their organizations.
- + Boards became more engaged and enlightened about the challenges of running a cultural organization, leading to greater appreciation and greater support for the work.

- + Organizations used the tools and information as a guide to onboard new leadership and get a renewed commitment from staff and board.
- + The Cycle helped their teams to develop a common language.

Philosophy of Institutional Marketing

- + Organizations have made a big push to promote more institutional marketing.
- + The DeVos Institute ideology, with a focus on institutional marketing, has provided a resource for board and staff to expand their thinking and open opportunities beyond current projects.

Change in Approach

- + Organizations' participation has produced what will be long-term change in how they think about events, promotion, board participation, planning, and donor-base cultivation.
- + Leadership has changed their mindset to always think ahead and engage in advanced planning.
- + The transformation of the board has been an invaluable result of the program.



Four Rivers Cultural Center

Suggestions for Program Refinement

- + Amazing tools were provided through the program, but smaller organizations suggested more examples that could be scaled to their size.
- + Program demands can be difficult for organizations with few or part-time staff, and some grant-supported hours each week would lessen the stress on staff and programming.
- + It can be difficult to get enthusiasm and buy-in from the board because they are not as involved in the process as staff, and it's asking more time from them than they already give. Enlist involved board members to "preach the Cycle gospel!" to other members.
- + Interaction from the previous cohort would be valuable for learning. Create a way for cohort members to share resources and expertise more easily.
- + Facilitated conference calls between cohort members during the process would be helpful for ideas, support, and encouragement.
- + Opportunities within the program are limited for coordinated sharing of ideas and implementation of those ideas into common practices. Increased opportunities for coordinated cohort dialogue would increase those exchanges of ideas.

- + The opportunity after the program to deepen the relationships and connections between leaders operating in isolated rural areas would be valuable.
- + A peer-mentoring leadership cohort to build leadership capacity in the organization.
- + A one-time refresher course focused on a particular part of the organization's work path/plan.



BendFilm (photo: Kami Couch)

The Future

Participants reflected on their organizations' purpose, evaluated whether individual programming met their respective missions, and more fully embraced the

Cycle concept of future planning to lay the groundwork for the bold new initiatives that translate into growth in new family audiences and stakeholders.

Still, much work remains. In closing, participant organizations shared their institutional priorities moving forward, what assistance they would benefit from to build on the work of the past two years, and their suggestions for future iterations of this program:

Institutional priorities moving forward

- + Attract a new segment of audiences with targeted works.
- + Implement future A-levels projects that were not previously possible.
- + Continue to hone the giving portion of the family.
- + Continue the process toward meaningful strategic plans.
- + Focus staff time and capacity on the people-powered resource development.

- + Solve practical, everyday problems before dreaming of bigger public art installations.
- + Rework board composition and identify members who can help achieve short- and long-term goals.

Greatest areas of need

- + Dedicated staff time to implement donor relations software.
- + Shift resources to implement all learnings from the program.
- + Time and resources to truly embrace institutional marketing.
- + Fund a part-time position to help advance the goals and enhance the program's effectiveness.

Top suggestions for a future DeVos Institute initiative

- + A 12-18 month director coaching opportunity with Michael Kaiser or Brett Egan to help instill the principle of capacity building in each organization.
- + A peer-mentoring leadership cohort to build leadership capacity in the organization.
- + A one-time refresher course focused on a particular part of each organization's work path/plan.

Organizations working in rural and semi-rural environments face unique challenges, but also have unique lessons to offer their colleagues in more populous areas around the country—namely **can-do resilience, entrepreneurship, and the many values of building community.** I've been witness to these assets on countless occasions in partnership with these leaders and am eager to carry these lessons forward in our service to others nationwide.

BRETT EGAN



High Desert Museum
Britt Gardens (photo: Mike Gantenbein)



Umpqua Valley Arts Association



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- Oregon Community Foundation
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Lincoln City Cultural Center

About the DeVos Institute of Arts Management

Founded in 2001, the DeVos Institute of Arts Management and its leadership team have extensive expertise in strategic planning, artistic planning, board development, marketing, fundraising, and financial management. Organizational leaders leverage this expertise to train, support, and empower arts managers and their boards. Today its senior staff continues to provide consulting services, training, and support for the arts leaders in the United States and in over 80 countries on six continents.

The DeVos Institute is led by Michael M. Kaiser, chairman, and Brett Egan, president. Kaiser was president of the John F. Kennedy Center for the Performing Arts for 13 years and now oversees the DeVos Institute's training and consulting programs. Egan provides planning and training services for arts and culture organizations nationally and internationally.



Pendleton Arts Center
Oregon Coast Council for the Arts



Variety of Visions
Work from the Northwest Sculptors



Caldera Arts

I've been involved
in nonprofits and
advisory councils
my entire
professional life
and found the
information
presented for the
management of
arts nonprofits
absolutely fantastic.