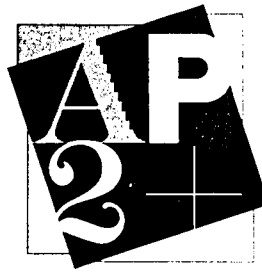


111 S.W. OAK, SUITE 304  
PORTLAND, OR 97204  
PHONE: 503-273-8831  
FAX: 503-273-8878



July 30, 1991

LIBRARY ADVISORS:

James DePreist  
Irene Schnitzer

LEARNING COMMITTEE:

George 'Bing' Sheldon, Chair  
Richard Area

Larry Arnstad  
Joyce Ashmanskas  
Charlotte Beeman  
Lannis Bigelow  
Brian Booth  
Herald Campbell

Daniel Chernoff  
William Creevey

Wayle Darr  
Frank Delia

Harry Demorest  
Michael Boherly

John Dozono  
Donna Drummond

Wanda Durham  
Edmo

Don Frisbee  
Doug Goodman

Helen Holzman  
Nickle Lynch

Incy Matschek  
Marianne Mayfield

Sharon Mitchell  
Irene Painter

Laura Ross-Paul  
Liam Prats

Janna Priestley  
Esther Puentes

Dr. Judith Ramaley  
Ivy Rosencrantz

Ted Savinar  
Tim Schmidt

Itzi Scott  
Joan H. Smith

Elizabeth Waters  
Jef Weinstein

Dr. Nancy Wilgenbusch  
Virginia Willard

Mark Worth  
William Wyatt

Joseph Wyatt  
ELECTED OFFICIALS

Comm. Mike Lindberg, Chair  
EXECUTIVE DIRECTOR

John Mason

Dear Friend of the Arts:

One of the most enriching aspects of life in the Portland region is the commitment of our citizens to building an ever better quality of life for the children of tomorrow. That awareness of stewardship has been the driving force behind the creation of **Arts Plan 2000+**. We are extremely proud and excited to present for your review this extensive, in-depth consultant report on the state of the arts in our area.

The Wolf Organization has compiled and assessed information from many sources: interviews with community leaders, a public survey, task forces and open regional meetings. The results represent a clear and honest report card on the status of the arts. These recommendations on improvements will give Portland and the surrounding region an "A+" for artistic excellence, financial stability, cultural richness through ethnic diversity and meaningful opportunities for our children and their families.

A hearty and warm thank you to the hundreds of you who have already put numerous hours into helping shape this report. Now, we ask you and all other interested citizens of our region (Clackamas, Clark, Multnomah and Washington Counties) to thoroughly review this report and help establish priorities, time lines and strategies to accomplish these recommendations.

Please get involved! From now through October 1991, there will be public meetings, special forums and other opportunities for you to comment on this report. You may call the Arts Plan office at 223-0831 for more information on how you can participate.

Your input is vital for **Arts Plan 2000+** to become our community's plan. Help us ensure that the arts become an integral part of everyone's daily life for our region.

Sincerely,

*Mike Lindberg*  
Commissioner Mike Lindberg

*BING*

George 'Bing' Sheldon  
Chair, **Arts Plan 2000+**



**Arts Plan 2000+** would like to hear from you regarding your opinions and review of this report's recommendations. Please respond in writing by October 15, 1991 so that your comments may be incorporated into our community cultural plan by the end of the year. Or, you may call the Arts Plan office, (503)223-0831, for more information about public meetings in fall 1991 to discuss this report.

Please comment here:

Return this form and any additional pages to **Arts Plan 2000+**, 111 S.W. Oak, Suite 304, Portland, Oregon 97204. Please include your name, address and daytime phone number so that we may add you to our **AP2+** mailing list.

**ARTSPLAN2000+**

---

*Consultants' Report:  
An Arts Plan for the Portland  
Region*

*July 1991*

---

The Consultant Team

Jane Culbert  
Patricia Fuller  
Marc Goldring  
Elizabeth Kennedy  
Bernard Lopez  
Bill Moskin  
Herb Sprouse  
Dr. Thomas Wolf

*The Wolf Organization, Inc.  
8 Francis Avenue  
Cambridge, MA 02138  
(617) 492-2167  
(617) 492-7525 fax*

# Table of Contents

<i>Executive Summary</i> .....	<i>i</i>
<i>Part I: Introduction and Policy Statements</i> .....	<i>1</i>
<i>Part II: Results of General Public Survey</i> .....	<i>7</i>
<i>Part III: Infrastructure</i> .....	<i>27</i>
<i>Part IV: Human and Financial Resources</i> .....	<i>52</i>
<i>Part V: Arts Education</i> .....	<i>78</i>
<i>Part VI: Public Involvement</i> .....	<i>90</i>
<i>Part VII: Cultural Diversity</i> .....	<i>107</i>
<i>Part VIII: Cultural Facilities</i> .....	<i>121</i>
<i>Part IX: Public Art</i> .....	<i>144</i>
<i>Part X: Next Steps and Timeline</i> .....	<i>171</i>
<i>Appendix A: List of Participants</i>	
<i>Appendix B: Performing Arts Facility Survey</i>	
<i>Appendix C: Model Programs in Identified Areas of Concern</i>	
<i>Appendix D: Telephone Survey Protocol</i>	
<i>Appendix E: Local Government Support for Art Museums</i>	

# Executive Summary

Arts Plan 2000+ is an eighteen-month planning process which is intended to yield a comprehensive long-range plan for arts and culture for Portland, Oregon and the surrounding three-county region by the end of 1991. This report summarizes the research findings and presents the consultants' recommendations which will form the basis for the final plan.

Public involvement in the planning process was very extensive. Research — involving surveys, interviews, public meetings, and task force activities — revealed the extensive range and quality in arts and cultural offerings in the Tri-County region. It also showed that citizens' participation in the arts and their interest in cultural amenities as part of their lifestyles was equal to or greater than what can be found in many other cities. Financial support for the arts by both the public and private sectors was substantially below national norms according to several comparative indicators. This has led to severe problems for the health of the arts community including accumulated and operating deficits among major organizations.

The following are other key findings of the consultants, based in part on the work of the Arts Plan 2000+ Steering Committee, Executive Committee, and various task forces and focus groups.

## Arts Organizations

The consultants give highest priority to building healthy arts organizations and they propose mechanisms for improving institutional

stabilization. They emphasize the need for a region-wide technical assistance and salary support program and highlight the need for organizations to focus audience development activities in the areas of cultural diversity and regionalism. In addition, they propose a rental subsidy program initially targeted primarily for local organization use of the Portland Center for the Performing Arts (PCPA).

### Artists

The consultants support the idea of an entity dedicated to the needs of artists in the form of a semi-autonomous division of a newly-created regional arts council. They foresee the possibility that such an entity might ultimately become a free-standing state-wide organization. They also recommend an individual artists' fellowship program, a technical assistance program for artists, and an annual "Arts Congress" to address issues of concern to artists in the region.

### Arts Agencies

The consultants recommend a fundamental restructuring of public arts administration in the region. METRO should become the lead agency in coordinating, collecting, and disseminating public funds for the arts. The Metropolitan Arts Commission should be restructured as a private nonprofit regional arts agency to take the lead in administering arts programs regionally. Local arts agencies, associated with and designated by municipalities in the region, would play a role in supporting local arts activities in their areas. Regional cooperation in planning, programming, marketing, technical assistance, and facility development would all be part of the new approach.

### Human and Financial Resources

Research revealed a need for public and private sector leadership on behalf of the arts, particularly in the area of funding. The consultants suggest how a leadership group might step forward to address the needs of the cultural sector and find ways to carry out and fund the recommendations in Arts Plan 2000+.

In addition, the consultants recommend that Portland and the surrounding region develop new public funding mechanisms for the arts. They document the comparatively low level of public support in Portland and propose several alternative funding mechanisms. They emphasize the importance of identifying a public funding source that can partially address the full range of need, estimated at between \$4 and \$5 million annually. At the same time, priority is given in the report to upgrading existing private sector giving. New donor upgrade efforts, programs in planned giving, and fund-raising technical assistance are specific strategies that are described.

### Arts Education

The consultants stress the importance of arts education not only for developing basic skill learning but also as an important long-range tool for building enthusiastic and knowledgeable arts "consumers." They recommend a regional planning and coordinating body to raise the visibility of arts education. In addition, they recommend that priority be given to assisting schools in the region in meeting the state's Common Curriculum Goals for the arts. Finally, they propose improved in-service training in the arts, non-school-based multi-cultural arts education programs, and locally available professional-level training for young people.

### Public Involvement

The consultants recommend a comprehensive program of region-wide information and promotion strategies to widen public participation in the arts. They also recommend additional funding for free events and events in locations not commonly serviced by arts organizations. They stress the importance of regional marketing and joint promotion strategies and point out the necessity for a coordinated effort to enhance the effectiveness of cultural tourism activities. Finally, the consultants propose the development of a long-range plan for the establishment of a major arts festival modelled on Charleston's Spoleto, USA.

## Cultural Diversity

The consultants point out that cultural diversity is a cross-cutting issue that is addressed throughout Arts Plan 2000+. They propose the development of a summary statement on the importance of such diversity in the cultural life of Portland and the region. They recommend specific programs to highlight culturally diverse arts activities and to bring information about the arts of the region to multi-cultural communities. In addition, they propose programs of outreach and technical assistance to culturally diverse artists and arts organizations, programs to increase the number of people of color involved in mainstream arts organizations, and a mechanism to assure ongoing oversight and input by people of color into public arts administration and grant-making.

## Cultural Facilities

The consultants endorse the major recommendations of the METRO Facilities Study that relate to PCPA. However, they emphasize that any proposals for new sources of funding for PCPA must be part of a comprehensive solution to regional arts funding. They highlight the importance of developing new or renovated facilities to be used by smaller arts organizations, artists, neighborhood groups, and multi-cultural constituencies. In addition, they propose a comprehensive planning process for facilities which fairly adjudicates between competing projects and develops a regional perspective on new facility development.

## Public Art

The consultants provide an overview of public art in the Portland region and propose regional expansion with a long-range planning and policy group setting priorities and goals. In addition, they recommend that a variety of strategies be employed to expand the vision of public art, increase flexibility in programming, and encourage more public art projects by private developers. The consultants express some concern about the nature of the public art collection and make recommendations to develop a more coherent statement of pur-



pose, assure the parity of art with architectural and other elements, raise professional standards for commissioned works, and develop a more complete process for public art conservation.

### Next Steps

The consultants recommend a detailed procedure by which this report can be developed into a community cultural plan by the end of 1991. It includes extensive public comments and refinement of the consultants' recommendations into a costed-out list of priority strategies and activities arranged into a timeline.

Following is a list of specific recommendations included in the body of the report, with reference to the page on which the recommendation can be found.

---

### *Infrastructure*

**Recommendation III.1:** The highest priority should be placed on building the long-term financial stability of Portland's arts organizations. (Cf. page 27)

**Recommendation III.2:** A region-wide comprehensive technical assistance and salary support program should be developed to assist small and mid-sized organizations with institutional development. (Cf. page 30)

**Recommendation III.3:** Arts organizations must continue to respond to long-term audience development challenges in the area of cultural diversity and regional marketing. (Cf. page 33)

**Recommendation III.4:** A rental subsidy program should be developed to assist local organizations in renting the Portland Center for the Performing Arts and other prime spaces while subsidies for visual arts facilities should also be explored. (Cf. page 35)

**Recommendation III.5:** New support systems must be developed to provide for the needs of individual artists. (Cf. page 37)

**Recommendation III.6:** The financial and career development needs of individual artists should be addressed, at least in part, by a fellowship program and a technical assistance program. (Cf. page 39)

**Recommendation III.7:** An annual Arts Congress should be convened each year to address issues of common concern to artists and arts organizations in the community. (Cf. page 41)

**Recommendation III.8:** A new regional public sector mechanism for funding the arts should be developed with METRO playing a central role in collecting funds for distribution to arts agencies in the region. (Cf. page 42)

**Recommendation III.9** A substantially restructured Metropolitan Arts Commission should play a central role in administering arts programs regionally. (Cf. page 43)

**Recommendation III.10:** In order to carry out its new functions as a regional arts council, the Metropolitan Arts Commission should be restructured as a 501(c)(3) private nonprofit corporation. (Cf. page 45)

**Recommendation III.11:** A formula for redistribution of arts funds should assure local municipalities that they will have cash available for local needs. (Cf. page 49)

**Recommendation III.12:** The new Regional Arts Council should be used as a vehicle to raise public and private sector funds for the arts in the region, developing cooperative applications with other local councils when appropriate. (Cf. page 50)

### *Human and Financial Resources*

**Recommendation IV.1:** A leadership group must be assembled which will devote itself primarily to the urgent needs of the cultural sector in Portland and the region. (Cf. page 53)

**Recommendation IV.2:** A small group of leading private citizens must be assembled who will work to find ways to develop a long-term resource base for the broad vision of Arts Plan 2000+. (Cf. page 56)

**Recommendation IV.3:** Portland and the surrounding region needs to develop increased sources of public funding to support arts and cultural needs as outlined in this plan. (Cf. page 58)

**Recommendation IV.4:** Any public funding mechanisms that are proposed should seek to deal with the full scope of challenges and needs facing the arts community. (Cf. page 65)

**Recommendation IV.5:** A concerted effort must be made to upgrade private sector giving levels in Portland and the surrounding area. (Cf. page 66)

**Recommendation IV.6:** Far more emphasis should be placed on planned giving as a way to stabilize the finances of arts organizations, particularly larger ones. (Cf. page 69)

**Recommendation IV.7:** Professional fund-raising assistance should be made widely available to arts organizations. (Cf. page 71)

**Recommendation IV.8:** The funding community, including small and medium-sized businesses, should cooperate to help set up and supply "arts incubators" for small and emerging groups, especially multi-cultural groups. (Cf. page 72)

**Recommendation IV.9:** Opportunities should be explored to develop and sell arts-related products that speak to community pride issues, promote the arts of the area, and provide a dedicated stream of funds to support artists. (Cf. page 74)

**Recommendation IV.10:** As a long-term strategy, a public/private one-time funding initiative should be planned to help stabilize the finances and operations of arts organizations. (Cf. page 75)

### *Arts Education*

**Recommendation V.1:** A regional planning and coordinating body for arts education should be formed through the Metropolitan Arts Commission for the purposes of information sharing, advocacy, planning and coordination of arts education programs, fund raising, and other initiatives in arts education. (Cf. page 80)

**Recommendation V.2:** Among the priorities for the regional planning and coordinating body should be a program to assist schools in implementing the state's Common Curriculum Goals for the arts. (Cf. page 83)

**Recommendation V.3:** Arts education advocacy activities should incorporate parents and should include public proclamation events as well as strategies that expand the use of artists, arts organizations, and multi-cultural presentations for school-age children. (Cf. page 84)

**Recommendation V.4:** Specific programs should be developed to improve pre-service and in-service training for teachers including stricter certification and recertification requirements for teachers and administrators. (Cf. page 85)

**Recommendation V.5:** Non-school-based education programs should be fostered, encouraged, and funded — including those based in neighborhoods and those which are aimed at preserving and presenting the work of other cultures. (Cf. page 86)

**Recommendation V.6:** MAC's Arts Education Working Group should begin to explore the possibility of creating more professional-level training opportunities in the arts for young people in the Portland area. (Cf. page 88)

### *Public Involvement*

**Recommendation VI.1:** A variety of region-wide information and promotion strategies should be developed to encourage greater public participation in the arts. These might include multi-language brochures, an arts periodical, an events database, coordinated market research, a mailing list development program, and better utilization of the media. (Cf. page 91)

**Recommendation VI.2:** More public and private funding should go toward events for the general public that are less costly and are held in alternative locations and spaces throughout the region. (Cf. page 96)

**Recommendation VI.3:** Efforts should be made to enhance the perceptions of convenience and safety in connection with getting to and from Portland-based events. (Cf. page 98)

**Recommendation VI.4:** Arts organizations in Portland should develop a regional marketing strategy which includes joint promotions and packages. (Cf. page 99)

**Recommendation VI.5:** A Working Group on Cultural Tourism should be formed through the Portland Oregon Visitors Association (POVA) and should sponsor an ongoing education and technical assistance program. (Cf. page 102)

**Recommendation VI.6:** The proposed POVA Working Group should undertake a long-range plan to develop an ongoing structure for cultural tourism including ideas for tour packaging, information dissemination, and centralized ticketing. (Cf. page 103)

**Recommendation VI.7:** Long-range planning for cultural tourism should explore the feasibility of an arts festival along the lines of Spoleto, USA. (Cf. page 105)

### *Cultural Diversity*

**Recommendation VII.1:** The new Regional Arts Council should draft and disseminate a summary statement which defines cultural diversity and affirms its importance to the arts of the region. (Cf. page 108)

**Recommendation VII.2:** Information about a broad range of arts activities should be disseminated to the multi-cultural community. Efforts should also be made to inform the larger community about the range of multi-cultural activities in the region. (Cf. page 109)

**Recommendation VII.3:** Programs of outreach and technical assistance should be designed and targeted specifically to ethnic and minority communities. (Cf. page 111)

**Recommendation VII.4** Programs should be developed to assure that culturally diverse individuals and organizations have greater representation on the boards and staffs of arts organizations, as well as public commissions and task forces. (Cf. page 113)

**Recommendation VII.5** Major arts organizations should be encouraged to increase their emphasis on culturally diverse programming. (Cf. page 114)

**Recommendation VII.6:** Efforts should be made to take advantage of the arts and cultural implications of Portland's role as a Pacific Rim City. (Cf. page 115)

**Recommendation VII.7:** Steps should be taken to assure an equitable allocation of available funds. In addition, the Regional Arts Council should consider establishing a special grants program called the "Cultural Diversity Initiatives Program," to provide funding for multi-cultural arts activities by both mainstream and culturally diverse organizations. (Cf. page 116)

**Recommendation VII.8:** The facilities requirements of neighborhoods and culturally diverse groups should be highlighted as priority needs within the cities of the Tri-County region. (Cf. page 118)

**Recommendation VII.9:** A Working Group on Cultural Diversity should be established to provide relevant perspective to the Regional Arts Council as it implements the recommendations of Arts Plan 2000+. (Cf. page 119)

### *Cultural Facilities*

**Recommendation VIII.1:** Arts Plan 2000+ should endorse the major recommendations of the METRO Facilities Study Sub-committee on the Portland Center for the Performing Arts with the caveat that recommended new sources of public funding must be part of a comprehensive solution for cultural funding in the region. (Cf. page 122)

**Recommendation VIII.2:** The City of Portland (and other municipalities in the region) should develop clear policies which state priorities for siting and funding small, affordable facilities to be used by emerging cultural institutions and neighborhood constituencies. (Cf. page 124)

**Recommendation VIII.3:** The new Regional Arts Council should institute a planning process for new cultural facility development projects in the region. (Cf. page 128)

**Recommendation VIII.4:** The regional planning process for facilities should be consistent with the provisions of Arts Plan 2000+ and should represent the overall interests of the region as well as those of specific cultural constituencies. (Cf. page 131)

**Recommendation VIII.5:** The new Regional Arts Council should be the convener of a Regional Cultural Facilities Planning Group. This group should consist of expert staff-level representation of METRO, MERC, local planning agencies, and regional cultural institutions. (Cf. page 134)

**Recommendation VIII.6:** The planning process should thoroughly evaluate both the proposed facility project and the impact which the completed project will have on the participating cultural organizations and the communities in which they are located. (Cf. page 135)

**Recommendation VIII.7:** A three-stage, progressive planning sequence should be implemented which allocates appropriate resources to the analysis of proposed projects in each of the three stages. (Cf. page 136)

**Recommendation VIII.8:** As part of its role in planning for new facilities, the Regional Arts Council should maintain a database of existing and proposed facilities in the region. (Cf. page 141)

### *Public Art*

**Recommendation IX.1:** Public art programs should be expanded regionally with MAC taking a primary role in this expansion. (Cf. page 147)

**Recommendation IX.2:** A long-range goal should be to establish a regional planning and policy-setting group for public art which sets priorities and goals on a regional basis. (Cf. page 149)

**Recommendation IX.3:** The regional planning group and MAC administrators should look for additional ways to expand public art in the three-county area including getting more agencies to voluntarily comply with the public art program. (Cf. page 151)

**Recommendation IX.4** A variety of strategies must be developed to expand public awareness and appreciation of public art including a broader understanding of the place of public art in the life of a community and the role of artists in the process. (Cf. page 152)

**Recommendation IX.5** New mechanisms should be explored to expand the definition of public art including temporary and ephemeral work, new genres, minority cultural content, and other issues. (Cf. page 155)

**Recommendation IX.6** More effective methods should be in place to encourage high quality art projects by private developers. (Cf. page 157)

**Recommendation IX.7** Portland should develop a clear statement of purpose for its public art collection with standards and criteria to guide acquisition, screening for the collection, and deaccessioning. It should also develop a system for evaluating individual projects or the collection as a whole. (Cf. page 159)

**Recommendation IX.8** In planning for permanent, commissioned public art works, works of art should be given a position of parity with architecture and design in the overall planning of the urban landscape. (Cf. page 161)

**Recommendation IX.9** In order to raise the standards of permanent commissioned works, the public art program should incorporate a stronger voice for artists in determining what role art will play in a civic project, raise commission levels to artists, and develop a more professional selection process. (Cf. page 162)

**Recommendation IX.10** A new approach to public art conservation should be developed which includes more complete planning, registration, condition monitoring, and more realistic budgeting. (Cf. page 164)

**Recommendation IX.11** MAC should add staff in the public art area and charge agencies their fair share for program management to cover these increased costs. (Cf. page 166)

**Recommendation IX.12** A restructured Public Art Advisory Committee should play a greater role in policy, planning, and decision-making. Efforts should be made to reduce the appearance that PAAC and the selection committees are controlled by a small group of people and additional outside, paid expertise should be sought. (Cf. page 168)

### *Next Steps and Timeline*

**Recommendation X.1:** The Steering Committee should review the changes made in the preliminary version of this report to make sure they incorporate community concerns. (Cf. page 172)



**Recommendation X.2:** The Steering Committee should spearhead the completion of the planning process using specially convened *ad hoc* sub-committees to address specific topics. (Cf. page 173)

**Recommendation X.3:** Arts Plan 2000+ should develop an advocacy strategy in order to move toward acceptance of the plan by the community and implementation of its final recommendations. (Cf. page 175)

**Recommendation X.4:** Unless the final version of the plan suggests otherwise, after January, 1992, all aspects of the cultural planning process should be overseen and coordinated by the reconstituted Metropolitan Arts Commission and METRO. (Cf. page 177)

**Recommendation X.5:** Efforts should be made to expand the cultural planning process to include Clark County. (Cf. page 178)

# Part I Introduction and Policy Statements

## Description of Arts Plan 2000+

Arts Plan 2000+ is an eighteen-month citizen-driven planning process which is intended to yield a comprehensive long-range plan for arts and culture for Portland, Oregon and the surrounding three-county region by the end of 1991. A 43-member Steering Committee of community leaders, seven Task Forces, and an outside consulting firm have assessed:

- the status, health, and future role of arts programs, arts organizations, and public art
- issues relating to cultural facilities, funding, the needs of multi-cultural groups, opportunities for economic development through the arts, arts education, and a host of other topics
- infrastructure issues relating to agencies that will be responsible for carrying the plan forward.

The research has included interviews with several hundred citizens, public meetings, focus groups, surveys of the general public, studies of practices in other cities, and ongoing debates and discussion among various advisory committees including those representing arts groups, public officials, and other community leaders. This report summarizes the research findings and incorporates the consultants' recommendations for the future of arts and culture in the region.

The need for a cultural plan has grown out of various challenges and opportunities:

- Undercapitalization of the cultural sector has left many organizations in debt, has forced individual artists to leave the area, has left the Portland Center for the Performing Arts in need of a continuing source of operating subsidy, and has failed to address the need for facility operating subsidies for visual arts organizations.
- Cultural programming, funding, and audiences cannot grow substantially nor can they contribute to the economic development of Portland unless there is a concerted effort to plan and develop the arts on a regional basis; at the same time, there is growing demand for the arts and culture outside of metropolitan Portland.
- New definitions of arts and culture can make the arts more accessible to underserved populations, particularly those who come from different racial and ethnic groups.
- Public education has been hurt by funding cuts and it is important to assess the role the arts might play in the healthy educational development of young people.

Arts Plan 2000+ has been coordinated under the auspices of a citizen-driven Steering Committee and has been funded by a number of public and private sources.

### Links to Other Local Planning Efforts

Arts Plan 2000+ has been formally linked to two other planning efforts that have been going on concurrently in Portland:

- *Portland Future Focus* is a comprehensive general planning process for the City of Portland. There has been close cooperation between Future Focus and Arts Plan 2000+ over the first half of 1991 as well as overlap in the composition of Task Forces, Working Groups and Steering Committees. Future Focus has looked to Arts Plan 2000+ to analyze the cultural sector in depth and to make recommendations which might be incorporated into its larger comprehensive strategic plan. Arts Plan 2000+ has complied and has made formal suggestions to each of the six Future Focus Working Groups. It has, in addition, pointed out a number of areas where the two independent planning efforts have overlapped.

Like Future Focus, Arts Plan 2000+ is making recommendations which:

- support the goal of graduating all children from high school with basic skills enabling them to succeed in the work force and post-secondary education
  - underscore economic development strategies, including cultural tourism, which will enhance the economic vitality of the area
  - promote an awareness of cultural diversity and provide mechanisms that will embrace and celebrate diversity
  - encourage community leadership by enhancing public acceptance and admiration for individual leadership efforts
  - look toward regional planning, funding, and programming as a way to maximize quality of life for the area's citizens.
- *The METRO Regional Facilities Study* has been a planning effort aimed at determining the future of cultural, recreational, and sports facilities in the region. One of its sub-committees has looked at the current challenges facing the Portland Center for the Performing Arts and has based some of its work on information provided by Arts Plan 2000+. This report, in turn, has endorsed the recommendations of that sub-committee (as is discussed in Part VIII).

### Organization of this Report

This report is divided into several sections, most of which contain specific recommendations for future action. These recommendations are intended to become the basis for the final version of the cultural plan. The sections of the report are described below:

- The *Executive Summary* provides a short abstract of the report followed by a listing of all the recommendations with page references.
- Part I furnishes an overview of Arts Plan 2000+ as well as policy statements reflecting community values and goals for the arts.
- Part II summarizes the results of the survey of the general public in the Tri-County region conducted in February, 1991.
- Part III assesses the cultural infrastructure including arts organizations, artists, and the public agencies responsible for carrying out Arts Plan 2000+.

- Part IV presents options for expanding both human and financial resources for the arts.
- Part V suggests new initiatives in arts education.
- Part VI summarizes issues relating to greater public involvement in the arts and makes recommendations for increased local participation and cultural tourism.
- Part VII offers specific strategies in the area of enhanced cultural diversity in the arts of the region.
- Part VIII supplies information on cultural facilities and recommends policies which will strengthen the region's facility infrastructure.
- Part IX evaluates the current public art programs in the Portland region and suggests how they can be strengthened.
- Part X provides a timeline for next steps in the planning process.

There are five appendices:

- Appendix A lists those who participated in Arts Plan 2000+.
- Appendix B provides detailed data on comparative cultural facilities across the United States and Canada.
- Appendix C details model cultural programs from various cities which can provide creative ideas for Portland and the Tri-County region.
- Appendix D is a copy of the protocol for the consultants' survey of the general population.
- Appendix E compares local government support levels for several West Coast art museums.

### *Policy Statements and Comments*

The following policy statements have been adapted from a general statement forwarded to *Portland Future Focus* from Arts Plan 2000+ in June of 1991. These statements are followed by some further descriptive comments about the cultural vitality of the Portland region.

*Arts Plan 2000+, representing the citizens of Clackamas, Multnomah, and Washington Counties, affirms that the quality of life of the region can be enhanced through public arts, cultural activities, and community events.*

*Arts Plan 2000+ values the social, economic, and creative contributions of a strong, diverse, and accessible arts, cultural, and events community.*

*Arts Plan 2000+ believes that the region benefits substantially from its artists, arts organizations, and cultural facilities.*

*Arts Plan 2000+ endorses public and private financial investment in the arts as an essential community investment.*

*Arts Plan 2000+ advocates for cultural opportunities and arts education for all people in the region.*

*Arts Plan 2000+ values public art that can be enjoyed by everyone. It believes that all citizens of the region should have the opportunity to participate in the arts. It seeks to broaden the definition of the arts to be inclusive of all traditions and cultures.*

The Portland area has witnessed an explosion in cultural activity during the decade of the 1980's. Attendance at arts events sponsored by nonprofit organizations in Portland reached 2.9 million in 1988, according to a survey by the Metropolitan Arts Commission (MAC), representing a 27% increase since 1982. At that time, the direct economic impact of the arts was well over \$84 million.

The cultural sector creates jobs, promotes private investment in public amenities, enhances the City and the region's image, helps to attract businesses, investment, and top-level executives, and promotes the area as a tourist and convention destination. The arts also act as a resource for the community by providing creative talent, alternative activities for youth and families, opportunities to develop neighborhood involvement and pride, and creative ways to address pressing societal issues.

The Portland area has received national acclaim in the last few years for its cultural vitality as a key contributor to "quality of life." The arts were a primary factor in Portland's winning the top City Livability Award from the United States Conference of Mayors in 1988 and the arts of the area were mentioned prominently in a *Newsweek* article last year naming Portland one of the nation's ten best cities. Local arts organizations, programs, and individuals active in the arts have recently been featured in *Newsweek*, *Time*, *Life*, *The New Yorker*, *People Magazine*, *The New York Times*, and a host of other national publications.

Growing audience demand, increased production costs, and inflation have driven up expenses of arts organizations over 100% since 1982. Despite the increased popularity and the growing importance of the arts to the area's community image and economic vitality, the public's small financial share of support has declined. Over the last eight years, local government subsidy to arts organizations' budgets dropped from over 4% to less than 2%. Costs associated with cultural facility use are far higher in Portland than many comparable communities which provide higher direct subsidies to their facilities.

Arts Plan 2000+ endorses the arts as a basic community value and a right of all citizens. This report provides a blueprint for how the cultural needs of the region can best be met.

### Acknowledgements

The consultants have worked in many communities across the country and nowhere has the level of enthusiastic participation been as broad as it has been in the Portland region. Literally hundreds of people have been willing to invest tremendous amounts of their time in this process, and to the extent that Arts Plan 2000+ is successful, it will be due to the efforts of the many people involved. In particular, the consultants would like to thank:

- George "Bing" Sheldon, Chairman of the Steering Committee
- Ann Mason, Executive Director of Arts Plan 2000+
- Commissioner Mike Lindberg and his Assistant, Kathleen Johnson-Kuhn
- Bill Bulick and the entire staff of the Metropolitan Arts Commission
- the members of the Steering Committee, its Executive Committee, and the seven task forces whose work forms the basis of this report
- all the many individuals who participated in public meetings, focus group sessions, or interviews.

A complete listing of individuals who participated in this project is provided in Appendix A to this report.

## Part II Results of General Public Survey

Many aspects of cultural planning depend on insights into the behavior and interests of the arts audience. Presented in this part of the report are the findings of a detailed survey of audience members in Multnomah, Clackamas, and Washington Counties. The primary emphasis of the survey is toward performing arts activities inasmuch as the survey was commissioned in part by METRO in connection with a study of performing arts facilities being undertaken concurrently with Arts Plan 2000+. However, the survey does indicate the very large audience for the visual arts in the region.

During the month of February, 1991, a telephone survey was conducted to gather information about participation in a wide variety of arts activities and about attitudes regarding the arts held by citizens of Portland and the Tri-County metropolitan area. The questionnaire used in the survey is based on instruments designed and tested by the consultants for use in previous studies, thereby allowing for general comparison of the results with those of other areas of the country. The survey instrument was reviewed prior to its administration and approved by an advisory committee including representatives of Arts Plan 2000+, METRO and the Portland Center for the Performing Arts (PCPA). A copy of the questionnaire is included as Appendix D of this report.

The purpose of the survey was fourfold:

- to inventory current activities of Tri-County metropolitan area residents in terms of attendance at performing arts events and use of the PCPA



- to indicate the level of audience participation in visual arts activities (excluding media art and life-long arts education activities)
- to determine the opinions of both audience members and non-participants on a variety of issues related to the arts and possible arts program initiatives
- to develop selected other data for use in the continuing cultural planning process.

As in the case of many surveys, this one answers some questions and raises others. In particular, the heavy emphasis on the performing arts which was necessitated by the pressing problems of the Portland Center for the Performing Arts meant that fewer questions regarding the visual and media arts could be asked (there is a limit to the time respondents are willing to stay on the phone to answer questions and this survey pushed those limits). The survey can therefore be seen as an important beginning in continuing research of this kind which will be appropriate as the recommendations of Arts Plan 2000+ are implemented.

### Survey Methodology

The telephone survey was directed toward adult heads of household residing within the political boundaries of the Tri-County metropolitan area, defined as including Multnomah, Clackamas and Washington Counties. In the discussion which follows, "regional" refers to the Tri-County area exclusive of Portland residents and "City" refers specifically to residents within the political boundaries of Portland.

A total of 345 households were surveyed using a rigorous, probability sample telephone number generation process. This method assures distribution of the calls across the geographic survey area in a manner consistently reflecting the distribution of population in the region. The size of the sample and the method of generating the telephone numbers assure a high degree of reliability for the responses. When evaluating the results of the survey, the responses should be viewed as being reliable plus or minus four percent.

After initially tabulating the overall results of the survey, the consultants performed extensive cross-tabulations of the data by various characteristics of the survey group. These include such factors as place of residence, frequency of arts participation, subscriptions and memberships held, presence

of children in the household, and various other demographic factors. A subgroup of PCPA attenders was also developed, allowing for comparison of the characteristics and attitudes of current attenders at PCPA facilities with those of the larger community.

### Qualifying the Respondents

In addition to determining that the respondents were adult heads of household and residents of the counties included in the survey, a further screening process was added which is very important to the quality of the information collected. Each adult was asked:

*“During the past 12 months, have you attended any type of performing arts or entertainment event in Portland or the Tri-County metropolitan area, such as the symphony or other classical music concert, a play, a Broadway show, a dance concert, an opera performance, or a popular concert for which you or someone else paid for the tickets?”*

If the respondent could not answer the question positively, a second question was asked:

*“Have you visited a museum, a science center or an art gallery in Portland or the Tri-County metropolitan area in the past 12 months?”*

Failure to answer either question affirmatively resulted in the respondent being routed through a shortened version of the questionnaire, eliminating some questions most appropriately answered only by those who have direct experience of local programs and institutions. It is important to differentiate between responses of attenders and non-attenders when projecting the interests and future participation of arts audiences for two reasons:

- First, industry marketing professionals, academic literature, and the experience of the consultants indicates that adults who do not attend events or institutions of these types are more difficult to influence to attend in the future. This means that planning for new programs or facilities generally cannot rely on non-participants for audience support.
- Second, an even more important reason for including only arts attenders in the longer form of the survey is found in the nature of some of the questions which are included. Asking questions about such subjects as the quality of events, frequency of attendance, and

presence of children in the attending party results, inevitably, in distorted and potentially misleading information when answered by respondents who have no direct personal experience.

## Survey Results

### Current Attendance and Participation

In the first section of the interview, the respondents were asked about their attendance at performing arts events, museums and art galleries. The overall participation rates for the sample were reported as:

- 51 percent of the Tri-County metropolitan area residents said that they had attended a live performing arts or entertainment event (with a paid admission) in the past 12 months.
- 34 percent had attended a museum, science center or art gallery during the same period.

For the purpose of further analysis, the 176 Tri-County metropolitan area performing arts attenders were divided into attendance frequency groups as shown below:

- Light Attenders (1-3 events in the past 12 months) 19%
- Medium Attenders (4-6 events) 24%
- Heavy Attenders (7 or more events) 57%

Based on Wolf Organization studies in other communities, there are fewer light attenders and a greater number of heavy attenders in this survey. Attendance at specific events and institutions was also inventoried in detail, as were preferences for many types of arts programming. These findings are discussed below.

To form a point of comparison for the attendance data, survey respondents were also asked:

*“In the past 12 months, have you attended a professional or semi-professional sports event in the Tri-County metropolitan area?”*

- 33 percent of the total sample of Tri-County metropolitan area residents said they had attended a professional or semi-professional sports events in the past 12 months.
- Arts attenders were more likely to have attended a sports event (36 percent) than non-attenders (29 percent).
- Residents of the nearby region were more likely to have attended a sports event (35 percent) than Portland residents (28 percent).
- By far the most likely to have attended a sports event were households with children, who reported 43 percent attendance.

The participation rate in live performing arts and entertainment events is higher than in professional sports events for residents of the Tri-County region. This is consistent with the findings of studies in other parts of the country.

#### Attendance Habits, Party Size, and Children in Attendance

In order to form a better understanding of the dynamics of regional attendance, the survey subjects who were arts attenders were asked about the typical size of their attending party and also about the inclusion of children.

The average size of an attending party at arts events is 3.1 people for all Tri-County metropolitan area residents. Parties of Portland residents average 2.8 people, and parties of regional residents average 3.2 members.

In response to the question "When you attend an arts event, are there ever children under age 18 in your party?", 44 percent of all Tri-County metropolitan area performing arts attenders reported that children did accompany them sometimes. They estimated that children join their parties 47 percent of the time, with an average of 2.1 children per party when children are in attendance.

Among regional performing arts attenders, 45 percent reported that children sometimes accompany them to events. They are joined by an average of 2.2 children somewhat more often (52 percent of the time) than are Portland residents, who included children 44 percent of the time (with 2.1 children in the group on average). This suggests that, for regional attenders, the availability of programming suitable for children is likely to be a more important factor in deciding to attend than it is for the comparable group of City residents who sometimes include children in their party.

### General Opinions about Cultural Institutions and Programs

Both arts attenders and non-attenders were asked their responses to a series of statements expressing opinions about the state of cultural institutions and programs in the region. The interviewer introduced the question with the statement:

*"We have heard some general comments about the arts in the metropolitan area, and I am going to read them to you. For each of these comments, please tell me if you strongly agree, agree, disagree, or strongly disagree with the statement."*

- Nearly four out of every five respondents agreed that "The arts are available to all residents, no matter where in the Tri-County area they live."
- About two out of three agreed that "More cultural activities should take place in neighborhoods rather than in downtown Portland."
- Better than one-half of the respondents agreed that "The quality of the arts in Portland is higher than it was five years ago."
- Only about one in four felt that "The arts in Portland are only of interest to the wealthy and well-educated."
- About one-half agreed that "There are plenty of facilities for small performances and classes throughout the Tri-County area." Significantly more residents of the nearby region (56 percent) than Portland residents (45 percent) agreed with this statement.
- Only one in every seven respondents agreed or strongly agreed that "There is little diversity of cultural expression in arts programs in Portland."
- Nearly three quarters of the respondents agreed or strongly agreed that "Portland is a much better place to live because of the variety of arts activities going on here." Not surprisingly, arts activities are more important to arts attenders (81 percent agreed) than to non-attenders (66 percent agreed).
- An exceptionally high four out of every five respondents agreed that "City and County government should continue to support cultural activities in our community." Fully 76 percent of non-attenders agreed with this statement.

- Better than two-thirds agreed that “There should be more opportunities for interested people to participate in the arts through classes and performance opportunities.”

Figure II.A presents the percentage of the respondents who agreed or strongly agreed with each opinion presented.

**Figure II.A: Opinions about cultural events and institutions**  
(percent who agree or strongly agree)

	Total Sample	Arts Attend-ers	Non-Attend-ers	Portland Residents	Nearby Region
“The arts are available to all residents, no matter where in the Tri-County area they live.”	78%	77%	80%	76%	80%
“More cultural activities should take place in neighborhoods rather than in downtown Portland.”	59%	59%	59%	56%	61%
“The quality of the arts in Portland is higher than it was five years ago.”	56%	64%	49%	56%	56%
“The arts in Portland are only of interest to the wealthy and well-educated ”	26%	23%	28%	27%	25%
“There are plenty of facilities for small performances and classes throughout the Tri-County area.”	51%	54%	49%	45%	56%
“There is little diversity of cultural expression in arts programs in Portland.”	14%	14%	14%	16%	13%
“Portland is a much better place to live because of the variety of arts activities going on here.”	73%	81%	66%	73%	73%

Figure II.A, continued

	Total Sample	Arts Attend- ers	Non- Attend- ers	Portland Residents	Nearby Region
"City and County government should continue to support cultural activities in our community."	80%	84%	76%	80%	79%
"There should be more opportunities for interested people to participate in the arts through classes and performance opportunities."	69%	69%	68%	70%	68%

### Barriers to Attendance

Understanding the reasons why people limit their attendance at arts events and institutions is important in developing programs to stimulate attendance and support for local facilities.

Both attenders and non-attenders were asked to respond to a series of statements describing reasons why their attendance was not more frequent. For each statement, those surveyed were requested to tell the interviewer whether the statement was a major reason, a minor reason, or not a factor at all in their decision not to attend more performing arts events in downtown Portland.

For all residents of the Tri-County metropolitan area, the major reasons cited as limiting attendance were:

- high ticket prices (given by 75 percent as a major or minor reason)
- a lack of additional free time (given by 72 percent)
- inconvenience and high cost of parking (given by 68 percent)
- poor information about available events (given by 41 percent).

Among respondents who reside in the nearby region, the major factors limiting attendance were very similar to those cited by the City residents. However, differences in two areas do exist.

- As might be expected, more regional residents (42 percent) than City residents (14 percent) indicated “It takes a long time to get into Portland for events.”
- More regional residents (46 percent) than City residents (33 percent) indicated that they did not hear about events in Portland.

The responses for the *general population* of the geographic study area are summarized in Figure II.B.

**Figure II.B: Reasons for not attending more performing arts events (as reported by both attenders and non-attenders)**

Respondents giving as a “Major” or “Minor” reason...

	Portland Residents	Nearby Region
“The performing arts groups in Portland don’t offer what I want to see.”	33%	33%
“The facilities in Portland are difficult to find.”	17%	25%
“The quality of the presentations is not high enough.”	11%	16%
“I don’t hear about the events in Portland.”	33%	46%
“Parking downtown is difficult and expensive.”	64%	71%
“The starting times for arts events are not convenient for me.”	30%	39%
“It takes a long time to get into Portland for events.”	14%	42%
“The ticket prices are too high for me to attend more events.”	75%	75%
“I don’t have anyone to attend events with.”	37%	37%
“I don’t feel safe in Portland.”	30%	36%



Figure II.B, continued

Respondents giving as a "Major" or "Minor" reason...

	Portland Residents	Nearby Region
"I don't understand arts events."	21%	19%
"I only go to see well known performers."	32%	31%
"I don't feel comfortable with the people who attend arts events."	17%	18%
"Other activities use up all of my free time."	70%	72%
"I'm not interested in arts events."	33%	33%

A comparison of arts attenders with those who do not attend reveals attitudes that are similar in most ways to the regional population as a whole. Some differences do exist, however. Fully 79 percent of the attenders cited high ticket prices as a major or minor reason for not attending more events as compared with 71 percent of the non-attenders. Since Portland has a high percentage of attenders who attend four or more events a year, this may be an indication that, for some, the limits of their discretionary income for arts events are being reached. Forty-six percent of the non-attenders stated that the lack of companions with whom to attend events was a major or minor reason for not attending, as opposed to 29 percent of the attender group.

### Arts Events and Institutions Attended

Each individual who reported attending live arts and entertainment events of any kind was asked to report the types of events he or she had attended in the Tri-County metropolitan area during the past year from a prompting list read by the interviewer. Because respondents to questions of this sort generally overestimate their activity, a selection of local organizations was identified by name. This allows the consultants to adjust the responses by comparing them to actual attendance figures at the events of those institutions. The information shown below is of value in indicating *relative* attendance patterns between organizations and types of attenders. (It is

important to note that the Oregon Arts Institute's Northwest Film and Video Center was not mentioned by name in the survey.) The reported attendance is summarized in Figure II.C, shown on the following pages.

**Figure II.C: Reported attendance at Tri-County metropolitan area arts events and institutions**  
(as reported only by those who attend arts events and institutions)

	Portland Residents	Nearby Region	PCPA Attend-ers
1. A concert by the Oregon Symphony	41%	24%	58%
2. A concert presented by Chamber Music Northwest	15%	2%	11%
3. A performance by the Portland Opera	15%	8%	21%
4. A visit to the Oregon Museum of Science and Industry	59%	60%	67%
5. A current touring Broadway musical, such as "A Chorus Line" or "Cats"	27%	21%	45%
6. A visit to the Portland Art Museum	46%	33%	51%
7. An event at the Interstate Firehouse Cultural Center	10%	1%	7%
8. A performance by the Oregon Ballet Theatre	19%	15%	33%
9. A play by the Oregon Shakespeare Festival — Portland	10%	13%	24%
10. A play by a professional theatre company other than the Oregon Shakespeare Festival	32%	36%	50%
11. A free outdoor event such as Waterfront Classics or concerts in neighborhood parks	64%	52%	65%
12. A play presented by the Lakewood Theatre Company or another community theatre group	9%	17%	22%
13. A youth theatre performance	12%	12%	15%
14. An experimental or avant garde play	3%	3%	7%
15. A modern dance concert, such as Twyla Tharp	15%	2%	10%
16. An arts festival like ArtQuake	44%	43%	59%
17. A One-man Show, such as Hal Holbrook as Mark Twain	5%	3%	6%
18. A comedy act, such as George Carlin	12%	18%	21%
19. A performance by a Popular Artist such as Frank Sinatra or George Benson	20%	18%	26%

Figure II.C: Reported attendance at Tri-County metropolitan area arts events and institutions (continued)

	Portland Residents	Nearby Region	PCPA Attenders
20. A jazz concert	25%	29%	38%
21. A rock concert	24%	15%	13%
22. A Country and Western Concert	11%	16%	18%
23. A concert of ethnic music or dance, such as the African-American Ballet Company or East Indian music or dance	19%	9%	19%
24. A class at a Park and Recreation department program such as the Theatre Workshop or the Community Music Center	12%	12%	18%
25. Other	24%	22%	19%

In comparing these statistics to other communities, the consultants noted that reported attendance at rock concerts and country and western events is substantially below many of the fine arts presentations. Country and western events have been experiencing declining audiences nationwide, but these reported results are below norms for Wolf Organization surveys. Rock attendance is also substantially below expected levels.

*Support for The Arts:*  
*Subscriptions, Memberships and Contributions*

Those respondents to the survey who qualified as arts attenders were asked about the subscriptions and memberships they held and monetary contributions which they made to Tri-County metropolitan area cultural organizations. Of this entire sample group:

- 14 percent of City arts attenders and 15 percent of regional arts attenders reported holding subscriptions or season tickets to performing arts groups. Fully 25 percent of PCPA attenders report holding subscriptions.
- 25 percent of City arts attenders and 14 percent of regional arts attenders reported holding memberships to local museums, science centers and galleries.

- 25 percent of City arts attenders and 29 percent of regional arts attenders reported having made a monetary contribution to Tri-County area arts organizations within the past three years. 39 percent of PCPA attenders reported making such contributions.

Again, these figures are of greatest interest when looked at comparatively. Over-reporting is generally to be expected for such questions.

Sources of Information about Arts Events

Arts attenders were asked to name (without prompting) the primary source of their information about arts events. By far the most frequently cited source was *The Oregonian* (64 percent), followed by *Willamette Week* (12 percent), word of mouth (8 percent) and National Public Television (7 percent). Figure II.D summarizes the findings.

Figure II.D: Primary source of information about arts events (as reported by all arts attenders)

	Percent of respondents
<i>The Oregonian</i>	64%
<i>The Downtowner</i>	2%
<i>Willamette Week</i>	12%
National Public Radio (KOPB)	5%
National Public Television (Channel 10)	7%
Portland Center for the Performing Arts Calendar	0%
Direct mail from Arts Groups	5%
Word of mouth	8%

Portland residents and residents of the nearby region provided nearly identical responses to this question, with the exception that Portland residents are more dependent on *The Oregonian* (70 percent) for arts related information than are residents of the nearby region (61 percent). PCPA attenders also had similar responses to this question.

### Anticipating the Future — Programs for Children

Survey respondents were asked:

*“If more high quality arts programs for children were available in the region, do you think your annual attendance at children’s events would increase, remain about the same, or decrease?”*

Among the general Tri-County metropolitan area population (both attenders and non-attenders), 35 percent of those surveyed indicated that their attendance at children’s events would increase, while 63 percent reported that their total annual attendance would remain about the same. The average projected amount of increase was about 3.8 events annually.

There are some important differences between subgroups on this question. Among those respondents who qualified as arts attenders, 40 percent expected their attendance to increase (by an estimated 3.8 events annually), while only 30 percent of non-attenders anticipated increases (estimated at 3.5 events).

Residents of the nearby region anticipate that increased programming for children would have a greater impact on their attendance than do Portland residents. Thirty-nine percent of regional residents expect increases in their annual attendance (averaging 3.7 events), while 29 percent of Portland residents anticipate increases, averaging 3.3 events annually.

Not surprisingly, households with children are by far the most likely to respond to additional children’s programs. Fully 72 percent of those households anticipate an increase (compared with 35 percent for the sample as a whole) and their expected increase is the largest, averaging 3.9 events annually.

### Anticipating the Future — Interest in Performing Arts Programs

All of the respondents were asked to rate a large selection of specific types of performing arts events in response to the following question:

*“Now I am going to read a list of events. For each one, please tell me whether you would be extremely interested, very interested, a little interested, or not at all interested in attending, if a top quality offering were available in the metropolitan area.”*

Of the offerings read by the interviewer, many included events already offered in the metropolitan area. The purpose of including existing and potential new offerings was to assess the *relative* interest shown by respondents.

Overall, the interests of Portland residents and those who reside in the region are very similar. As would be expected, PCPA attenders are clearly more interested overall in attendance than the general population. Figure II.E presents the percent of those responding "extremely interested" or "very interested" to each type of event.

**Figure II.E: Reported interest in arts and entertainment events**  
(as reported by all respondents interviewed)

Percent of Respondents "extremely" or "very" interested...

	Portland Residents	Nearby Region	PCPA Attend- ers
1. A concert by the Oregon Symphony	34%	36%	52%
2. A concert by a major visiting symphony	41%	33%	50%
3. A chamber music concert or a recital	24%	15%	26%
4. A performance by the Portland Opera	25%	23%	38%
5. A performance by a visiting opera company	24%	23%	39%
6. A current Broadway musical, such as "A Chorus Line" or "Cats"	66%	62%	81%
7. A play by the Oregon Shakespeare Festival or another professional theatre company	52%	48%	60%
8. A current Broadway drama such as "Steel Magnolias" or "Driving Miss Daisy"	64%	57%	69%
9. A play presented by a local community theatre group	45%	40%	37%
10. A children's theatre performance	37%	39%	42%
11. An experimental or avant garde play	18%	17%	22%
12. A performance by the Oregon Ballet Theatre	25%	36%	50%
13. A performance by a visiting ballet company	37%	34%	55%
14. A performance by a modern dance company	29%	26%	31%
15. A One-man Show, such as Hal Holbrook as Mark Twain	38%	30%	38%
16. A comedy act, such as George Carlin	52%	46%	47%

Figure II.E: Reported interest in arts and entertainment events (continued)

	Portland Residents	Nearby Region	PCPA Attenders
17. A musical performance by a Popular Artist such as Frank Sinatra or George Benson	50%	46%	50%
18. A jazz concert	38%	35%	44%
19. A rock concert	26%	20%	20%
20. A Country and Western Concert	25%	32%	20%
21. A concert of ethnic music or dance, such as the African-American Ballet Company or East Indian music or dance	33%	25%	40%
22. An Arts Festival like ArtQuake	44%	54%	53%

### Arts in Education

Of particular interest to the consultants is the level of public support for potential program initiatives in the area of arts in education. The entire group of survey respondents was asked:

*"There are many ways in which education in art, music, drama, and dance may be improved for school children in the region. For each of the programs I will read to you, please tell me if you think it is Very Important, Somewhat Important, or Not Important to include them in the school curriculum."*

The full sample (both attenders and non-attenders) answered as shown in Figure II.F on the following page.

**Figure II.F: Reported interest in arts in education activities**  
(as reported by all respondents interviewed)

	Very Important	Somewhat Important
Providing more classroom education in art, music, drama and dance	49%	37%
Providing field trips to museums and arts events	71%	22%
Providing tickets to live arts events at reduced cost to school children and their families	66%	25%
Providing more extracurricular, participatory activities in art, music, drama and dance	54%	33%
Providing artists to work with children for special in-school experiences	60%	28%

Clearly, the respondents feel that the types of educational programs and experiences described to them are important for school children. Eighty-five percent or more supported each program initiative presented.

The responses of several of the subgroups are shown below in Figure II.G.

**Figure II.G: Reported interest in arts in education activities**  
(percent answering "Very important" or "Somewhat important")

	Total Sample	Arts Attenders	Non-Attenders	Households with Children
Providing more classroom education in art, music, drama and dance	87%	89%	84%	95%
Providing field trips to museums and arts events	91%	95%	92%	99%



Figure II.G: Reported interest in arts in education activities (continued)  
(percent answering "Very important" or "Somewhat important")

	Total Sample	Arts Attend- ers	Non- Attend- ers	Households with Children
Providing tickets to live arts events at reduced cost to school children and their families	92%	94%	89%	98%
Providing more extracurricular, participatory activities in art, music, drama and dance	87%	87%	87%	96%
Providing artists to work with children for special in-school experiences	88%	90%	88%	95%

It is interesting to note that generally there were no significant differences in the responses of attenders and non-attenders in the sample. As might be expected, those households with children showed very high levels of interest in the various programs presented. Each of the subgroups placed especially high priority on field trips and opportunities to attend live events.

### Public Awareness of Public Art

Respondents to the survey were asked:

*"Portland and some of the counties in the area have programs through which one percent of the budget for public construction projects is spent to purchase art works like Portlandia or the sculptures on the transit mall for placement in public spaces. Are you aware of these programs?"*

Overall, 50 percent of those surveyed were generally aware of the public art programs as described. Awareness was slightly higher among Portland residents (55 percent) than among regional residents (48 percent).

They were then asked if they felt that such programs should be expanded, remain about the same, or be reduced in scope. One in five respondents in the total sample felt that the programs should be expanded, while one in four said they should be decreased (54 percent felt that they should remain about the same). This statistic should cause some degree of concern inas-

much as many of those interviewed for this project said that there was overwhelming public support for public arts programs in Portland.

### Demographics

A selection of demographic characteristics was also collected from the respondents to the survey, in order to contrast the various attender and non-attender groups. These demographics are summarized in Figure II.H for the entire sample, for arts attenders, for non-attenders and for PCPA attenders. PCPA attenders are the most educated and wealthy of the subgroups examined and have the highest proportion of aged 35-54 cohort members.

**Figure II.H: Demographics of the sample subgroups**  
(Totals may not equal 100 percent due to rounding and/or refusal to give information.)

	Total Sample	Arts Attenders	Non-Attenders	PCPA Attenders
<b>Age</b>				
18-24	8%	6%	10%	6%
25-34	22%	27%	16%	18%
35-44	25%	27%	23%	28%
45-54	15%	13%	17%	18%
55-64	10%	13%	8%	14%
65 and over	18%	12%	24%	14%
<b>Sex</b>				
Female	62%	64%	59%	71%
Male	38%	35%	41%	30%
<b>Length of residence in the Tri-County metropolitan area</b>				
One year or less	4%	3%	5%	2%
2 years	4%	3%	4%	2%
3 years	2%	1%	4%	1%
4-6 years	8%	7%	9%	9%
7-10 years	8%	10%	5%	13%
More than 10 years	74%	75%	73%	73%
<b>Highest level of education attained</b>				
Grade school	1%	1%	2%	0%

Figure II.H: Demographics of the sample subgroups (continued)

	Total Sample	Arts Attend- ers	Non- Attend- ers	PCPA Attend- ers
Some high school	2%	0%	4%	0%
High school graduate	28%	18%	39%	13%
Some college	30%	34%	25%	30%
College graduate	21%	25%	17%	30%
Post graduate work	15%	21%	10%	26%
Technical school	3%	3%	3%	2%
<b>Children under age 18 live in your household</b>				
Percent with children	37%	43%	30%	40%
Average children/household	2.1	2.1	2.1	2.3
<b>Wage-earners in the household</b>				
One	52%	48%	56%	42%
Two	40%	46%	34%	51%
Three or more	4%	3%	5%	1%
<b>Total household income before taxes in 1990</b>				
Under \$10,000	5%	4%	5%	2%
\$10,000-14,999	7%	4%	10%	2%
\$15,000-24,999	11%	9%	14%	8%
\$25,000-34,999	21%	21%	21%	19%
\$35,000-49,999	22%	24%	20%	23%
\$50,000-74,999	10%	13%	7%	16%
\$75,000-99,999	4%	6%	2%	7%
\$100,000 or more	4%	5%	3%	7%

## Part III Infrastructure

The Portland area's cultural assets are supported by a delicate and fragile web of public-private partnerships which promote access and participation. After a startling growth period spurred by public demand, the arts sector is now in a state of crisis caused by dramatically increased costs and declining resources. If artists and arts organizations are to remain creatively productive and continue to enrich the region, a stronger infrastructure must be created consisting of those who produce and present the arts and those who fund their work.

### Arts Organizations

Portland arts organizations are in financial trouble. Several have ceased operation in the past decade. Eleven of the seventeen largest organizations carry accumulated deficits. While Portland has not seen the precipitous audience decline that has characterized other communities, the audience market in Portland is smaller than in most cities with comparable cultural resources and there is little room for growth without tapping a much larger geographic area. To date, little has been done to develop a coherent, effective marketing strategy beyond Portland. Amid these various challenges, several recommendations for strengthening this part of the arts infrastructure in Portland are presented below.

#### Recommendation III.1:

The highest priority should be placed on building the long-term financial stability of Portland's arts organizations.

*Portland's arts organizations do not meet minimum industry standards of financial health.* These standards, which have been established by the National Arts Stabilization Fund — a Ford Foundation-initiated project promoting the financial security of cultural organizations nationwide — are clear and simple:

- no accumulated deficit
- an unrestricted cash reserve of 25% of the annual operating budget
- a 10% artistic reserve for new project development
- some restricted endowment.

Portland arts organizations have a special additional challenge — they are overly reliant on earned income. In 1989, the Oregon Arts Commission conducted a study of performing arts organizations in the state (of which Portland's are the largest). These organizations are more heavily dependent on earned income than analogous groups nationally. In the survey, Oregon symphonies earned 58% of their income (as compared with a national average for all symphonies of 52%); Oregon dance companies earned 68% of their income (as compared with a national average of 59%); and theatre companies in Oregon earned 74% of their income (as compared with a national average of 61%). National and local data for visual arts organizations shows a similar reliance on contributed income to greatly increased reliance on earned income. The Oregon Art Institute, for example, operates with earned income of 63%. Further, for all the organizations involved, the earned income ratios had increased from previous years when contributed income played a greater part in the mix.

On the one hand, it may seem advantageous that arts groups bring in so much of their income at the door and this certainly should go a long way toward answering those critics who say arts groups in Portland are poorly managed. High earned income ratios suggest that management is doing a good job in presenting a quality product and marketing that product well to the public. To the argument that these organizations ought to bring their operating costs more in line with what they can earn by becoming more efficient, there is a simple answer: there are levels of operating cost required by economies of scale and industry standards below which an organization cannot cut. A minimum number of adequately paid musicians is required if a symphony wants to compete for quality players. The costs associated with maintaining a collection of art worth more than \$75 million in accordance with national accreditation standards cannot be reduced

beyond a certain point. A secretary must be paid a living wage or will look for work elsewhere. Rental expenses are established by landlords, not arts groups. All of these factors suggest that arts organizations in Portland are doing a good job, and that they are for the most part well managed (this fact is confirmed by the comprehensive management reviews that are done by MAC in conjunction with its grant making). The problem has to do with inadequate income to cover operating expenses and since earned income is high on a percentage basis, this suggests inadequate levels of contributed income.

What are the solutions to this problem?

1. The highest priority for planning and funding for arts organizations over the next several years should be on institutional stabilization. This will require a shift in attitude. There have been growing demands on arts organizations for higher salaries for personnel, greater variety in programming, more outreach. Funders must agree that support for new initiatives that require higher levels of contributed income are less of a priority than grants aimed at improving the bottom lines and balance sheets of arts groups. Funders should begin to encourage organizational efforts to build long-term financial health whether or not arts organizations are doing something which is "new and innovative."
2. In this connection, greater emphasis should be put on basic operating grants. While project support should be an option for those organizations wishing to receive it, the greater need in most cases will be for unrestricted operating support.
3. Less emphasis should be placed on organizational growth as an index of success. Growth at the expense of health will be very destabilizing in the long run in Portland. In some cities, there are always cultural "angels" who step forward to bail out leading cultural organizations that grow too fast and incur large deficits. In Portland, this has not been the case and it should not be counted on as a long-term solution to the problem.
4. Public and private funders should explore whether there are means of developing a one-time influx of funds to be used for institutional stabilization and improving the cash positions of arts organizations. A mechanism is suggested in the section of this report entitled "Human and Financial Resources" and is discussed under recommendation IV.10.
5. It is crucial that the community as a whole recognize that if resources for cultural organizations cannot be increased, then the number, size, scope,

and quality of these organizations must be reduced. More organizations will fail. The healthiest ones will survive but in a much diminished form.

Finally, while this report emphasizes the needs of underserved constituents and organizations that have been denied access to funding in the past, it is essential to underscore that larger arts organizations have important needs as well. Public funding to support large institutions is well below national norms for comparably sized organizations. Annual operating grants to majors in Portland are below \$100,000 a year and with two new organizations entering the funding pool, pressure on these dollars will increase. New policies need to be developed with respect to support to major arts organizations as is discussed under recommendation III.12.

**Recommendation III.2:**

A region-wide comprehensive technical assistance and salary support program should be developed to assist small and mid-sized organizations with institutional development.

The problems of institutional stabilization are particularly severe for newer, smaller organizations for several reasons:

- These organizations have difficulty competing for strong trustees who can give and get money.
- They have more difficulty attracting audiences since they are less well known, have smaller marketing budgets, and are often in less desirable facilities than more established groups.
- They are severely undercapitalized and generally cannot afford adequate staff, equipment, or space.
- They often rely on untrained volunteers, staff, and artists to carry out basic administrative tasks.

Interviews, public meetings, and Task Force deliberations all revealed that Portlanders place a great value on smaller organizations. This is particularly true at the present time inasmuch as a greater emphasis is being placed on culturally diverse organizations and organizations located in the region out-

side of Portland, both of which tend to be smaller and in many cases newer than Portland's major arts organizations.

These organizations will need money. But as the Arts Plan 2000+ Resources Task Force made clear, there also is the "need for additional education and expertise in administrative and management skills." The Task Force recommends a comprehensive technical assistance program and administrative salary support program.

Among the priority areas for technical assistance would be:

- governance and board development
- personnel, organizational structure, and staff development
- volunteer recruitment, training, and development
- financial management including budgeting (both short and long-term), cash flow planning, accounting, reporting, fiscal policy and financial controls
- fund raising including annual drives, special gifts and grants, capital campaigns, deferred giving, and so on
- marketing
- public relations
- developing cultural awareness and sensitivity in programming; diversifying boards, staff, and audiences
- short, medium, and long range planning
- program development and management
- program and organizational evaluation
- facility management
- office procedures and operations
- information systems, computers, and other equipment needs.

A comprehensive technical assistance program should involve not only this broad range of areas but also a variety of technical assistance approaches. A sequential program, based on a model recently designed by the Arts Council of New Orleans, would involve the following:

1. Some organizations would be selected on an application basis for diagnostic consultancies to assess their organizational strengths and weaknesses, to identify priority areas for organizational or management develop-



- ment, and to list areas where further consulting assistance would be appropriate.
2. A few organizations each year which had completed the diagnostic consultancy phase would be chosen for follow-up *in-depth* consulting services based on the recommendations from the diagnostic phase. In-depth consultancies would take place over several months and would allow organizations time to implement consultant recommendations and evaluate their success. In some cases, additional "implementation" funds would be available to assist organizations with recommendations which required additional outlays of cash (e.g., a new marketing brochure).
  3. A workshop program based on priority needs in the community (e.g., cultural diversity programming, direct mail fund raising) would be presented and would be open to any and all organizations.
  4. Education assistance grants would be provided on an application basis for staff, trustees, or volunteers of arts organizations to attend conferences, take courses, or engage in other short-term, focussed educational activities related to management needs.
  5. Where diagnostic consultancies indicate a strong likelihood that it would make a major difference in an organization's long-term stabilization and development, salary assistance grants would be provided over no more than a four-year period on a diminishing basis.

This technical assistance program should be provided on a region-wide basis. Priority should be given to organizations that have budgets of less than \$100,000, have been in existence less than ten years, have made a substantive cultural contribution to the community, and provide programming to underserved populations. However, no organization should be excluded from consideration for at least some portion of the technical assistance services.

It should be pointed out that in several sections of this report, the need for technical assistance has been underscored. As an example, recommendation IV.7 emphasizes the need for a targeted technical assistance program in fund raising and recommendation VII.3 targets multi-cultural artists and organizations. As this plan moves forward, these various technical assistance needs should be evaluated to see whether there may be ways to build a single program that is flexible enough to meet the various needs that have been highlighted.

**Recommendation III.3:**

Arts organizations must continue to respond to long-term audience development challenges in the area of cultural diversity and regional marketing.

Portland is a small city with a very small marketing base for entertainment events of all kinds. This has been reflected in the much maligned “pay-per-view” debate regarding games by the National Basketball Association Trailblazers. According to industry professionals, the market is too small to offer games to viewers either on network or cable channels without supplemental charges. To be quite specific, Portland’s market is 821,290 homes; by way of contrast, Los Angeles’ market is 5,026,300 homes.

When this limited entertainment market is taken into account, arts organizations have done rather well in building audiences and generating earned income from admissions. In the case of at least one organization — Portland Arts and Lectures — Portland enjoys better audience numbers than for comparable organizations in other cities with audience potential several times as large. Even so, for Portland organizations to flourish, they will have to continue to build audiences and two sectors seem especially ripe for growth — culturally diverse audiences and audiences from outside of Portland.

*Culturally diverse audiences*

In the case of culturally diverse audiences, a Portland Arts Alliance survey conducted for Arts Plan 2000+ reveals that for the 41 organizations responding, only 5.4% of their audiences for all programs were people of color. The breakdown was as follows:

- Black American 1.4%
- Asian American 1.9%
- Native American 0.2%
- Hispanic 1.9%

As one looks at the distribution of the population by race in Portland, it becomes clear that this is not a representative sample of the City’s population in which 17% are people of color. The breakdown for the Portland population as a whole, based on the 1990 census, is:

- Black American 7.5%
- Asian American 5.2%
- Native American 1.1%
- Hispanic 3.2%

Comparable statistics for the three-county region are as follows:

- Black American 3.2%
- Asian American 3.8%
- Native American 0.8%
- Hispanic 3.4%

Changing the demographics of audiences is not easy and will require a variety of strategies, some of which are discussed in the section of this report dealing with multi-cultural issues. It is important that mainstream arts organizations continue to look at the composition of their boards and staffs and evaluate their programming and their marketing strategies. Culturally diverse organizations also need to be encouraged through funding and technical assistance. Perhaps most promising, partnerships between established mainstream organizations and culturally diverse organizations may bring about significant audience growth. The resources and experience of professional staff of the former combined with the culturally diverse programming expertise and access to audiences of the latter could encourage more participation by audience members of every color.

### Regional audiences

The second area of focus for arts organizations must be the development of audiences from the regional area including the three counties served by METRO together with Clarke County. The regional audience offers a special opportunity to those arts organizations which may find themselves unable to attract tremendous numbers of additional admissions to their events in Portland — the opportunity to develop ancillary programming sites and touring events both of which could produce more earned income.

Today, researchers examining trends in audience behavior cite the need to take live performing arts events to people rather than always to expect people to come to a central city location for cultural amenities. In many

cases, audiences in the region surrounding a major city seem to prefer participating in cultural events locally, even if these are not of the same professional level or as lavish as those offered in more distant locations. Signs of this trend can be seen in the area surrounding Portland. Approximately two thirds of those responding to The Wolf Organization survey felt that more cultural activities should take place in neighborhoods rather than in downtown Portland. Where there are examples of facilities that support such activities — such as the cultural center in Lake Oswego which is housed in a converted school building — there appears to be enthusiastic participation and support from local residents.

This suggests that at least a part of the strategy of arts organizations not only in Portland but in the region as a whole should be focussed on developing offerings that can be enjoyed in communities and neighborhoods throughout the region. For Portland-based organizations, this might suggest performing arts touring programs, low security travelling exhibits, and even the development of permanent secondary performance or exhibiting homes (e.g., a regular concert series by one or more Portland-based organizations in Vancouver or a permanent exhibit space in a community building or a bank lobby in Gresham).

The idea of Portland-based organizations developing programs to take to other communities in the region does not preclude a regional strategy for audience development by the organizations for their home facilities. Such a strategy is described in more detail under recommendation VI.4:

**Recommendation III.4:**

A rental subsidy program should be developed to assist local organizations in renting the Portland Center for the Performing Arts and other prime spaces while subsidies for visual arts facilities should also be explored.

There has been much discussion about rental policy at the Portland Center for the Performing Arts. Should the policy be directed at maximizing income and keeping the operating deficit low; or should the policy be influenced by PCPA's mission to serve local groups, many of whom cannot afford to pay premium prices? Recently, the special sub-committee appointed by METRO to study problems facing the PCPA recommended a

stratified rate structure which would discount rental rates to nonprofits by 25%.

Wolf Organization consultants do not disagree with the view that there should be different rate structures for different classes of organizations and they certainly agree that local nonprofit groups should receive the most beneficial rates. However, they believe that a 25% reduction in rental rates and user fees may not be sufficient to maximize the use of PCPA. In this regard, other cities have found that much greater reductions are required (Seattle offers a 40% reduction, Denver a 43% reduction in prime facilities). Local arts organizations are at differing levels of financial capability and certain organizations whose performances might quite appropriately be housed at PCPA may not be able to afford the rental rates even at the 25% discount. Thus, in some cases it may be appropriate to subsidize rentals still further, especially when a subsidized group might bring something significant and special to the facility.

To be specific: suppose a small organization representing a multi-cultural constituency wishes to put on a gala performance once a year. Based on interviews for this project, the consultants are confident that this is precisely the kind of event that would be consistent with a broader definition of culture which people would like to see in Portland over the next decade. Suppose, in addition, that this group, while capable of pulling off the event artistically and able to draw a large audience, cannot afford the discounted rental rate. That group should be able to apply for a restricted grant to rent the appropriate facilities.

While the primary facility which would be targeted in the initial phases of a rental subsidy program would be the PCPA, in the long run it should be extended to cover other facilities in the region. Guidelines and criteria should be tightly developed so that only those groups that could demonstrate need as well as unique service to the community (particularly underserved audiences) would receive grants. (This is not intended as a program for mainstream organizations doing conventional programs.) In the long run, the program will benefit both nonprofit arts organizations and the facilities which will have fewer dark nights if more groups can afford their rental fees.

Such a grant program should not be administered by PCPA or any other facility that might be eligible. Rather it should be administered by an independent granting agency such as the Metropolitan Arts Commission, a

private foundation, or some other entity which regularly adjudicates applications from arts organizations. Peer panels should be assembled to review grant applications and make recommendations regarding the choice of grantees and the level of grant support.

At the same time that the needs of the PCPA and performing arts organizations are being addressed, research should begin on the occupancy costs and needs of visual arts organizations. METRO's comprehensive facility study did not address this question at all because it has no visual arts facilities under its jurisdiction. But the issue is a pressing one and deserves careful examination. In many cities, all or part of the cost of maintenance, security, utilities, and renovation of visual arts facilities are supported by local government. In Portland, this is not the case. Similarly, while several major performing arts organizations rent and occupy a space built with a significant investment of local taxpayer funds, visual arts organizations have had to raise the bulk of funds to build their facilities. Perhaps a special task force might begin to explore the long-term question of public support for visual arts facilities, beginning with a survey of policies of other cities (some comparative data is included in Appendix E).

### Artists

Artists are part of Portland's arts infrastructure and are an important resource according to the Arts Plan 2000+ Resources Task Force. But they are a resource which is not being properly nourished. According to that Task Force, "Good artists leave, resulting in a brain drain, loss of vitality and creative resources." The reasons for this are many: inadequate and expensive living and working space, too little financial support, and a dearth of technical assistance to help artists with career development needs. The Task Force on Artists Needs concurred with this view and many of their recommendations are incorporated into this section of the report. The reader is also referred to the sections on Public Art, Cultural Facilities, and Cultural Diversity where other recommendations concerning artists are discussed in detail.

**Recommendation III.5:**

New support systems must be developed to provide for the needs of individual artists.

The Resources Task Force believes that "there is a lack of recognition and support for the professional needs of individual artists." Such needs as affordable health care and retirement benefits, technical resources and support, use and/or ownership of rehearsal, studio, and office facilities, and public relations services, are all in short supply. The Artists Needs Task Force goes beyond this, asserting that there is a need for an organization "dedicated to supporting the individual artist with funds, information and advocacy," an organization that would "raise money and redistribute that money in grant programs . . . and would advocate and support artists in all disciplines and keep them informed on health, legal and financial issues, provide a newsletter with critical essays and grant/competition deadline dates." They recommend an "Artist Trust of Oregon," a state-wide organization based on a similar model in the state of Washington that would be supported largely with private funding.

The consultants support the basic concept of an entity which will be dedicated to the needs of artists, especially if it provides adequately for the needs of artists in the three-county region. However, they do not recommend the specific model of a free-standing "Artist Trust of Oregon" supported by private sector funding at this time for several reasons:

1. There is strong sentiment against creating new organizations among almost every constituent group interviewed for this project.
2. Funding dedicated to the needs of individual artists is generally difficult to raise, especially in the private sector. Such funding is easier to raise if an agency can provide broad services to the arts, to arts organizations, and to artists.
3. Support for free-standing service organizations nationally is at an all-time low as funders give priority to support for organizations providing visible programming to the public.
4. Service organizations in primarily rural states find it very expensive to provide services on a state-wide basis.

On the other hand, elsewhere in its report the Task Force also recommends a regional public arts agency — "a Tri-County arts agency to serve as an aggressive public arts funder and advocate" which the Task Force believes should be linked in some way to METRO. The consultants concur with this Task Force strategy and they describe their view of such an agency in

detail under recommendations III.9 and III.10. They believe that this agency could better address the needs of artists in the Portland area:

- Since the agency would grow out of a restructured MAC, it would not be perceived as a new level of bureaucracy and therefore would be accepted by most of those interviewed for this report.
- While the new agency's mission and constituency will be very broad, a semi-autonomous "Individual Artists Division" could be formed specifically to address the needs of individual artists. It should have its own advisory board and staff which specifically plans programs to address the funding and technical assistance needs of artists. One member of the advisory board should serve *ex officio* on the governing board of the agency.
- Because this organization would be regional rather than state-wide, it could focus more precisely on the needs of artists in the three-county area.

At some future time the concept of an "Artist Trust of Oregon" may be viable given a better funding climate and more receptiveness to the creation of new service organizations. When that time comes, the "Individual Artists Division" of the regional arts council could be spun off as a separate organization with an existing track-record, funding history, and credibility.

**Recommendation III.6:**

The financial and career development needs of individual artists should be addressed, at least in part, by a fellowship program and a technical assistance program.

The Resources Task Force underscored the importance of providing a financial base for individual artists if they are to be encouraged to stay and work in the region. Task Force members recommend creating a pool of money to provide individual artist fellowships through the Metropolitan Arts Commission. They felt the current system of providing "project" grants does not effectively serve the individual artist and that it should be replaced by a broad-based and well funded fellowship program. Ultimately, according to the Task Force, approximately \$200,000 a year should be flowing to individual artists in this fashion and the program should be partially or fully endowed. The consultants agree with the thrust of the recommendation but



point out that to their knowledge no local arts agency has been successful in endowing fellowship programs for artists.

The Artists Needs Task Force pointed out the importance of technical assistance and professional development for individual artists as well. Until a free-standing organization is developed which is dedicated to the needs of artists (as discussed under recommendation III.5), the "Individual Artists Division" of the regional arts council should provide a program for artists in this area. It should be pointed out that technical assistance for individual artists will be substantively different from the one for organizations (discussed under recommendation III.2 above). Among the things that might be funded are:

- portfolio and résumé development
- purchase of materials for major works
- assistance with personal financial management
- marketing assistance
- travel assistance and attendance at conferences
- tuition assistance (non-degree-related training).

In Chicago, where such a program is in place, artists can apply for up to \$1,500 on a non-matching basis and the criteria encourage applications from artists of color and artists for whom a small grant will be important in career development.

It is important to observe that while the financial needs of individual artists are great, public agencies generally do not focus on these needs to the degree that they focus on the needs of arts organizations. Some agencies do not fund individuals at all and some provide only token amounts of money. Yet artists as a group generally live at the margin of our society, often depending on other jobs, spouses, and savings to support themselves. In a classic study conducted in New England in the 1980's for example, the average individual artist earned \$6,400 from his or her work while the average engineer with the same number of years of education earned \$27,000 (the engineer is generally covered by medical insurance and does not have to pay self-employment tax). Expenses for supplies, marketing and other career-related needs on average consumed \$3,500 of the artist's income.

It is recommended that Portland pay attention to the financial needs of its artists. The two programs recommended here would provide a resource

base and a strong endorsement of their importance to the life of the community.

**Recommendation III.7:**

An annual Arts Congress should be convened each year to address issues of common concern to artists and arts organizations in the community.

The Task Force on Artist Needs raised an important concern — the need for artists and arts organizations to speak with a united voice on issues of concern to the community. According to their report:

*“Arts organizations, especially the larger ones, tend to be well organized and connected to people of position and power and often effect arts policy that benefits them but not, perhaps, the greater arts community or the greater community at large. However, despite their influence, the larger organizations often need to align themselves with the broadest possible constituency of arts supporters . . . There exists a parallel problem of individual artists feeling under-empowered in the politics of art . . . There should be one arts community, we currently have two — organizations and artists.”*

The Task Force recommends an annual Arts Congress in which representatives of arts organizations and artists would meet once a year over a week-end to address issues of common concern. The Congress could result in policy statements, goals, and strategies for the coming year. It could address issues of funding and censorship; it could even invite candidates for elective office to reveal their arts platforms and endorse one or another of these individuals if it chose to do so.

The structure recommended for the Congress — two houses (a Senate for arts organizations and a House for individual artists) is quite formal and the voting procedures the Task Force recommends are complex. A less cumbersome system might be equally appropriate and might focus more attention on the issues to be discussed. However, the basic concept of the Congress is sound and is a logical outgrowth of Arts Plan 2000+. The Portland Arts Alliance might begin to initiate discussions from the arts organizations' perspective about this issue; a group of individual artists and representatives

from the "Third Thursday" group might organize plans from the artists' side.

### Agency Infrastructure

**Recommendation III.8:**

A new regional public sector mechanism for funding the arts should be developed with METRO playing a central role in collecting funds for distribution to arts agencies in the region.

Perhaps the widest agreement among all of those working on Arts Plan 2000+ is that long-term solutions to the challenges facing the arts community must be met regionally. Virtually every Task Force recommended regional mechanisms in discussing its area of focus. As a result, throughout this report there are recommendations for various regional programs and initiatives.

There is also wide agreement that the funding problems facing the arts must be handled regionally. Metropolitan Portland is too small and there are too many demands on its limited tax base to provide the funds that are needed. As The Wolf Organization survey of the general public makes clear, people in the region share the same general attitudes with respect to participation in the arts as the citizens of Portland. As a result, audiences in the region often look to Portland to provide for their cultural needs; many want the same kinds of arts programs for themselves and their children as do Portland residents and it is logical that their tax dollars should also support these activities.

The options for regional public funding for the arts are discussed in Part IV of this report under recommendation IV.3. Whatever funding option is chosen, some organization or agency will have to be given authority to collect and redistribute funds. The consensus appears to be that this entity should be METRO. Since METRO does not have a charter or home rule authority at this time, this may complicate matters. Any new authority, most especially a taxing authority, would have to be approved by both the state and voters in the local jurisdictions involved and there would have to be strong support from local governments. But if these obstacles can be overcome, Portland could begin to pave the way nationally for a regional

form of public sector arts administration that will undoubtedly be widely imitated in the years to come. The arts in many cities are increasingly becoming regionalized and few cities can afford to support their growth without assistance from surrounding geographic areas.

One issue that has been raised in connection with METRO's involvement in the arts concerns overhead costs. There is a concern that another level of bureaucracy will siphon dollars for administration. Funds for the arts are scarce enough and some have complained that METRO's track record and its overhead charges in the administration of MERC facilities is not encouraging in this regard. Parallel administrative fees, duplicated bookkeeping systems, and other inefficiencies have added to the taxpayers' burden according to some critics.

Whether or not these complaints are fair or well founded, it is essential that METRO's role in the proposed regional arts plan be limited to that of collector and distributor of funds. The distribution will be by formula agreed to by the various local governments involved and the recipients will be designated local arts councils. METRO will have no role in programming or grant-making to arts organizations. Thus, for this limited funds management service it is anticipated that only a very modest overhead will be charged. Other agencies with proven track records in arts administration will be responsible for the actual program administration and service to the arts community.

**Recommendation III.9:**

A substantially restructured Metropolitan Arts Commission should play a central role in administering arts programs regionally.

In the proposed regional approach to public sector funding and administration of the arts, METRO will serve as the agency collecting and distributing funds. It should not become a regional arts council. Instead, MAC should be substantially restructured to play a central role in regional administration of the arts. This recommendation is based on an organizational assessment by the consultants of MAC's current track-record in program delivery, administration, and level of agency credibility throughout the region.

It is important to underscore that the consultants are *not* recommending that MAC, once it is restructured, become the sole arts council for three

counties. There is, in the region, a maturing network of local arts councils which has been developing arts programs locally and these councils should continue to be nurtured under the new system. The newly structured MAC (which for the purposes of this report we will call the Regional Arts Council) should assist in the continued development of other local arts councils. It should also take a leadership role in planning, coordination, and administration of the arts, offering technical assistance, information, and in some cases money on a regional basis.

An interesting model of such a regional arts council, from the point of view of some of the programming services offered, is The Metropolitan Council in St. Paul, Minnesota. Serving a seven-county region, the agency offers technical assistance, forums and workshops, publications, cultural planning for the region, and grants to presenting organizations offering programming to their local communities. In many respects, this agency is more modest in scope than what is proposed for Portland inasmuch as its only funding is provided by the state and other agencies handle local public funds. Nevertheless, its programming portfolio is of interest and is described in more detail in Appendix C, page C.12.

The model in which MAC becomes an arts agency with a regional focus for a three-county area will, at least in some respects, simply continue a trend which has been going on for a long time. MAC is already a designated regional agency of the Oregon Arts Commission; it has administered public art activities for METRO; and it has provided technical assistance and other regional programs for some time, albeit on a limited basis. MAC's primary focus up to this time has been on Portland and Multnomah County and that will have to change. A regional service area and a closer link with METRO presupposes weakened ties to the City of Portland and Multnomah County. It also assumes that elected officials and the boards and staffs of local arts councils throughout the region will accept the concept of a lead arts council for the region.

What may help in this regard is the fact that many in the region already seem to support the concept. In general, there is fairly good feeling about MAC's role as a regional agency, including among local arts council representatives in the region who were interviewed for this report. The consultants met individually and in groups with many of these individuals from around the region. There was a recognition that some of their needs would be well served by a strong, restructured Metropolitan Arts Commission with a regional focus. Those needs mentioned included:

- information, regional directories, and networking
- assistance with block-booking of performing and visual arts programs throughout the region
- assistance with joint marketing efforts
- cooperative private sector fundraising in which the various agencies might form a consortium and share funds
- a calendar clearinghouse
- touring services of Portland-based organizations
- general technical assistance
- cooperative arts education programs.

All local arts councils want some assurance that their communities will benefit directly from a regional funding plan. However, there is already a good deal of receptivity to the idea of the new Regional Arts Council providing technical assistance, planning leadership, programming, and money.

**Recommendation III.10:**

In order to carry out its new functions as a regional arts council, the Metropolitan Arts Commission should be restructured as a 501(c)(3) private nonprofit corporation.

The Metropolitan Arts Commission is currently a City agency which maintains contractual links to a number of other jurisdictions and authorities such as Multnomah County, METRO, and the School District. If the recommendations of this report are followed, MAC will need to be restructured to become a regional organization serving many jurisdictions. Under these circumstances, the consultants recommend that it be structured as a 501(c)(3) organization for the following reasons:

- The new agency/organization should not be under the jurisdiction of any local government, municipality, county, or METRO. If it is to serve all, it must be under the direct control of none.
- It must operate efficiently with a minimum of red tape. It must be possible to process contracts and payments quickly without the usual bureaucratic requirements of large governmental jurisdictions.

- It should be able to hire and fire with a minimum of red tape, based on sound personnel policies, but without the restrictions of government.
- It must be able to compete in the fund-raising marketplace (units of government are generally at a disadvantage in this regard since private funders often feel that their taxes already provide funds for governmental agencies).
- It should be able to attract and manage endowment funds.
- It must be able to put together a Board of Directors with strong expertise and leadership capability. Currently, MAC appointments are made by elected officials and this does not assure a balanced governing structure composed of top community leadership.
- It must be able to engage in arts projects which are controversial without worrying about the ramifications of being a representative of local government.
- Its Executive Director must be able to report to the Board without having to answer to another civil servant.

All of these arguments suggest a private, nonprofit organization. It is interesting to note that as this report was being written, the Metropolitan Arts Commission was in the process of setting up a private nonprofit corporation to facilitate the administration of the new arts-in-education program which it has agreed to administer next year. Staff felt it was necessary to do so because of the contracting, fund raising, and administrative issues mentioned above. The consultants believe that this new nonprofit should become the basis for the Regional Arts Council and that over time it should replace MAC altogether.

Given its long history and successful track-record, much of what is strong about the Metropolitan Arts Commission should be retained. This means, to the extent possible, efforts should be made to keep as many of the current staff members as may be willing to stay on. As is usual in such cases of agency transition from the public to private sector, employees should be offered jobs in the new nonprofit, given the alternative to take comparable vacant jobs in the City administration if they exist, or be provided with job counselling and relocation assistance at City expense if they do not choose either of the first two options (obviously, City personnel policies will have to be followed). There should be a careful analysis of benefits to assure that employees do not lose substantially by leaving the City's employ.

While current employees need to be protected from losing medical, retirement, and other benefits, this does not mean that the public sector structure should be duplicated in the new nonprofit. Indeed, one of the benefits of the nonprofit structure is that it will probably bring about greater efficiencies. A consultant should be hired to help plan the conversion and analyze the most cost effective ways to set up the administrative structure. A recent conversion of an arts council from a public to private institution in Scottsdale, Arizona might be studied as a model. In that City, the conversion process took approximately eighteen months. It is also interesting to note that The Metropolitan Council in St. Paul, one of Minnesota's designated regional arts councils serving a seven-county region, is now in the process of becoming an independent nonprofit organization having been a part of municipal government (cf. Appendix C, pages C.11-12).

The consultants recommend a Board not to exceed 18 director/trustees (though there could be fewer). Terms should be for three years and should be staggered. Six years should be the limit that any director/trustee may serve before going off the Board for at least one year. Certain appointments should be allowed by various jurisdictions that provide funding either directly or through levied taxes. Perhaps a limited number of appointments (three or four) could be made by elected officials, though with the various proposals now being studied to consolidate and reorganize local governments, it may be premature to recommend precisely which jurisdictions would make appointments. Initially five additional director/trustees should be elected by the Arts Plan 2000+ Steering Committee. These appointed and elected director/trustees would then form the core group which would elect additional trustees through a nominating-election process. Subsequently, all trustees would be elected except those appointed by the local jurisdictions.

The consultants cannot emphasize enough how important it will be to provide top leadership to this initial board. The whole question and problem of leadership is dealt with elsewhere (cf. recommendations IV.1 and IV.2). The Regional Arts Council offers one place in which such leadership can be nurtured.

After the first draft of this report was written, many arts professionals expressed great concern that if the new regional arts council recommended in this section were actively involved in private sector fundraising that this would siphon existing dollars from their own fund-raising efforts. Strong opposition was expressed regarding a united fund for the arts in which the



private nonprofit arts council would raise corporate, foundation, and even individual gifts on behalf of all the arts groups in the community. The consultants have the following reactions to these concerns:

1. A united fund for the arts is not in the best interests in Portland or the region. The consultants agree that this is not an appropriate role for the new regional arts council.
2. There may be some funders who would only give to the regional arts council. In particular, funders interested in programs of a regional nature or involving consortia of organizations might only be interested in grants and contributions to the council. In some cases, this "new" arts money might benefit some of the very groups that are now expressing concern.
3. There may be some organizations that cannot themselves raise large grants and deferred and/or endowment gifts because they are not stable enough to satisfy donors concerned about responsible, ongoing financial management. These organizations would benefit from the regional arts council which could raise money on their behalf.
4. The regional arts council might have a stated policy that it does not encourage funders to redirect existing arts dollars away from other organizations but is interested in expanding the total amount of money being contributed to the arts of the region.
5. A priority of the new regional arts council should be on increasing public funding for the arts. But in some cases, this might only be possible if it can match new public money with private dollars.

In sum, while a united arts fund is not recommended, and while great care must be taken to avoid competition with constituents for funds, the regional arts council should take a strong stance with respect to private and public sector fund raising as part of its organizational emphasis. The private sector funds that it raises should be primarily for the benefit of its constituents, not for its own basic operating costs. This should go a long way toward assuring those constituents of the merits of the suggested approach.

**Recommendation III.11:**

A formula for redistribution of arts funds should assure local municipalities that they will have cash available for local needs.

While many people from outlying areas who were interviewed for this project saw the Regional Arts Council taking a lead in the new structure, they wanted to be sure that local municipalities and agencies would receive some of the funds that were collected regionally. This view was stated even more emphatically by local elected officials. If a regional taxing mechanism is put in place, these officials want to be sure that at least some of the funds are returned directly so that local arts councils can carry out programs and activities.

Such an approach is used in the Denver area where a regional taxing mechanism has been implemented. The mechanism — described in detail on Appendix page C.10 — returns to local arts councils approximately 10% of the total tax collected. While there are many differences between Denver and Portland, careful analysis of the Denver formula would be appropriate as background in designing a formula for the Portland region. Some form of per capita calculation should probably be an element in whatever formula is developed to decide how much any local arts council would be eligible to receive.

In considering a redistribution formula, it will be important to settle on criteria by which a local municipality can become eligible for funds. The consultants suggest that only municipalities that have or are willing to form local arts agencies should be eligible to receive funds. The criteria for a local arts agency would be as follows:

1. Either tax-exempt nonprofit corporations designated by government or legislatively mandated agencies of government
2. Governance by a broad-based board which is reflective of the cultural, ethnic, and racial diversity of the area
3. Evidence of ongoing community cultural assessment and planning
4. At least one professional paid staff person
5. Year-round operations and provision of services in at least two of the following:
  - grants to artists and/or arts organizations

- programs which address the needs of ethnically diverse, racially diverse, economically disadvantaged, rural, tribal, older adults, people with disabilities, institutionalized individuals, and other underserved individuals
- organized technical assistance to artists and organizations in marketing, fund raising, planning, technical assistance, board development or other skills areas
- provision of information, coordination, and clearinghouse services in the form of newsletters, calendars, maintenance of a joint mailing list or other services
- fund raising on behalf of other arts organizations or artists
- cultural policy development or planning on behalf of city or county government.

**Recommendation III.12:**

The new Regional Arts Council should be used as a vehicle to raise public and private sector funds for the arts in the region, developing cooperative applications with other local councils when appropriate.

The new Regional Arts Council should not simply be a passive recipient of funds collected by METRO. It should be an aggressive fund raiser and its Board should understand that they will be responsible for giving and getting money. Initially, this role for the new organization will be controversial. Many organizations in the arts will probably resist the idea of another major player in the fund-raising marketplace. But the consultants believe that in the end this role will increase the total dollars flowing to the arts in the region and will help the small and medium-sized organizations gain access to institutional dollars that were unavailable to them in the past.

Fund raising initially might be program specific. That is, as special regional initiatives — such as initiatives in arts education or cultural tourism — are designed, outside funding should be sought both from the private sector and from public agencies like the National Endowment for the Arts. Funding consortia should be assembled so that funders can see that their dollars will benefit a number of institutions and geographic areas. The Regional Arts Council can play a central role in putting together these partnerships and submitting proposals on behalf of the consortia.

In time, the Regional Arts Council can seek regranting money. It would raise money from corporations and foundations (and perhaps federal agencies) and use this money for basic operating and project grants primarily for the small and mid-sized organizations in the region. It is well known that many institutional donors like corporations and foundations give most of their arts dollars to larger, more established organizations. This is partly because they trust the quality of the artistic product as well as the management. Smaller organizations are more difficult for them to assess and so they are often passed over for grants. But when a major service organization agrees to serve as a conduit for corporate, foundation, and federal funds and further agrees to adjudicate and monitor both the artistic and administrative performance of applicants, it is often possible to encourage contributions for smaller organizations (and even artists) as well. Over and over again, institutional donors have displayed a willingness to give money to smaller groups and individuals so long as there is sufficient oversight of the dollars on the part of the regranting agency. In time, this regranting role should be taken on by the Regional Arts Council.

Finally, the Regional Arts Council should also focus on the financial needs of the major arts organizations in Portland. At the present time, the basic operating grants to majors by the Metropolitan Arts Commission are inadequate. As regrant funds are raised for the small and medium-sized organizations, the Regional Arts Council may need to shift more public money to basic support grants to majors. Careful analysis of the practices in other cities will be helpful in establishing fair grant levels based on percent of operating budgets, absolute dollar levels, and other norms. Portland should seek to avoid the experience of those cities where major arts organizations bypassed local arts agencies and sought (and sometimes secured) line item support for their operations. In order to prevent this scenario, the "majors" must feel that their needs are also being addressed through this plan.

## Part IV

# Human and Financial Resources

One of the strong motivating factors for Arts Plan 2000+ was the need to identify resources for the cultural sector in the 1990's. Several factors lay behind this need:

- In the last 25 years, the Portland region has seen major growth in cultural activity, in the number of arts professionals and cultural groups, and in the size and budgets of arts organizations.
- In the last decade, several cultural organizations ceased operations (one performing arts organization went out of business during the period of the Arts Plan 2000+ planning process).
- At the present time, eleven of seventeen of the community's largest cultural groups carry accumulated deficits.
- In 1988, the new Portland Center for the Performing Arts was completed at a public investment of over \$42 million. However, no long-term funding source was put in place to maintain, upgrade or support the ongoing operations of the Center.
- In the past year, Oregon voters approved a property tax limitation measure ("Measure Five") which has significantly reduced the amount of property taxes and other charges that may be levied by state and local governments and has reduced the public funding base for the arts in Portland and the surrounding region.
- Underserved constituents and new needs in the arts have become apparent through the planning process; resources must be found to pay for them.

- New capital projects are being contemplated (including a proposed \$30 million expansion of the Art Institute) which will place great demands on the resources of the community.

All of these factors raise the question of whether there are sufficient financial resources to support the cultural needs of Portland and the region. But there is another question as well. Are there the kind of human resources in the area to marshal the funding which the arts seem to require, especially at a time when there are competing demands? The answers to these questions form the basis for this part of the report.

### *Human Resources/Leadership*

#### **Recommendation IV.1:**

A leadership group must be assembled which will devote itself primarily to the urgent needs of the cultural sector in Portland and the region.

The consultants believe that the cultural sector's most urgent need at the present time is not more public or private funds. These are merely symptoms of a more basic requirement. The greatest need is developing a corps of active, prominent community leaders for the arts. This does not mean leaders who place the arts on a list of ten or fifteen priorities for the community. It means individuals who personally champion the arts and culture, who provide leadership through their own financial contributions, by their public statements, by their attendance, and by their willingness to articulate why the arts are critical to Portland and the region's future. Without such leadership, the vision, the goals, and the programs identified in this plan cannot be realized and the financial resources required cannot be marshalled.

The hundreds of interviews conducted for this plan revealed a striking fact. While there is broad general support for the arts in the region, there are few individuals, outside of those already working professionally in the arts, for whom the arts are a burning passion. The arts are seen as an amenity along with many others. The area's lifestyle is seen as pleasant, and the natural beauty of the area, the recreational opportunities, the quality urban environment and the arts are seen as playing a role in that. But there are

few individuals who place the arts at the top of this list and even fewer who want to see Portland emerge as a world-class arts city. This is in marked contrast to other cities of comparable size and with developed cultural amenities.

Some of the comments from the interviews are instructive:

*"We have no ambitions here of being another San Francisco, a Los Angeles, or even a Seattle. Culture is important but we do not need to have the best symphony or the best art museum. As long as what we have is relatively good, most people will be very happy."*

*"The needs of the arts community have to be seen in the context of other needs — and there are many. I would say support for the arts is on a second rung of priorities in terms of importance."*

*"We don't have the broad-based leadership that supports culture in a big way here. Part of that is that we don't have a lot of home-based Fortune 500 companies. But that isn't really the underlying issue because there is a lot of wealth in Portland. You have to understand the nature of leadership here. People don't want to get their picture in the paper in this town; they want to keep it out of the paper. And that works against the arts. Leadership can be perceived as showiness . . . and Portlanders don't like that."*

*"The community value in Portland is citizen involvement, consensus. Pioneer Courthouse Square — a citizen-initiated project in which thousands of bricks were sold for a few dollars apiece — is one of the community's proudest achievements. Portlandia is another because it was public art that grew out of a public process. The few leaders that do step forward and put their names on buildings often take a lot of flack."*

These statements are characteristic of scores of others. They reflect a leadership problem for the cultural community. Indeed, when consultants asked who were the real leaders in the community in support of arts and culture, only two or three names were consistently mentioned.

Perhaps no symbol is more poignant and indicative of the problem than the so-called "Intermediate Theatre" at the Portland Center for the Performing Arts. This jewel of a performing space remains unnamed after five years "on the market." No donor has stepped forward. The price tag is

\$500,000 — a relatively low figure given the contribution level associated with comparable spaces in other cities. There are undoubtedly many factors which have contributed to this situation, but the symbol remains. Some would say that the arts are simply not important enough for leading citizens to lend their resources and their names to one of the most important cultural monuments in the City.

What is the solution?

First, it is crucial to recognize the seriousness of the problem. No city in the United States has succeeded in developing and maintaining a vibrant and healthy cultural community without a leadership group of *private* citizens who champion the arts and support them financially. Interestingly enough, there are cities in which culture thrives without strong *public* sector support (Philadelphia, for example, has negligible public support for its cultural institutions and facilities; but private leadership is always very strong). In the Portland region, private sector leadership must be further developed. The cultural community will survive in some form no matter what happens. But unless a leadership group emerges that is broader than the financial contributors to one or two organizations, the arts will survive in a much diminished fashion.

Second, it is important to understand that the public sector alone cannot solve the problems facing the cultural sector. Many people interviewed for this project emphasized the need for more public funds for the arts. Unfortunately, this masks two important facts:

- Public funding will probably never be sufficient to completely cover the ongoing income gap in the cultural sector which has been estimated by some people at several million dollars a year exclusive of capital needs.
- Public funding will be diverted to other sectors unless there is strong leadership from the private sector (outside of the arts professionals themselves) which is putting pressure on the elected leadership to allocate scarce resources to culture.

Third, individuals who are taking a leadership role for the arts must not be timid in championing the arts over other sectors of need in the community. Yes, there are many challenges and problems in Portland and the surrounding region that need to be addressed — education, economic development, crime, and cultural diversity, among others. But the arts promote and con-



tribute to solutions in all these areas. They are an economic generator which helps attract business; they contribute to basic skill learning; they provide a productive vehicle for celebrating cultural diversity; they even offer preventive measures to fight crime by offering recreational outlets for young people. Until leaders in the area are prepared to take a strong stand with respect to the *central* place of the arts in the community, the arts will always be relegated to a second-level priority.

Fourth, there must be a recognition that generous support and leadership on behalf of the arts does not have to be elitist and fits well with Portland's image of itself as a populist City. Indeed, if the cultural sector does not receive adequate support, it is not the major (so-called "elitist") organizations whose survival is most at risk. *It is the smaller, community based organizations, the multi-cultural organizations, the arts education programs in public schools that will not survive.* Strong support of arts and culture is a vote for all the citizens.

Finally, active support of the media must be a major goal of any leadership group. Currently, the media in the Portland area does not do an adequate job in promoting the cultural sector or its needs or in pointing out the various benefits that the arts provide to the region. The emergence of strong leaders who champion the arts must be coupled with a long-term effort to convince those who establish policy for the media to take a more active role in supporting the arts through editorial policy and more extensive coverage.

**Recommendation IV.2:**

A small group of leading private citizens must be assembled who will work to find ways to develop a long-term resource base for the broad vision of Arts Plan 2000+.

Arts Plan 2000+ has been a broadly-based citizen-driven planning process. Like so many processes in Portland, it has promoted wide involvement by many people. What it has not had is intimate day-to-day participation from leading individuals outside of the arts community itself. The next phase of the planning process must bring such individuals into the center of the planning and implementation process.

Some high-level representation of the core group of leading businesses must be on board to insure a successful private sector initiative — companies like 1st Interstate Bank, Fred Meyer, PacificCorp, Portland General Electric, Standard Insurance Company, Tektronix, US Bank. These individuals should not be seen first and foremost as bringing significantly increased contributions from their individual companies. Their role is to help with a diversified strategy to raise the level of philanthropic activity, much of which will come from individual donors.

While the emphasis of the activity of this group will be on identifying new resources in the private sector, these individuals who participate must also be willing to advocate for a larger measure of public support as well. The solutions to the problems of the cultural sector in the Portland region will include a mixed strategy and strong leadership will be required to solve the problems.

Perhaps the most challenging aspect of this recommendation is that it requires a leadership group which embraces the broad vision of Arts Plan 2000+, not just the needs of any particular organization. Indeed, the success of Arts Plan 2000+ may hinge on this very point. It is relatively easy to find individuals who will develop a commitment to a specific organization (like a museum) or project (like a new cultural facility). It is far more difficult to generate the same commitment to a community-wide or region-wide cultural plan which may actually hold back the short-term growth of any single organization.

What are the logistics involved in bringing together such a group? In some communities, they are informal and private. A handful of prominent citizens talk to one another and decide to make things happen. In other cases, the coalition may be developed by a leadership group of funders who organize themselves informally into a committee. Other models involve a formal organization such as a local chapter of Business Committee for the Arts which, unlike Portland's chapter, focuses primarily on issues of funding. In still other cases, the leadership is organized around the governance structure of a local arts council, although this generally requires that the council be a nonprofit organization where appointments to the board are not controlled by elected officials. It is unclear at this time which model may be best for Portland although the question should be discussed as part of the continuing dialogue of Arts Plan 2000+.

## Financial Resources

As has been pointed out in Part III of this report on Infrastructure, arts organizations in the region are both under-capitalized and heavily reliant on earned income. There are several explanations that are given locally for this fact. But the consultants believe that two are especially relevant:

- First, the area's per capita level of public support is low by national standards. City and County funding is less than a third of that of many comparable communities and the problem is compounded by the low per capita level of state appropriation to the Oregon Arts Commission.
- Second, levels of private giving are also low by national standards. Participation levels — the percentage of individuals and businesses contributing to the arts — is within national norms according to The Wolf Organization, Inc.'s survey (as a comparison, 28% of attenders in the Portland region said they make monetary contributions as compared with 35% of respondents to The Wolf Organization survey in Dallas). However, the giving levels in Portland and the surrounding region, as reflected both in lead gifts and the average dollar level of gifts and sponsorships, are low.

## Public Funding

### **Recommendation IV.3:**

Portland and the surrounding region needs to develop increased sources of public funding to support arts and cultural needs as outlined in this plan.

As pointed out by the Task Force on Resources for Arts Plan 2000+, Portland and the surrounding area is extremely low in its per capita public support of the arts. In a comparative survey released by the Metropolitan Arts Commission at the beginning of the decade, the agency offered a chart providing comparisons between Portland, Seattle, San Francisco, Los Angeles, San Diego, Denver, and Dallas in public support for the arts. The average per capita expenditure for the arts in the other cities was \$4.39 (ranging from \$4.00 to \$4.95). Portland's per capita expenditure was \$1.39 or roughly a third of the level of the other cities. More recent figures com-

piled by The Wolf Organization, Inc. showed even greater disparities. The figures for various cities nationally included Atlanta's per capita expenditure of \$11.80; Winston-Salem, North Carolina's at \$8.54; and the updated Dallas figures at \$5.98. Meanwhile in FY '91, Portland's per capita figure has slipped to \$1.30.

Some people have complained to the Metropolitan Arts Commission that these figures are not comparable because the public sector in Portland also supports its arts facilities through other mechanisms which do not flow through MAC and are not part of the \$1.30 figure. Concerns have been raised about the relevance of these figures inasmuch as the City of Portland also contributes to the PCPA operating subsidy, to debt service for the PCPA, and, along with other local jurisdictions, to percent for art on public construction. While it is true that separate monies do flow to Portland-based facilities and percent for art, this is true in other communities as well. Furthermore, the facility subsidies in Portland only serve performing organizations while in many communities they serve visual arts facilities as well.

More to the point, there are a number of reasons why city comparisons generally do not contain these kinds of support mechanisms.

- Operating subsidies to performing or visual arts facilities are often difficult to track since cities may provide them through General Services or through employee contracts which are not broken down with respect to specific facilities.
- Capital construction expenses and debt service is quite variable. In a city like Dallas, which has had a policy of 50% subsidy on the building of all major cultural facilities, it is very high. In other cities, high level of outlays may be an artifact of different bookkeeping methods. In both cases, Portland's per capita figures would be low by comparison.
- Similarly, public art funding is an artifact of the size of the city and the amount of public construction and it can fluctuate tremendously from year to year.
- Finally, many cities heavily support arts programs through a variety of agencies other than their local arts agency (Portland does not). In some, the museums are actually city departments which receive the bulk of funding from local government and in others various free cultural programs are offered to local citizens through departments and divisions other than an arts council or commission. These

figures are again difficult to track so they are not included in the city comparisons.

For all these reasons, The Wolf Organization, Inc. limits its comparisons to local public appropriations through local arts agencies for ongoing needs of the arts exclusive of capital costs, public art, and facility-related operating costs. However, the consultants did do an in-depth analysis of the complete money flow in a community of almost identical population to Portland — Charlotte, North Carolina. The comparative per capita figures are shown below.

	Portland Charlotte	
Local publicly appropriated money for ongoing programs and operations	\$1.30	\$5.53
The above plus operating subsidies for facilities (based on last year's PCPA subsidy of \$897,507)	\$3.35	\$8.40
The above plus percent for art on public construction (based on MAC contracts with City, County, School District, and METRO amounting to \$220,000)	\$3.85	\$9.25
The above plus debt service on capital construction for facilities (Portland's figure is \$2.5 million/yr.)	\$9.56	\$16.82

Clearly, the public sector in the Portland area does not do as much for the arts as is done in other cities. Yet, the problem does not seem to be citizen resistance. In the general public survey conducted by The Wolf Organization, Inc., an exceptionally high four out of five respondents supported the idea of City and County arts appropriations for cultural activities. This is a remarkable statistic, especially in the wake of local tax sentiments reflected in the November, 1990 vote on Measure 5 (the survey was conducted the following February) and it was particularly impressive that three out of four respondents who were not attenders at arts events still supported the concept of governmental appropriations.

In spite of these findings, difficult challenges lie ahead for the cultural community in trying to do something about the current situation regarding inadequate public appropriations for the arts:

- The recent passage of Measure 5 has made the task of finding revenue sources far more challenging. Local governments are exploring the same revenue sources as arts advocates in their desire to support basic services.
- Many people believe that the operating deficit of the Portland Center for the Performing Arts (estimated at between \$1 million and \$1.3 million a year according to a special Task Force) is the major financing problem in the arts that needs to be solved. In fact, the existing operating gap of arts organizations and even the most basic set of initiatives recommended by this plan suggest an *additional* annual requirement over and above the PCPA needs of approximately \$3 million (based on initial estimates by the Resources Task Force). This does not include other important needs such as ongoing subsidies for visual arts facilities or additional one-time capital expenditures (like neighborhood facilities), deficit elimination, or other kinds of necessary capital formation (such as the building of cash reserves and endowments). It also does not include adequate resources to address the recommendations of this plan on a regional basis.
- In 1987, a 2% increase in the bed tax for use to support the arts was voted down. The City bureaucracy and the arts community failed to include the hospitality industry in planning for this initiative. Today, there is feeling in certain quarters that an increase in the bed tax, one of the logical sources of new dedicated public revenue for the arts, is not an option.

How might the challenge of producing more public funding be addressed? There are several logical avenues to explore:

#### 1. Securing agreement on a regional funding approach

An effort must be made to convince the entire region to go in together on a regional financing initiative for the arts. This will only be possible if outlying communities see a direct benefit to themselves with at least a portion of the money raised flowing back to the communities and some additional amount of related services. The consultants recommend some type of formula which guarantees funding to designated local arts councils as well as regional programs that serve citizens of each County.

What goal should be placed on a regional funding mechanism? The public sector share required to solve the current financial problems of the arts in

the Tri-County region should probably be a minimum of \$5 million annually. (This figure is calculated by adding the \$777,000 currently appropriated by the City and County to MAC, the \$1.3 million required to eliminate the PCPA deficit, and the \$3 million as identified by the Resources Task Force to stabilize the current operations of arts organizations and implement minimally some of the recommendations of this plan.) While the private sector must also provide considerable resources, these would be over and above the public sector requirement.

Based on a per capita expenditure on the arts of \$4 per person (which is low but roughly in line with many other communities cited above), the region could come close to meeting the \$5 million figure. The total public expenditure based on 1989 population figures would be:

Clackamas County:	265,500 people times \$4 =	\$1,062,000
Washington County:	295,000 people times \$4 =	1,180,000
Multnomah County:	581,000 people times \$4 =	2,324,000

Total:	1,141,500 people times \$4 =	\$4,566,000
--------	------------------------------	-------------

## 2. Increasing the transient occupancy tax

The consultants believe that at least part of the funding challenge could be solved by an increase in the transient occupancy tax and that it would have some chance of success if funds were split between the arts and the hospitality industry. A possible additional element might be a \$100,000 hold-back of funds each year to promote cultural tourism (cf. recommendation VI.5 for one possible use to which these funds might be put). *It is imperative that the planning and implementation of any initiative involving the transient occupancy tax be done jointly by the two industries from the beginning.*

How would such a tax relate to current practice with respect to the hotel/motel tax in the three counties which would be part of the plan?

- Multnomah County currently levies a hotel/motel tax of 9%. Within Portland, two thirds of the receipts are collected by the City, with the remainder to the County. If an incorporated City has a hotel/motel tax, the County reduces its rate so that the total rate does not exceed 9%; however, the cities of Troutdale and Gresham have agreed not to reduce the County portion. County

collections from the transient lodging tax are dedicated to a fund for marketing the Convention Center. City of Portland funds go into the City's General Fund. Each 1% increase in the Multnomah County tax rate can be expected to produce approximately \$1.17 million in revenue.

- Washington County collects a 7% hotel/motel tax. A portion of total receipts (5% of total) are returned to hotels for the costs of monitoring tax collections. The Washington County Fair Board and the Visitors and Convention Bureau receive 14.2% of the tax collections each. The balance of hotel/motel tax revenues goes to the County's General Fund, unless cities within the County have entered into a revenue sharing arrangement with the County, in which case the revenues are divided equally among the cities and the County. Each 1% increase in the Washington County tax rate can be expected to produce approximately \$315,000 in revenue.
- Clackamas County collects a 6% hotel/motel tax. A small portion of receipts (1% of the total) are kept by the County as reimbursement for collection of the tax. The remainder, up to \$500,000 in collections, is divided. Half goes to the Chamber of Commerce; the other half is split between Clackamas County (for construction, operation and maintenance of the Fairgrounds) and participating incorporated cities within the County. Beyond \$500,000 in collections, the County continues to collect 1% of the total for administration. The County then keeps one sixth of the remainder for the Fairgrounds, and the balance is distributed to the Chamber of Commerce and the participating cities. Each 1% increase in the Clackamas County tax rate can be expected to produce approximately \$147,000 in revenue.

Based on these figures, the aggregate increase if taxes were raised by 2% in all three Counties would be approximately \$3,265,000. If half of that were allocated to the arts, this would amount to \$1.6 million. If, on the other hand, all taxes were set at 10% in the three Counties, the aggregate increase would be \$2.7 million, half of which would be \$1.35 million. While not a complete solution to the problem, this would certainly be a start.

### 3. Entertainment taxes and other dedicated public sources

There has been considerable discussion about amusement or entertainment taxes as a dedicated mechanism to fund the arts. At the present time, a user fee is charged on tickets sold for events at the Memorial Coliseum, PCPA,



and the Civic Stadium, although Trailblazer tickets are exempted. In 1991, the projected income from this source is \$1.2 million and the proceeds have been targeted to pay for improvements to the Coliseum, Stadium, and Portland Center for the Performing Arts.

An entertainment tax would take a different and more comprehensive approach, charging a tax not only on tickets but on video rentals, admission to movies, and other entertainment events (perhaps including night-clubs and performing arts events). Research on how much will be produced from these sources is still under way. However, there appear to be many competing interests vying for funds that might come from this tax source, including those looking to cover the operating deficit of the PCPA.

Other dedicated taxes are being explored by City staff and the various planning groups charged with solving community financing problems. The consultants believe that none of these funding options should be ruled out by the arts community. However, it is necessary to understand that the arts are most likely to be successful in garnering dedicated funding if the arts community forms partnerships with other interest groups who are also looking for long-term funding stability. Splitting revenues between different interest groups will help any single constituency garner broader support.

#### 4. A sales tax approach

Oregon currently has no sales tax but there are signs that a sales tax could be enacted as part of the response to the challenges of Measure 5. If a state sales tax is put in place, there may be the possibility of local governments levying additional sales taxes and if this were to be the case, the arts interests should be prepared to work together in a coalition to develop a dedicated flow of these funds for cultural needs.

An excellent model exists in Denver where a six-county metropolitan area was designated as a "Cultural Facilities District." Voters approved a cultural tax (described in more detail in Appendix C of this report on page C.10) for the District of 10 cents on each \$100 purchase and this has produced \$15 million, costing tax payers on average about 57 cents per month. The distribution of the funds, which is by formula, is very broad and it includes 65% for major organizations, 25% for smaller organizations, and 10% for local arts councils.

Using population figures for the three-county area around Portland, a share of a sales tax that yielded 57 cents per month per capita dedicated to the arts would produce \$7.8 million which would not only be sufficient to cover the income requirements currently proposed as a minimum in this report but would also fund some of the additional initiatives that have been recommended by the Task Forces. The monies might also be dedicated in early years to a "cultural endowment" which, over time, might make the sales tax for the arts unnecessary.

However, before arts groups set their sights too high, it is important to remember that the success of an initiative of this kind will depend on the broadness of the coalition supporting it. The arts community may wish to ally with the zoo and various botanic and science-oriented organizations (as was the case in Denver) and may also wish to consider alliances with other types of cultural organizations including libraries.

**Recommendation IV.4:**

Any public funding mechanisms that are proposed should seek to deal with the full scope of challenges and needs facing the arts community.

As has already been mentioned, there has been a major focus in Portland on the need to address the operating deficits of the Portland Center for the Performing Arts. A parallel planning process to Arts Plan 2000+, under the auspices of METRO (and analyzing Metropolitan Exposition-Recreation Commission (MERC) facilities), has been looking at a variety of facility-related issues — its PCPA sub-committee has been exploring various ways in which these operating deficits can be funded in the future. Many of the same mechanisms explored in this report have been analyzed through that planning process and have been issued recently in a sub-committee report which was reviewed by Arts Plan 2000+.

There is a great danger in regarding the PCPA deficit as the critical challenge facing the arts in Portland and the surrounding area. To solve that problem without addressing looming facility problems in the visual arts or such issues as the operating deficits of other arts organizations, multi-cultural arts programming, neighborhood facilities, arts education, cultural tourism, or the many challenges brought up by this planning process would be a mistake. Quite frankly, to solve the PCPA funding problem first will

make it extremely difficult to secure funds for anything else that is arts-related. Many people in the community will feel that the "real" problem is solved and that arts advocates ought to be happy with what they got. In reality, however, no one, not even the PCPA, will be well served if there are fewer organizations locally that stay in business or can operate at a level to keep the stages lit, the doors open, and the seats filled.

Portland has already learned the lesson of half solving a funding need. PCPA was built with very little thought given to its operating needs and the consequence has been the crisis which the MERC committee is attempting to solve. It would be tragic to make the same mistake again. Those in Portland and the surrounding region must look at the totality of needs in the arts community and solve them together. To fail to do so will only compound the problems in the future.

In this connection, it is well to consider not only linking the needs of PCPA and Arts Plan 2000+ for dedicated funding, but connecting both of these efforts to the need to find a public subsidy for a new arena. If this can be accomplished, a broad coalition of interest groups will be involved in advocacy efforts.

### Private Funding

**Recommendation IV.5:**

A concerted effort must be made to upgrade private sector giving levels in Portland and the surrounding area.

There was wide agreement in the Resources Task Force and among interviewees for this project that giving from the private sector must increase if the arts are to flourish in the Portland area. Much of the discussion about how to increase private giving focussed on expanding the number of givers, both corporate and individual. However, the consultants believe that, at least in the short term, far greater focus must be placed on *upgrading* the giving levels of current donors.

It is difficult to establish industry norms regarding how much on average people give to arts organizations and how large contributions are for organizations of various budget sizes. However, the consultants can say, based on their experience in other communities, that Portland appears to

lag behind in terms of giving levels, and that especially larger gifts, trustee contributions, and corporate sponsorships are lower than for comparable organizations in many other communities. Development directors and other staff from larger arts organizations in Portland discussed giving levels with the consultants. "Large" gifts for annual operations in many instances came in at between \$1,000 and \$5,000 while comparable organizations in other communities can generally count on \$10,000 to \$25,000 gifts on a regular basis. Capital gifts were also low as has already been noted in conjunction with the price tag associated with the naming of the "Intermediate Theatre" at PCPA.

The conventional wisdom in Portland is that more donors must be found, that the circle of givers must be widened. While this may be a good long-term strategy, the consultants believe it is not the best use of time and resources in the short term. It is far easier to get a \$100 upgrade from an existing donor than it is to convince a non-donor (or several) to contribute the same \$100. Development specialists can document in many acquisition campaigns that the costs associated with acquiring new donors are almost as high as the contributions that are taken in (the pay-off comes in the second year when first-time donors become repeat donors).

In addition, it is well to remember the 90:10 rule (some organizations claim it is an 80:20 rule but the principle is the same): 90% of contributions can be expected to come from the top 10% of donors (or, at a minimum, 80% from the top 20%). In the Portland region, top donors have not been educated to give as generously to the arts as they do to other sectors like higher education (Reed College's successful capital campaign which raised tens of millions of dollars locally was cited as an example).

What are specific strategies that might be put into effect? There are many, among which are the following:

- Staff of specific arts organizations should begin to gather data on comparable organizations in other communities. Some of this information may be available from national arts service organizations (e.g., American Symphony Orchestra League, Dance USA, etc). In other cases, it may be necessary to call individual organizations in other cities. Information should be collected in various categories:
  - total number of individual givers
  - total amount raised from individuals

- 
- average unrestricted individual gift
  - highest unrestricted individual gift
  - average restricted individual gift
  - highest restricted individual gift
  - total number of corporate givers
  - total amount raised from corporations
  - average unrestricted corporate gift
  - highest unrestricted corporate gift
  - average restricted corporate gift
  - highest restricted corporate gift
  - range of prices associated with corporate sponsorships
  - average unrestricted trustee gift
  - highest unrestricted trustee gift
  - average restricted trustee gift
  - highest restricted trustee gift
  - The comparable information should be used to urge trustees, individuals, and corporations to give more. Key trustees and individuals in the leadership group discussed under recommendation IV.1 should take initiative in increasing their own gifts and using a "bully pulpit" approach to "educate" and "encourage" donors to bring their gifts in line with the growing quality, importance, and needs of arts organizations.
  - Arts organizations themselves must set higher giving ranges. Often a person giving at the \$25 level will give \$50 if that is the lowest numerical category listed on a giving card (always include a category of "other" for those who want to give less). Be sure the top categories range sufficiently high given industry standards.
  - Boards of Directors should set challenging giving levels for themselves *as a group*. There is a strong anti-elitist sentiment in Portland and the surrounding area and many people are resistant to setting minimum giving levels for individual trustees. This is a reasonable position so long as the Board, through its Development Committee, pushes itself as a whole to give at a reasonable level (given industry standards) and that someone on the Board takes responsibility for soliciting donors individually.
  - Far more information should be made available, perhaps through the Metropolitan Arts Commission and other groups, about national

trends in giving to the arts and expected giving levels. Outside speakers, newspaper interviews, newsletter information, and other documentation should be made widely available throughout the community.

- Corporate sponsorships should be made more expensive. However, arts organizations must establish some standards among themselves so that major organizations increase sponsorship costs as a group.
- Donor upgrading efforts should occur at every level and the efforts should be personalized. A \$100 donor who upgrades to \$150 is a valuable asset, potentially representing an enhanced giving level for years to come.

Perhaps most important, it must become widely known that giving levels represent a major problem which hinders the cultural development of the Portland region. There is a large measure of civic pride in Portland and there may be a number of individuals who will step forward to address this issue.

**Recommendation IV.6:**

Far more emphasis should be placed on planned giving as a way to stabilize the finances of arts organizations, particularly larger ones.

As arts organizations in the Portland area face the challenge of under-capitalization, accumulated deficits, inadequate cash reserves, and tiny endowments, they should be aware that the largest source of funding for these things nationally is planned, or deferred, giving. The consultants have been told that significant individual wealth exists in the Portland area, particularly among older people, and this constituency is ideal for this type of giving.

Planned giving uses a variety of vehicles to provide individuals a way to contribute to charities at the same time as they reduce their tax burden. Planned gifts usually involve substantial sums and take the form of highly appreciated assets (for example, insurance, market and non-market securities, or tangible personal property — artwork, jewelry, antiques). However, there are planned giving vehicles which allow participation for as little as \$1,000 and permit the donor to receive the full advantage of a tax deduction and investment income during his or her lifetime and that of another designated beneficiary.

There are a wide range of vehicles that may be employed, and among the most suitable are the following:

- **Bequests** are gifts of any amount or form made outright to an institution in a donor's will. The advantage of bequests is their simplicity. The disadvantage to organizations soliciting them is that during a donor's lifetime they are *revocable*, which means that the institution has no certainty that the donor will not change his or her mind about the gift.
- **Pooled Income Funds** operate like a mutual fund. An individual's gift is pooled with similar gifts and invested by the institution. In return the institution agrees to pay income to the donor or a designee for their lifetime. Upon the death of all named beneficiaries, the fund principal becomes the property of the institution. This vehicle provides the donor with income while saving on income, estate, and capital gains taxes and relieving him or her of investment management concerns. The institution gains an irrevocable gift.
- **Charitable Remainder Trusts** are formal trust arrangements for major gifts which transfer the remainder interest of an asset's value to an institution upon the death of the named beneficiaries or at the end of a specified term of years. They provide substantial financial and tax benefits for the donor, beyond philanthropic satisfaction, and offer the institution the security of an irrevocable major gift.
- **Gifts of Life Insurance** involve the deeding of a whole life insurance policy by an insured donor to a nonprofit organization. If premiums need to be paid during the life of the donor, it is common for the donor to make gifts to the nonprofit organization which then pays the premium. One advantage of life insurance gifts is that it allows younger donors to establish a significant fund for a small initial investment.

The vehicles described above can be quite complex and their legal and financial implications must be examined with great care. The consultants recommend that training sessions be provided to acquaint arts organizations, their trustees, and their donors with the full range of options to be considered in a planned giving program. The leadership group identified in recommendation IV.1 should take the lead in encouraging more donors to consider planned giving for the arts.

In addition, careful thought should be given to the option of creating a special fund for planned gifts to smaller organizations, which could be managed by a local foundation. Such an entity, which might be called the "Portland Endowment for the Arts," would hold dedicated funds for smaller arts organizations that might not have the staff to manage endowments.

**Recommendation IV.7:**

Professional fund-raising assistance should be made widely available to arts organizations.

It is clear that arts organizations throughout the region need basic technical assistance in fund raising aimed not only at staff but at trustees and volunteers. In the past, MAC has sponsored one-day workshops which are certainly helpful as an orientation to basic fund-raising issues. Now, however, what is needed is more in-depth technical assistance including:

- On-site development audits — consisting of a short-term assessment of an organization's existing fund-raising activities with recommendations about how they can be improved and enhanced. These would be conducted by experienced development people.
- Targeted projects in direct mail, telethons, special events, etc. in which outside planning assistance would help an organization more effectively reach development goals.
- Workshops and mini-consultancies on focussed topics including capital campaign planning, deferred giving, and proposal writing.
- Meet-the-Donor sessions in which representatives of local corporations and foundations make presentations about their institution's giving policies to local arts administrators and volunteers, answer questions, and get to meet individuals from the cultural community.
- Consortium fund-raising planning — programs to assist arts organizations (especially small and medium ones) to put together joint proposals that will be more likely to be funded.



**Recommendation IV.8:**

The funding community, including small and medium-sized businesses, should cooperate to help set up and supply "arts incubators" for small and emerging groups, especially multi-cultural groups.

The Portland area has relatively few large corporations with organized giving programs and even fewer that are professionally staffed. The area is characterized by a large number of very small companies, many of which employ less than fifty people. (In the METRO area, there are approximately 35,000 such companies representing 95% of all businesses in the area.) This is a difficult environment in which to do conventional corporate fund raising since, after tapping the few large corporations, so many small companies must be solicited in order to raise an appreciable sum. For this reason, the same few large corporations get tapped over and over again not just by the arts sector but by all other nonprofit sectors as well.

There has been much discussion in the Arts Plan 2000+ Resources Task Force and elsewhere about expanding the base of corporate contributors. The argument has been made that employees are being attracted to the region based on its quality of life (of which the arts are a part) so therefore businesses of every size and type ought to be contributing their share.

It is the consultants' experience that laudable as this goal may be, conventional grant dollars will probably always come from a handful of larger corporations. Small companies tend not to get involved in formal grant-making. However, there may be some more creative ways to get smaller businesses to participate in philanthropic efforts which build on some of their unique characteristics and strengths.

For example, most arts organizations are very similar to small businesses and have similar needs. It might be appropriate for a consortium of small businesses to form a coalition to work with small and emerging arts organizations — particularly multi-cultural organizations — on institutional development. These businesses might find, renovate, develop, and/or equip an "incubator" space (perhaps an unused school, a warehouse) where several small arts organizations could be housed. Local business people could not only supply some of the labor but could also provide equipment (such as copiers and computers) and supplies. They might also share expertise in basic bookkeeping, filling out government forms and simple grant applica-

tions, contract development, and other paper-work which is often the bane of existence for newer, smaller arts organizations.

The incubator (or incubators) should not be regarded as permanent homes for arts organizations but as temporary locations and assistance (perhaps for a maximum period of five to seven years). Planning, guidelines, policies and procedures for the incubators might be established by working groups of business people and arts administrators. Larger corporations could be approached to provide some funding to match the sweat equity and in-kind contributions of those small business people who are heavily involved with the program.

There are a variety of models for arts incubators. Perhaps the most impressive is the Sammons Center for the Arts in Dallas, a magnificent brick building that is a converted water pumping station. In Dallas, it was decided that just because groups were small or new should not mean that they had to put up with inadequate space. The Sammons Center offers private offices, a common space with a secretarial pool and shared office equipment, kitchen facilities, rehearsal spaces and two small performing spaces — Kurth Recital Hall seating 120 and Meadows Hall seating 350. Among the groups that have been housed there are the Academy of Bangla Arts and Culture, New Arts Six, and the Dallas Youth Symphony.

Other examples of arts incubators include the Spartanburg Arts Center in Spartanburg, South Carolina which houses the local arts council and various other local arts groups. A converted school, its many classrooms offer ideal office space and there are numerous meeting spaces including a large cafeteria that is rented out to the community for banquets and special events.

For an incubator program to work in Portland, it will probably be important for an agency or organization to take the lead in coordinating the program and assign some professional staff to assist with logistical details. Licensing, zoning, negotiation of leases and contracts will require the investment of considerable time. Ideally, a large corporation might, as a philanthropic activity, take the lead in coordinating the program. However, the program should not be overly bureaucratic. The idea should be to get small businesses heavily involved in the time commitment since they will be less able to commit large amounts of cash.

Incubators have been successful not only as temporary homes for developing arts organizations but as central service bureaus which can cut down on

the administrative expenses which must be borne by any one individual organization. At their best, they also can provide a form of ongoing technical assistance. In Portland, such an approach would fit well not only with the profile of companies which make up such a large part of the City's business landscape but with the City's image of itself as a place where citizens participate, help out, and work together to solve problems.

Though the consultants recommend that small businesses become involved in the development of arts incubators, the need for incubators is so great that other funders such as foundations, large corporations, and the public sector will probably have to shoulder the most substantial part of the cash burden. The need for neighborhood facilities for small arts groups is discussed extensively under recommendation VIII.2 in this report and the consultants recommend that all funding sectors play a role in their development. The City should develop a policy with respect to the funding, siting, and building of such facilities and work with the private sector to assure that they are developed and adequately funded.

### *Other Initiatives*

**Recommendation IV.9:**

Opportunities should be explored to develop and sell arts-related products that speak to community pride issues, promote the arts of the area, and provide a dedicated stream of funds to support artists.

In the section on artist needs, several ideas were put forward to develop resources to support individual artist needs as opposed to the needs of organizations. The same public and private sources will be tapped in trying to garner resources for individual artists but it is well known that there are many funders — both public and private — who will not allow their funds to go to individuals.

In attempting to come up with a dedicated source of funds for artists, one idea is to develop a mechanism which will provide both commissions and royalties on the one hand and funding for fellowships on the other. Arts-related products offer an excellent mechanism for doing so.

As an example, imagine a locally manufactured chocolate *Portlandia* which could be sold as a souvenir or a novelty item at retail outlets throughout the region including the airport and various tourist destinations. If the artist were willing and an appropriate fee or royalty could be worked out, a manufacturing agreement could be developed with a candy-maker, various wholesaling and/or retailing arrangements could be worked out, and net proceeds after expenses could go into a fund to support artist fellowships and other activities. Artists would benefit in two ways — the original creator of the piece would receive financial compensation and a good deal of exposure; other artists would benefit from the revenues that flowed to the fund.

Other examples, such as post-cards, note-cards, stationery, posters, wearing apparel, mugs, plates, tote bags, umbrellas and the like could also be developed with the emphasis placed on the work of local artists. The amount of money ultimately raised through this device might be modest, especially at first, but the ancillary benefits would be considerable. In addition to the direct benefits to artists already discussed, there would be consistent and wide promotion of the image of Portland as a city which values its artists. Finally, it would continue the long-standing tradition — immortalized by the "Expose Yourself to Art" poster and the "cake box" City Hall — that Portland is a city that knows how to have fun and celebrate its arts.

**Recommendation IV.10:**

As a long-term strategy, a public/private one-time funding initiative should be planned to help stabilize the finances and operations of arts organizations.

The ongoing requirements of the cultural community in the Portland region must be met and this section has proposed ways to begin to address that challenge. But even if the necessary funds flow to the cultural community, there are still historic problems of under-capitalization that must be addressed through large, one-time influxes of money that will improve the cash positions of arts organizations.

An important precedent for this kind of funding assistance was established by the National Arts Stabilization Fund several years ago — an initiative begun by the Ford Foundation and other foundation funders which has proven successful in many cities. The method is to take a balance sheet ap-

proach to stabilizing arts organizations by encouraging a more stable relationship between assets and liabilities. As modified for the Portland region, a stabilization program would use grant funds to reduce or eliminate accumulated deficits, build up unrestricted cash reserves, and develop or increase restricted endowments. Only organizations which could demonstrate an ability to utilize funds in this way and improve their overall cash positions would be eligible. Those that continued to run operating deficits would not be eligible.

The consultants recommend a major community-wide public/private stabilization fund for the arts that would work in the following way:

1. The proposed initiative would be called "The Public/Private Stabilization Challenge." Its purpose would be to contribute to the institutional stabilization of arts organizations in the area.
2. Local governments would appropriate a certain sum of money on a one-time basis — between \$5 and \$10 million. This would be made available on a "challenge" basis to local arts organizations for deficit elimination, the building of unrestricted cash reserves (up to 25% of annual operating budgets), or restricted endowments.
3. This funding would be available to local nonprofit organizations on a matching basis, with the match coming from any source other than local government — individuals, foundations, and corporations would be the most logical sources. Earned income could be applied toward the match so long as it was dedicated to deficit elimination, cash reserves, or endowment.
4. Matching requirements would vary depending on the size of an organization's budget and the number of years it had been in existence. The largest, most established organizations would probably be required to match the dollars on a three-to-one basis (as is the case with the National Endowment for the Arts' Challenge Grant Program, among others) while the smallest, newest organizations might be required to match on a one-to-one basis.
5. No grants funds from the public sector (described in #2 above) would actually be paid until all matching pledges had been received. Organizations would have to maintain deficit free operations during the entire period that matching funds were being collected.

One of the aims of this campaign, which could last many years, is to infuse the arts community with funding to make operations less precarious.

Another is to demonstrate that the public and private sector together recognize the problem and are prepared to take steps to address it. Finally, it would offer an opportunity and a challenge to the arts community to deal forthrightly and aggressively with the problem that has plagued its effective operations for at least the last five years.

Because this program would involve a good deal of funder confidence, it is suggested that it be administered through one of the local foundations. Properly invested, the challenge funds could well produce as much as another \$1 million or more during the years the program is in existence and these funds could be added to the total available for granting or dedicated to some other purpose related to the arts. In addition, in the case of those organizations that wish to start endowments but have no track record of endowment management, the foundation could manage their funds for them either on a temporary or a permanent basis.

## Part V Arts Education

Arts education is a priority for this plan. Both school-based instruction and educational programs presented by arts organizations were identified as a priority in pre-planning and throughout the research phase. There is wide consensus on the importance of arts education to the cultural future of Portland and the surrounding counties. Arts professionals underscored this priority in responding to the Portland Arts Alliance survey conducted for Arts Plan 2000+ by Laura J. Thompson in April of 1991. They not only reported over 22,000 programs for young people already being offered but 37% reported that their educational programming for young people was increasing. The general public survey described in Part II of this report also indicated broad public acceptance of arts education and a desire to see more.

Other planning processes which have been conducted in recent months have also focussed on various forms of education as a priority for the healthy development of the City of Portland, the surrounding area, and the state. The Governor's Commission on Higher Education and Portland's Future Focus have, between them, considered goals and strategies for strengthening education at the elementary, secondary, and post-secondary levels. The place of arts education in this larger context must be clearly understood:

1. According to The College Board and other leading educational organizations, arts education develops the basic skills necessary for success in high school and college.
2. According to leading researchers at Harvard University, children acquire knowledge according to a variety of different learning styles and American schools have not been successful in adapting teaching and cur-

- riculum to many of them. The arts offer young people some unique ways to master knowledge, develop study skills, and succeed in school.
3. The arts offer children of diverse backgrounds a non-confrontational way to understand different cultural traditions, practices, and achievements; in this way the arts can promote understanding between different cultural groups.
  4. For some children, the arts offer a challenging and sustained activity which promotes discipline, hard work, and an alternative to a street life which can lead to crime, drugs, and other negative behavior. As the Future Focus Working Group on Crime makes clear, the strategy to fight crime is to combat the conditions that lead young people into it and arts programs can play an important role in this.

From another point of view, the vitality of the arts themselves, arts education is also important. The vitality of the arts community in Portland and the surrounding counties depends on audiences. But it is well documented from studies of public participation in the arts by the United States Census in partnership with the National Endowment for the Arts that individuals generally do not participate in the arts when they have had little exposure or education in the arts as young people. If arts organizations are to survive in the greater Portland area, if there are to be audiences and patrons, then there must be a mechanism to promote early understanding and appreciation in young people.

According to the Arts Plan 2000+ Task Force on Arts Education:

*Although the visual arts and music education are required by law in all Oregon elementary schools, some children in public school receive no organized, sequenced experiences and instruction...Certainly, it would be rare to find an Oregon school district in which all the arts — music, dance, theater, writing, and media arts are taught in a sequenced approach (K-12) with consideration for each discipline's unique requirements.*

The Task Force cited those factors which significantly affect the level of arts education in a district. These include:

- teacher training
- availability of artists and specialists
- school board and administrative values



- financial stability
- parental interest
- too many things competing for too little time and money in education
- absence of an adequate university of professional level preparatory courses for teachers (this factor was challenged by representatives of the Oregon Art Institute who cited both the degree-granting and continuing education programs available to art teachers at the Institute's Pacific Northwest College of Art and other institutions throughout the state).

Task Force members also cited another negative factor — the tax limitation legislation which will have a profound effect on education in Oregon and which may fall more heavily on the arts than on other areas of the school curriculum. They point out that many districts are out of compliance with state law but that more importantly, there is “an inequality of opportunity which exists for our children in a system which, being public, should be dedicated to providing a basic education to every child, no matter where he or she happens to live. In Oregon, by law, this includes the arts.” They end their *Context Statement* with a plea for meaningful arts education “for every child and every interested adult — for life.”

**Recommendation V.1:**

A regional planning and coordinating body for arts education should be formed through the Metropolitan Arts Commission for the purposes of information sharing, advocacy, planning and coordination of arts education programs, fund raising, and other initiatives in arts education.

In Portland and the counties that surround it, there was wide agreement that there are many excellent programs in arts education. But many of these programs are largely invisible, even to people who are supportive of arts education. Part of the problem is that there is no single, central information source, no body to coordinate programs, sponsor advocacy activities, put together funding initiatives, and promote communication. Task Force members agreed that there was an urgent need for a clearinghouse which could work on a regional basis. Yet there was a concern about creat-

ing a new level of bureaucracy and individuals felt that such a coordinating body could be formed within the Metropolitan Arts Commission.

There were several reasons for choosing MAC as the appropriate organization to house and coordinate this group:

- MAC is already designated as a regional arts council by the state arts agency and other recommendations in this plan suggest it will increasingly develop a region-wide focus.
- MAC is relatively neutral. It is not an educational institution, it is not an arts producing organization, nor does it represent exclusively the interests of artists. Its mandate is so broad that it cannot be seen as representing any particular constituency.
- MAC has recently taken over the artist-in-residence program for the state arts agency and will be developing staff expertise in the area of arts education.
- MAC has a proven track-record in political advocacy and fund raising.
- MAC has a stated commitment to cultural diversity and is working to develop multi-cultural initiatives. It will be important for the coordinating body to be seen as representing the interests of all citizens.

The Task Force felt that the planning and coordinating group should be separate from the Metropolitan Arts Commissioners and that there should be a formal committee (an Arts Education Working Group) overseeing the projects, planning, and policy development. The group should be culturally and geographically diverse and consist of:

- arts education professionals (teachers, administrators, school board members)
- parents and students
- business and professional leadership
- artists and arts organization representatives
- funders
- media.

It was felt that at least one member of this group should sit on the Metropolitan Arts Commission *ex officio* to provide a liaison to the official policy-setting arm of the agency.

What should be the responsibilities of this arts education planning and coordinating group (assuming there is staff support to assist them in their efforts)?

1. Convening leaders throughout the region in the arts, education, philanthropy, and government together with parents and other interested citizens to develop goals, objectives, programs, and funding strategies for arts education.
2. Supervising the development of a comprehensive database on arts education programs and opportunities including available programmatic resources for schools, teacher and administrator training programs, and advocacy initiatives. (An annual catalogue might be considered as well as a newsletter).
3. Fund raising for arts education including national fund raising for major joint initiatives which will have extensive benefits throughout the region.
4. Organizing advocacy strategies and activities which promote an understanding of the importance of the arts in education. These could be directed at school board members, government officials (both elected and staff), business leaders, parents, and others.
5. Developing innovative ways to use the City of Portland as a "cultural classroom" including incorporation of public art as part of a visual art curriculum (this was a recommendation of the Public Art Task Force). The John F. Kennedy Center's Cultural Consortium program could be used as a model for this program.

Further responsibilities might develop (if the majority of participants agreed that they were appropriate) including:

6. Brokering programs — serving as a booking clearinghouse between arts-in-education providers and schools. The Arts Partners program in Kansas City and the Arts Sampler program in Syracuse, described in Appendix C of this report, could be used as models for these programs.
7. Fostering the development of high quality, comprehensive, sequential arts-in-education curricula by bringing together curriculum specialists, arts specialists, classroom teachers, school administrators, and artists to discuss frameworks for student objectives that support arts education and

by developing proposals to districts that will aim at establishing greater commonality among frameworks for districts in the area. The Arts Partners program in Kansas City, described in Appendix C of this report, could be used as a model for this program.

8. Coordinating in-service and longer-term teacher and administrator training programs.

In reviewing an early version of this report, one arts administrator wondered whether there might be an existing organization which should take on the roles suggested in this recommendation. The consultants do not believe so. Most of the existing organizations that might qualify as arts education service organizations of this type already sell their services and this, in the consultants' view, would disqualify them as having a perceived conflict of interest. In addition, few existing organizations would have the budget, staff, and credibility of an officially sanctioned regional arts council.

**Recommendation V.2:**

Among the priorities for the regional planning and coordinating body should be a program to assist schools in implementing the state's Common Curriculum Goals for the arts.

The inequality of opportunity in arts education stems partly from the fact that though visual arts and music education are required by state law, many schools have not implemented the state's Common Curriculum Goals in these subjects. Part of the problem is lack of money, of course; but there is also a lack of understanding about how to do so and a lack of knowledge about why it is important. Some school board members and administrators fail to realize how valuable the arts are in promoting other school goals like basic skill learning, improving test scores, reducing truancy, and improving school climate and student self-esteem. In other cases, there is a lack of understanding about how to develop appropriate curriculum, teacher training, and assessment mechanisms with respect to the arts.

The new regional coordinating body for arts education should develop programs for area school districts which educate decision-makers about the importance of the arts in schools and help with the specifics of how state goals can be implemented. Task Force members felt that there are many local resource people working in schools who can constitute a team to

provide the administrative and technical assistance to teachers and administrators. The regional coordinating body should secure funds to buy the release time of these individuals along with others who can be made available to local school districts. Artists and arts administrators can be added to the team in order to educate school district personnel about how outside resources can be utilized in developing a comprehensive arts program.

One idea might be to have a loan program in which a teacher, artist, or multi-cultural specialist with expertise in the arts would be made available to a school system for up to two weeks. Alternatively, teachers and administrators from a targeted school district could be invited to come to a site with a strong arts program to observe and develop ideas. Eventually evening and summer programs could also be added.

**Recommendation V.3:**

Arts education advocacy activities should incorporate parents and should include public proclamation events as well as strategies that expand the use of artists, arts organizations, and multi-cultural presentations for school-age children.

One of the most striking findings in the survey of the general public in Multnomah, Washington, and Clackamas Counties was the strong support for providing more arts in the school curriculum:

- 86% felt it was important to provide more classroom education (with 50% saying this was *very* important)
- 93% said more field trips to arts events were important (with 71% saying this was *very* important)
- 91% said providing tickets to arts events was important (with 66% saying this was *very* important)
- 87% said providing more extracurricular participatory activities was important (with 54% saying this was *very* important).
- 88% said that providing artists to work with children for special in-school experiences was important (with 60% saying this was *very* important).

What is remarkable about these figures is that even those who themselves are not active participants in the arts still responded over 80% positively on each of these questions. *Clearly, there is strong support for the idea of children receiving more arts education.*

These figures demonstrate that parents may be one of the strongest constituent groups in support of more arts education and they should not only be the target of advocacy efforts but should be brought into the advocacy network to influence school board members, elected officials, funders, and other leaders. One need only to look at the statistic among *attenders* of arts events to see how important the connection is between their children and the arts. Fully 44% of those attenders surveyed attend arts events with children, an extremely high ratio when one considers the large number of single people and elderly who attend arts events on a regular basis. In thinking about specific kinds of advocacy projects, the Task Force discussed several ideas:

- advocacy projects that assure that all school arts programs include the work and performances of professional artists as well as community arts resources (such as museums, performing arts organizations, and multi-cultural presentations)
- a "Public Proclamation Project" which not only supports arts education in a general way but which enables individual districts to announce progress in reaching educational goals for the arts
- a program to establish arts as a high school graduation requirement, a middle school requirement (without embedding it in foreign language), and as an entrance requirement to Oregon colleges and universities.

**Recommendation V.4:**

Specific programs should be developed to improve pre-service and in-service training for teachers including stricter certification and recertification requirements for teachers and administrators.

Over 90% of Task Force members felt that the present arts-related certification requirements for teachers and administrators are inadequate and that more arts education course work ought to be required for certification (fully two thirds of the Task Force listed this as an "urgent" need). MAC's

Arts Education Working Group, discussed under recommendation V.1, should set desired criteria and guidelines and then should work with the Teachers Standards and Practices Commission in changing the existing requirements.

Because the majority of teachers in the region receive their pre-service and in-service training in the Portland area, it was felt that more could be done to improve the quality and availability of programs in arts education. Baccalaureate and graduate degrees and professional certification programs in education in all the arts need to be available at more local colleges and universities. Where they do exist, they need to be strengthened through additional financial support. Discussions with senior members of the administrations of these institutions would be appropriate as would coordination with arts administrators of use of arts facilities and organizations of the City as part of the "classroom" for teacher and administrator training programs.

In addition, more might be done by developing local sites for nationally recognized teacher and administrator training programs in arts education — there has already been considerable success with the Getty's national program in art education and many teachers have benefitted from training that has followed its "discipline-based art education" approach. Alternatively, there are many programs nationally to which teachers and administrators could be sent. Among institutions offering national replication programs or centralized teacher and administrator training opportunities are Lincoln Center Institute, the Metropolitan Opera Guild, The Kennedy Center, Harvard University (summer institute in assessment in the arts and humanities), and many others.

**Recommendation V.5:**

Non-school-based education programs should be fostered, encouraged, and funded — including those based in neighborhoods and those which are aimed at preserving and presenting the work of other cultures.

The Task Force was clear that arts education needs to reach beyond schools for several reasons:

- Arts education opportunities need to be available to all citizens, not just school-age students.
- Many community-based organizations and arts organizations offer a rich variety of arts education programs that go well beyond what schools can offer; so do City agencies (including Portland's Parks Department).
- Arts education programs in non-school sites can strengthen neighborhood organizations and can foster cultural identity through specific activities which explore the arts of different racial and ethnic groups.
- High level training programs for gifted students are generally not available through public school programs (with the exception of some magnet schools).

A variety of these programs can have a major impact in fostering goals which go well beyond arts education:

- They can provide recreational activities to school-age students who might otherwise become involved in unsuitable and illegal activities.
- They can preserve and promote cultural traditions of minority and ethnic groups.
- They can enrich the lives of special populations like seniors and the disabled.
- They can promote audience development for arts institutions among those who have never participated in the past.
- They can offer appropriate activities for students with special gifts in the arts (including mentorships, apprenticeships, scholarships, exhibits, performances, competitions).

In the review of an early draft of this report, there was a desire to see additional emphasis placed on arts education beyond grades K-12 with the goal of insuring a sequential multi-faceted approach to life-long learning in harmony with the state's Common Curriculum Goals for the arts. Community arts organizations could be recognized and supported since they already play a significant role in life-long learning opportunities in the arts. Given the strong emphasis placed on the community value of citizen participation and broad inclusion in community initiatives, this seems a reasonable and sensible emphasis.



It is recommended that MAC develop a special funding category for all types of exemplary programs in arts education in the three-county area that foster such broad community goals. Criteria and funding procedures should be worked out with the advice and assistance of the Arts Education Working Group working with MAC as described under recommendation V.1.

**Recommendation V.6:**

MAC's Arts Education Working Group should begin to explore the possibility of creating more professional-level training opportunities in the arts for young people in the Portland area.

Several Task Force members and other interviewees for this project stated that Portland is at a competitive disadvantage culturally because it lacks professional level training, particularly in the performing arts. This hurts the community in several ways:

- Young performers of talent from the area cannot stay if they want to receive professional level training. Visual artists find little scholarship assistance for the programs that do exist at such institutions as the Oregon School of Arts and Crafts, the Art Institute's Pacific Northwest College of Art, Portland State University, Lewis and Clark College, and Marylhurst.
- Young performers of talent from outside the area — the kinds of individuals who contribute to the depth and breadth of the cultural community — are not attracted to Portland and visual artists are attracted to other communities where more extensive support is available.
- Because there are few institutions that provide high level training in the arts, there are few ways that gifted artists and performers can supplement their incomes. This hurts Portland's competitive position in attracting these individuals. For example, the Symphony suffers from the fact that its players cannot expect to supplement their income by teaching in a conservatory. In addition, salary levels for teachers at those institutions that do provide arts training are generally low.

On the public school front, the problem is complicated. While there is an arts magnet high school in Portland, its primary goals concern desegregation, not arts training. As a result, the location of the school, the expectations of the School Board and other school officials, and the desires of the local community all work against attracting students whose primary interest is high level arts training. While the training that is available appears to be of high quality, most especially in dance, there is no real commitment to doing what is necessary to build a well functioning arts high school.

The Task Force was divided about the urgency of these problems but others in the arts community believe they must be explored and resolved. A number of follow-up studies will grow out of Arts Plan 2000+. One should be a feasibility study for more pre-professional training institutions including a public performing arts high school as well as post-secondary, pre-professional world class training programs in the visual, performing, and graphic arts.

## Part VI Public Involvement

During the early stages of Arts Plan 2000+, the Steering Committee identified two issues related to public involvement in the arts. One was the issue of wider access to the arts — the Committee wanted to know how the arts might engage the lives of all people in the region and how various art forms might be made more available and accessible. The second issue was marketing — the Committee wanted to learn how the arts could be marketed so as to increase both local and non-local audience development as well as earned income of arts organizations.

A Task Force on Public Involvement/Access was convened to consider these issues. Along with The Wolf Organization's survey of the general public (described in Part II of this report), its report provided much of the background for the specific recommendations in this part of the report. The consultants believe that further work needs to be done in working out the details, logistics and organizational responsibility for the recommendations and that a sub-committee should be established as soon as possible by Arts Plan 2000+ to get this work completed by the end of 1991 (a suggested format for this is described under recommendation X.2). The sub-committee should consist of representatives from MAC, the media, the local transportation industry, the Portland Oregon Visitors Association (POVA), arts organizations, and local arts councils throughout the region. If appropriate, an offshoot of this group might be developed into a standing committee of the Regional Arts Council that is recommended in Part III of this report.

## Information and Promotion

### **Recommendation VI.1:**

A variety of region-wide information and promotion strategies should be developed to encourage greater public participation in the arts. These might include multi-language brochures, an arts periodical, an events database, coordinated market research, a mailing list development program, and better utilization of the media.

According to the report of the Public Involvement/Access Task Force, "lack of involvement with the arts is often the result of lack of information about the arts." The Task Force report goes on to say that "publicity for arts events, both by organizations themselves and by the media, often appeals only to existing audiences." The Wolf Organization survey of the general population backs up this view. Forty-one percent of those surveyed said that inadequate information about events was one of the factors that kept them from attending more events; fully 56% of non-attenders cited lack of information as a key factor.

Overall, there seemed to be only one primary source of information about the arts — *The Oregonian* — according to 64% of the respondents. Of particular concern was the ineffectiveness of the promotional materials of the arts groups themselves. Only 5% of the respondents said that direct mail from arts groups was a primary source of arts information for them and not one of the 345 respondents mentioned the Portland Center for the Performing Arts *Calendar* in this connection.

A better system of information collection, dissemination, and promotion of arts groups and activities is required. Since few arts organizations in the Portland area have large marketing budgets and none has the necessary resources to saturate the region with information, cooperation and collaboration is highly desirable. Specific suggestions for collaborative initiatives follow:

- A cultural map which shows locations of arts facilities in the region, convenient public transit, parking options, and phone numbers of arts facilities, organizations, and galleries. The map would be distributed free of charge. The cost of printing would be

borne either in full or in large part by advertising and sponsorship (commercial enterprises like restaurants would pay for listings).

- **Multi-language brochures** designed to highlight cultural activities, events, and organizations in the entire region. One of the brochures should serve as a kind of master-listing; however, there should also be other brochures, with maps included, developed around themes — galleries, crafts, music, theatre, dance, historic sites, gardens of the Portland region. Partial funding might come from various chambers of commerce, POVA, MAC, and arts groups. The brochures should be used locally and also be distributed widely as part of tourist and convention promotion. By producing some brochures with text in Spanish and Japanese, more local residents as well as many more visitors will be able to use these brochures.

An interesting approach to this kind of promotion was tried quite successfully in Massachusetts some years ago. The series was called "Our Common Wealth" — a wordplay on the fact that Massachusetts officially regards itself as a "Commonwealth." Each set was developed around a cultural theme (in much the same manner as what is being proposed for the Portland area). The target audience was seen as a mix of local residents (who were unfamiliar with the cultural treasures in Massachusetts) and visitors. The visual design and photography was done by local artists and was of such high quality that the posters were regularly hung as art pieces in offices and homes. The project was funded partially by the state arts agency, the State Office of Tourism, and Polaroid Company (which also provided high quality photography).

- **Computerized events database**, designed to get more comprehensive calendar information about the arts to:
  - the local media
  - telephone and closed circuit television information services
  - neighborhood and social service organizations
  - individuals who want to know more about events that are available
  - cultural groups themselves that need a calendar clearinghouse
  - tourist industry representatives.

In order for this service to help increase *local* participation and access to the arts, it should include neighborhood events, fairs, church-related performances, culturally-diverse events like pow-wows, and events that are not strictly speaking "arts" events (such as events at the zoo). Such a database could eventually provide the basis for a *regional* calendar publication. As part of delivering this service, it would be important to set up proper systems to gather and store the information. A simple computerized database should be created which would store important information about arts and humanities events, including:

- description of the event
- name and address of sponsoring organization
- dates, times, and locations
- admission (listing of ticket prices and availability or whether the event is free).

Since *The Oregonian* is the single most important source of information about the arts at the present time, the Task Force suggested that the newspaper might serve as an organizational partner (or partial funder) of the database project. Other partners might include POVA and MAC. An interesting example of this kind of database exists at the Greater Columbus Arts Council in Ohio and should be studied as a model.

- A regional periodical, which would disseminate information about activities to the public on a regularly updated basis. This publication would include generalized listings of performing arts presentations, exhibitions, gallery openings, free and neighborhood events, lectures, films, and other activities. It would also include maps featuring the location of key facilities and other points of interest. In addition, the publication might include:
  - interviews and articles about attractions and cultural practitioners including an emphasis on the diverse cultural traditions that exist in the region
  - discussions and critical reviews of recent exhibitions and performances
  - advertisements from local businesses and supporters.

The publication should be distributed widely and should be free. Ideally, it could be distributed through local print media as an insert. Alternatively, it might be widely available at selected locations in the region without charge while also being available by mail for a modest subscription fee. The consultants believe that this publication should be produced through a partnership between the public and private sectors.

It should be pointed out that experience with such a publication in other locations suggests that it is difficult, given the lead time necessary for copy, to depend on this publication for a comprehensive calendar of events. Such a calendar will grow out of the events database which should be widely distributed to the media for the latest calendar updates. However, as a general guide to events and places, the regional publication can be quite useful.

- A joint mailing list development program which is designed to provide arts organizations with new names and addresses of interested people. One strategy would be to set up tables or kiosks at community events in the region to offer brochures about arts organizations. Each person taking information would be asked to fill out a card with his or her name and address to receive more information for whatever specific organizations he or she listed on the card. The card could be left in a box at the event or it could be mailed in later. Another more ambitious approach might be to purchase mailing lists from list vendors or commercial enterprises and carry out some "acquisition" mailings, using a coupon booklet of free admissions or special offers as an inducement. The purpose would be to identify new prospects for the various organizations.
- A program of coordinated market research, designed to develop and use standardized protocols for surveys to gather statistical information about how to market to targeted audiences. By designing surveys jointly, arts groups would save on their cost and would also guarantee that the findings were compatible from one organization to another. They could also consider implementing the surveys jointly, which might cut costs. A project of this type is currently underway in Kansas City where five arts groups, with financial assistance from the Greater Kansas City Community Foundation, are attempting to expand their audiences. Surveys,

direct mail tests, and special media promotion are all part of the research effort.

As a related issue, it is clear that virtually every arts organization in the region could benefit from services and assistance in marketing and promotion. Technical assistance, both on a group basis and for individual organizations, is sorely needed. This need can and should be addressed through the comprehensive technical assistance program which was discussed under recommendation III.2 earlier in the report.

Finally, there is little question that a key factor in improving information and promotion of the arts in the Portland area is the media itself. Currently, arts coverage in the region is spotty at best and the amount of space devoted to cultural activities by *The Oregonian*, people's main source of information about the arts, is minimal. Changing long-held policies about arts coverage will not be easy and will take strong and outspoken leadership from a broad segment of the community, not just professionals in the arts field. Indeed, this issue should be part of the agenda of the leadership group discussed under recommendation IV.1.

### *Making the Arts More Accessible*

"Public involvement," according to the Task Force, "is the extent to which persons of all ages, income strata, ethnic and educational backgrounds and physical abilities are observers, participants or contributors to some form of artistic/cultural expression as a regular, natural, and integral part of their lives and lifestyles." Public involvement appears to be limited by a variety of factors. One is the architectural barriers of facilities which are not accessible to people with disabilities. The Task Force is clear that Portland facilities must comply with recent federal legislation and that a Task Force should be established to monitor such compliance and make recommendations for improvements. Such a Task Force should include representatives of local organizations of disabled people.

Two other factors which limit public involvement are logistical (transportation, location of facilities, safety and parking issues) and financial (the cost of participation) and the Task Force had many specific recommendations in these areas.



Free Events/Alternative Spaces

**Recommendation VI.2:**

More public and private funding should go toward events for the general public that are less costly and are held in alternative locations and spaces throughout the region.

The Wolf Organization survey indicated that the single most important barrier to attendance is high ticket prices. Fully three out of four respondents cited this as the reason they did not attend more. It is usual, in surveys of this kind, for ticket price to be cited as a factor to mask what is lack of interest on the part of some respondents. However, more than half of the respondents claimed to have attended free outdoor events such as Waterfront Classics or concerts in neighborhood parks in the last year (64% of Portlanders and 52% of regional residents) — by far the highest reported attendance for any event or organization listed. That combined with the high interest indicated for arts festival-type events (44% among Portland residents, 54% among regional residents) indicates that many individuals would probably attend more if the events were free.

In many cities, public funds are used partially to subsidize free or low-cost events — outdoor pops concerts, free admission days at museums, touring events for children in schools or neighborhood facilities, and so on. The City of Charlotte and surrounding Mecklenberg County regularly provide funds for these purposes, with the City concentrating on events for the general public and the County focussing on children's programming. In other cases, the private sector picks up some or all of the cost of such events through sponsorships.

It is recommended that the Tri-County region make a major commitment to such programming by taking the following steps:

- All local arts councils (including the new Regional Arts Council) should commit some of their tax-based funding toward subsidy of events that either are free to all or have some free admission available, using either the mechanism of grants or a "contract for services" approach.

- Corporate funders should make a commitment to match the public funds either by subsidizing such events directly or contributing to a “free events” fund administered by the Regional Arts Council.
- Local arts councils should develop criteria for adjudicating between applicants for “free or low cost events” funds including:
  - public impact (numbers of people likely to benefit)
  - priority locations (arts events presented in locations not generally well served by cultural groups)
  - culturally diverse programming (some of the programs should be reflective of the cultures of non-White populations that make up a large part of Portland and the region)
  - artistic quality
  - mechanism by which free tickets will be distributed and tickets will be sold if not all admissions are free
  - organizational capability.

In reviewing an early draft of this report, members of the Steering Committee were concerned that free or low cost events can devalue the arts and they felt that great care must be taken to demonstrate the public service nature of such programs. Several individuals expressed a preference for those events in which a certain number of tickets would be distributed free but with some admission charged after the free tickets had been distributed. The consultants believe that in many cases the logistics of collecting admission fees for large public events is cumbersome and can defeat their purpose. They believe that all of these considerations must be carefully balanced in determining whether admission should be charged.

As we have seen, cost is one important factor to be addressed in promoting wider participation in the arts. Another is the reluctance on the part of many in the area to come to downtown Portland — fighting traffic, worrying about parking and safety issues, and, in the case of regional residents, spending a good deal of time travelling to and from the events. According to The Wolf Organization survey, 64% of residents cited inconvenience and the high cost of parking as a factor limiting attendance; 42% of regional residents cited the time in getting to and from Portland as a factor (with 39% complaining about the inconvenience of starting times); and over half of all

respondents agreed that “more cultural activities should take place in neighborhoods rather than in downtown Portland.”

The Task Force on Public Involvement/Access proposes that “arts organizations’ outreach efforts bring their art to regional facilities outside of the downtown core.” They also propose that MAC and various arts organizations and artists “work with neighborhood associations, churches, social service agencies to develop new and non-traditional audiences.” Funding should be provided to take the arts into a variety of alternative spaces throughout the neighborhoods and the region. Especially when combined with more free events, the consultants believe this could be an important strategy for increasing public participation in the arts.

### Transportation and Safety

**Recommendation VI.3:**

Efforts should be made to enhance the perceptions of convenience and safety in connection with getting to and from Portland-based events.

Despite the impression of outsiders that Portland is a “safe” city, many in the region apparently do not think so. Approximately a third of the respondents to the survey cited concern for safety as a reason for not attending more arts events. The Task Force made several suggestions about how this problem might be addressed:

- explore ways of expanding mass transit options for attendance at arts events and facilities, including schedules and routes
- explore the development of a system of pick-up and drop-off at Senior Citizen and Neighborhood Community Centers
- establish transportation/ticket packages which include vouchers for public transit, private carriers, or parking which would be included with the tickets to events
- hire guides to escort people to their cars after evening arts events
- consider earlier starting times and more day-time weekend events to encourage greater attendance by seniors (these might be combined with free events that were recommended earlier).

A number of these initiatives will require cross-industry cooperation and it is suggested that the recommended Sub-committee on Public Involvement explore ways in which strong collaborative working relationships can be established which will be of benefit to all those participating.

### Regional Marketing and Joint Promotions

**Recommendation VI.4:**

Arts organizations in Portland should develop a regional marketing strategy which includes joint promotions and packages.

Under recommendation III.3, the consultants discussed the importance of Portland-based organizations developing programs which could be taken to other communities in the region. Not only would this be a benefit to many areas which have not developed a professional arts infrastructure, but it would also increase the earned income of the arts groups.

Portland arts organizations should also develop more extensive marketing strategies to attract regional residents to Portland. Some of these strategies can be carried out individually by organizations wishing to build up their lists of subscribers, members, and/or single ticket buyers. For example, an organization might wish to target particular communities for audience development campaigns, free promotions, advertising, and heavy direct mail or telemarketing efforts.

Another technique which is a bit more ambitious but generally thought to be an excellent strategy for building regional audiences is for arts organizations to establish local committees, chapters, or "Friends of" groups in various towns. These "Friends" groups, once they are set up, generally do their own membership recruitment and their members become ticket buyers and, often, contributors. The members not only enjoy the benefits of coordinated transportation, but the arts organizations also may provide special services such as discounted tickets, a gallery talk by a noted curator, a newsletter, or post-performance refreshments. The local "Friends" group may itself offer events and activities and become a kind of social organization. Another benefit to the arts organizations is that individual members of the "Friends" group may help out with local fund raising.

While such efforts on the part of individual organizations are certainly appropriate, Portland arts organizations should also explore ways in which they can work together for their mutual benefit in getting regional residents to come into Portland for arts events. Of particular interest might be a "sampler" series in which several arts organizations participate. Regional residents would have the benefit of attending events put on by several organizations and might still gain the benefits of organized transportation, pre-event dining arrangements, and special discounted rates.

In Kansas City, Missouri, this idea of a "sampler" series has been taken one step further by arts organizations. The four major downtown performing arts organizations — the Kansas City Symphony, the Lyric Opera, the Missouri Repertory Theatre, and the State Ballet of Missouri — have cooperated on a "sampler" series which is held not in Kansas City, Missouri but at the new auditorium at Johnson County Community College in Kansas. The series is intended not only to expose many regional residents to these performing organizations for the first time but to entice some of them to become more frequent attenders in Kansas City. A joint database of attenders is being developed so that the organizations can do follow-up marketing when they go into their individual subscription and single ticket campaigns.

Joint promotions need not be limited to performing arts organizations. Indeed, Portland's "First Thursday" offers an excellent model for the success of joint promotions by visual arts organizations. The emphasis of these efforts in the future should expand beyond Portland. Like Kansas City, Portland's metropolitan population base is relatively small (both are under 500,000). If Portland arts organizations are going to continue to develop their product downtown, they will have to target a larger geographic area in their audience development efforts. Regional marketing — both individually and cooperatively — is one important way to do so.

### *Cultural Tourism*

In many ways, Portland is an ideal location for cultural tourism. It is a popular destination city for business and pleasure travelers, it is located in a region that does not offer an extensive and competing professional arts menu, there is little competition from the sports industry (tickets for Portland's professional basketball team are for the most part unavailable), its hotels enjoy a high occupancy rate, the downtown is relatively safe by American standards, and many of the arts venues are conveniently located.

But to date, marketing to tourists has not been an extensive part of the audience development strategy of arts groups nor has it been a high priority for the Portland Oregon Visitors Association (POVA). In fairness, both the arts community and POVA have experimented and collaborated on some pilot efforts including a project undertaken in conjunction with Horizon Airlines. Staff from POVA, MAC, and PCPA attempted to put together weekend packages to Portland from various northwest cities. The concept was based on a successful program that was developed in Ashland, Oregon with the Shakespeare Festival. In Portland's program, 25,000 brochures were sent out to Horizon's frequent flyers but the return was disappointing.

There were several reasons why the effort was not more successful:

1. There was no central ticketing service in Portland that could handle orders. Those who were interested had to call each arts organization for tickets.
2. Arts groups (and in some cases, hotels) were reluctant to discount deeply. Thus, the package for travellers was not attractive financially.
3. There was no agency willing to assume the ongoing clerical and supervisory functions to make this program a success.
4. Guaranteed blocks of tickets were difficult to come by. Many Portland arts organizations enjoy relatively full houses and were unwilling or unable to provide assurances so far ahead of time that large numbers of tickets would be available.

Despite the disappointing results, cultural tourism should be a high priority for further planning and development for several reasons:

- To the extent that cultural attractions in Portland and the region can lure visitors or encourage them to stay in the area longer, the local economy will benefit.
- Portland's and the region's population base for arts and entertainment events is small. If the cultural community is to grow, audiences and financial resources need to be augmented by people from outside the area.
- Successful cultural tourism will strengthen the fragile alliance between the cultural industry and the travel industry in Portland and the region.

**Recommendation VI.5:**

A Working Group on Cultural Tourism should be formed through the Portland Oregon Visitors Association (POVA) and should sponsor an ongoing education and technical assistance program.

The first step in developing a strong cultural tourism program is to organize a broad working group consisting of travel industry representatives (including hoteliers, restaurant owners and travel agents), POVA staff, representatives from the arts industry (gallery owners, arts organization staff, artists), and others who would benefit directly from such a program. Ideally this group should be housed at POVA and some funds should be made available — perhaps from the transient occupancy tax — to provide part-time staffing and programming (cf. recommendation IV.3, option #2 where an annual initial amount of \$100,000 is mentioned).

The POVA Working Group on Cultural Tourism would be responsible for organizing a program of activities based on successes in other communities such as San Antonio, Texas and Fort Lauderdale/Broward County, Florida (cf. Appendix C, pages C.18 - C.20). These might include:

- Annual workshops on arts and tourism featuring nationally-known experts. These workshops would stimulate ideas, discussion, and formal planning of projects.
- Cooperative promotion/sales efforts such as:
  - cultural representatives (and even performers) accompanying tourism promotion representatives to conferences and trade shows
  - the development of showcases and carefully planned cultural “stops” on promotional tours of Portland
  - cultural spokespersons meeting with travel writers to discuss arts opportunities in Portland and the region.
- A technical assistance program to encourage pilot collaborations between the two industries. In Broward County, for example, thirty arts organizations and thirty hotel managers have been “matched” to develop joint programming and marketing efforts.
- Multi-language tour guides and brochures about arts activities in Portland and the region (as described under recommendation VI.1).

As in San Antonio, these might include a bi-monthly calendar of events which is sent to all hotels, tour operators, libraries, convention and visitor booths.

- Travelling orientation programs, slide shows, and free passes for hotel staff (front desk, concierge, valet parking, and marketing) and others in travel-related trades (taxi drivers, waiters) on local and regional cultural resources.

This Working Group should not be confused with the Sub-committee on Public Involvement which is recommended in the introduction to this part of the report. That committee's charge, as presented by Arts Plan 2000+, focusses on developing local public participation in the arts. It is intended to work only until the end of 1991 and, if it does become a permanent committee, it will work under the auspices of the Regional Arts Council recommended in Part III of this report. The Working Group on Cultural Tourism, by way of contrast, will work out of POVA and its primary charge will be to develop ideas to promote participation from visitors who are not residents of Portland or the immediate area. Clearly, however, there should be close cooperation by the two groups since many projects may be jointly initiated and implemented.

**Recommendation VI.6:**

The proposed POVA Working Group should undertake a long-range plan to develop an ongoing structure for cultural tourism including ideas for tour packaging, information dissemination, and centralized ticketing.

The second stage in the evolution of cultural tourism will necessitate more formal development of a cultural tourism infrastructure and plan. In much the same way Arts Plan 2000+ has proposed an overall administrative, program, and funding plan for the arts, POVA's working group should develop a comprehensive set of goals, strategies and mechanisms for cultural tourism. Such a plan should:

- explore mechanisms to make tour packaging profitable
- propose a more effective centralized ticketing system



- develop a means to fund and carry out ongoing market research to determine what types of packages and promotional strategies will produce results
- explore the feasibility of cross-promotion within the cultural sector (performances and gallery hopping) or between the cultural sector and other sectors (e.g., a cultural-botanical visit to the Portland area for horticultural enthusiasts in the spring)
- determine the resources required for a central cultural tourism service and decide where it should be housed.

With respect to research, a series of questions should be explored concerning how the needs of the travel industry can be better served by arts groups. If the highest vacancy rates in Portland hotels are on week-ends, for example, what can cultural groups do to maximize ticket availability at this time of the week? Should curtain times be set in such a way that restaurants get an extra seating? Can the Oregon market be developed and promoted so that Portland becomes a regular week-end destination for more people from within state?

Regarding funding and administration, the plan should establish whether organizational participants in the cultural tourism program should bear a substantial cost of organizational and promotional services. Should POVA itself maintain staff and hot lines? Should it be the lead agency to coordinate bids for tour packages? Should it put together tours itself? If the answers to any of these questions are "yes," how will regional concerns be addressed? What about sites, events, and constituents located outside of Portland? Will they feel that their needs are being properly addressed?

All of this will require planning on a large scale and once again POVA is the logical agency to oversee the planning effort. Outside funding should be sought from both the public and private sector in much the way that it was for Arts Plan 2000+. In addition, cultural groups, hoteliers, and others who might benefit from such a plan might contribute something to the effort.

Finally, in setting up the planning process, careful consideration should be given to how broadly cultural tourism will be defined and what groups will be considered part of the organizational constituency for the plan. The more sectors that are involved (e.g., historic sites, the zoo, garden clubs, science centers) the greater likelihood that funds can be secured and the recommendations implemented.

**Recommendation VI.7:**

Long-range planning for cultural tourism should explore the feasibility of an arts festival along the lines of Spoleto, USA.

One of the questions which should be explored as part of cultural tourism planning is whether a major international arts festival might be developed based on the model of Spoleto, USA. Spoleto, USA, founded by composer Gian Carlo Menotti and based on a similar festival in Italy, is a two-week event in Charleston, South Carolina. Its success is based largely on an elected leadership, especially its long-time Mayor, who understood the value of the arts to tourism and was willing to devote public resources to the project. The Spoleto Festival not only showcases art; it showcases Charleston. And one of its greatest values to the City is that it introduces tourists to Charleston who then return to enjoy its many other amenities at times other than when the festival is in session.

The Portland area has already experimented with several festivals. The City itself has ARTQUAKE, a three-day multi-arts festival at the end of the summer; the region offers a jazz festival in Gresham; and Chamber Music Northwest's concerts in late June/early July can also be categorized as a festival in a single arts discipline. But because these initiatives are independent and uncoordinated and because they are relatively small in scope, they do not have nearly the impact of a Spoleto. Compare Spoleto's economic impact on the City of Charleston (estimated at over \$54 million, as reported in the June 18, 1991 issue of the "Chronicle of Philanthropy") with ARTQUAKE's self-reported \$1 million economic impact on Portland's economy and the differences are immediately apparent.

It is not the intent of this report to evaluate the effectiveness of ARTQUAKE or any other festival-like activity in the Portland area. What is clear is that there is plenty of room for a major international arts festival in Portland. The Spoleto, USA model is particularly interesting since it manages to turn the entire City of Charleston, South Carolina into a performance and visual arts space for two weeks. It attracts tens of thousands of out-of-state visitors and its contribution to the local economy extends throughout the year when many Spoleto Festival attendees come back to Charleston for return visits. Spoleto attracts people partly by its performances (which include leading performers from around the world), partly by its

public art (this year over \$600,000 of site specific temporary art was commissioned, mostly with funds raised from out of state), and partly by the overall charm and beauty of the City. In addition to the big names associated with the main events, there are literally hundreds of other events, art exhibitions, fairs, and tours associated with "Piccolo Spoleto," from which local performers and artists benefit handsomely.

Any one who has spent time at the Spoleto Festival would be struck by how well Portland might serve equally well as a possible festival city. Whereas Charleston's attraction is its history and magnificent old houses and pre-Civil War buildings, Portland's is its natural beauty, its gardens, and its connection to the out-of-doors. Like Charleston, Portland has a river which could become a part of the festival landscape, it is reasonably small in scale, attractive and inviting, a City with a tradition of public art and culture, a place that people enjoy visiting. It has good cultural facilities located in the downtown, an extensive infrastructure of artists and performers, a downtown museum, many galleries, and places to shop. Further, Portland has a magnificent surrounding region which could enhance the festival and become an enticement for people to extend their visits. Finally, the Portland region is home to many cultures and the multi-cultural nature of the festival and its links to the Pacific Rim could be an added benefit.

The Portland area might be a candidate to become a west coast version of Spoleto but it would take leadership, planning, imagination, and the enthusiastic involvement not only of the cultural sector but also of those in the travel industry and public and private leadership. Long-range planning efforts by the Working Group on Cultural Tourism should explore this possibility carefully. Certainly those already in the festival business — representatives from ARTQUAKE, from the jazz festival in Gresham, and from Chamber Music Northwest — should be invited to participate in the discussions. The Working Group might also evaluate the concept in relation to another initiative that surfaced during the interviews for this project — the idea of Portland becoming a Worlds Fair site. The consultants believe that an arts festival may be more appropriate since, as a permanent event, it would continue to cultivate the special qualities that make the City and the region unique and special.

## Part VII Cultural Diversity

Statistics from the 1990 census indicate that people of color represent a significant portion of Portland and the Tri-County region and, according to most projections, the multi-cultural population is likely to increase during the period covered by this cultural plan. In the Tri-County region, about 11.3 percent of the total population is non-white; in Portland, the figure is over 17 percent. These figures certainly justify a concern that the needs of culturally diverse populations for access to arts and cultural resources must be met.

However, there are two other reasons why it is important to focus on cultural diversity in this plan:

- First, there has been an historical bias in the definition of the arts in the United States toward those styles and traditions which are primarily European. As a consequence, the richness of the arts and the opportunities for expression have been severely restricted.
- Second, the enhanced economic importance of the Pacific Rim will result in an increase in the diverse cultural influences in the region. It will be a significant positive step for the arts community to assure that arts programs reflect the widest possible range of cultural expression and involve all segments of the community.

It has been the consultants' intent to discuss issues of cultural diversity throughout this report, rather than relegate them to just one section. Cultural diversity is a cross-cutting issue that affects all aspects of this cultural plan. As the Cultural Diversity Task Force stated, "The issues encompassed here extend far beyond the scope of any one body or task force. But there

is a strong belief in the tremendous potential of all task force [areas] combined." As a consequence, this section will refer to many recommendations already in the report, highlighting them from a multi-cultural perspective.

**Recommendation VII.1:**

The new Regional Arts Council should draft and disseminate a summary statement which defines cultural diversity and affirms its importance to the arts of the region.

One of the central concerns of the Steering Committee of Arts Plan 2000+ has been assuring that the multi-cultural nature of the arts in the Portland area is properly addressed by this planning process. Much discussion and many meetings have focused on this matter. However, the consultants' telephone survey of the general public suggests that this concern is not shared by the general public. According to the survey, only one out of seven individuals agreed or strongly agreed that "There is little diversity of cultural expression in arts programs in Portland" which suggests that they may not be aware of what is missing from the range of culturally diverse programming. The consultants see this as cause for concern and believe there must be an effective educational program to alert the public to the need to celebrate cultural diversity through active outreach and programming.

While public statements on the importance of cultural diversity will not themselves change the situation, they are necessary because they form the basis of a common language of inclusion that will have a long-term impact on the formation of public cultural policy in such areas as allocation of funds, assessment of the need for facilities and programming initiatives, and other substantive efforts.

A statement should be drafted, with input from the Cultural Diversity Task Force and others, and adopted by the board of the Regional Arts Council. The consultants suggest that the following language, adapted from working documents of the Cultural Diversity Task Force, might serve as a starting point for such a statement:

*"Cultural diversity is a reflection not only of our country's multi-ethnic origins but a celebration of the cultural richness of contemporary society.*

*Cultural groups within our community and nation embody different languages, lifestyles, philosophies, customs, diets, literature, and art works.*

*"Art is a vital link between specific racial and cultural groups and the general population. Art provides the means for individuals to access not only their own culture, but to gain a greater understanding of global cultures. Art as identity, without bias or exclusion, is an effective vehicle to document, beautify, and raise consciousness for all segments of the population.*

*"Cultural diversity provides the context within which origins and art forms meet, mix, mesh, but do not melt."*

**Recommendation VII.2:**

Information about a broad range of arts activities should be disseminated to the multi-cultural community. Efforts should also be made to inform the larger community about the range of multi-cultural activities in the region.

According to the Cultural Diversity Task Force, "a major factor working against participation by minority and culturally diverse communities is a lack of awareness of arts activities and resources." Problems with communication have also been identified by the Public Involvement/Access Task Force, and recommendations have been made in the section of this report which address this issue (cf. recommendation VI.1).

Of particular value to culturally diverse communities is the computerized events database described in the discussion of recommendation VI.1. The information from this database will be made available through, among other means, a regional publication. The focus of the database is on *local* cultural events, using the broadest possible definition of "culture." Such a device must, therefore, be aimed at a local, resident audience and not exclusively a tourist population. It must be inclusive and provide listings for performances of church groups, neighborhood youth programs, schools, and other local cultural activities. It will increase access to multi-cultural activities in several important ways:

- It will provide ways for individuals in ethnic and minority communities to learn about what is being offered throughout the region, so that there is a greater opportunity for participation.
- Equally important, it will provide opportunities for individuals of the mainstream culture to learn about organizations, events, and programs being offered by people of color.

Many interviewees commented that this opportunity for access must work in both directions — people in culturally diverse communities need to learn about what is available throughout the region *and* people throughout the region need to learn about what is available in culturally diverse communities. Indeed, this concern that access be available in both directions is at the heart of many of the considerations of the Cultural Diversity Task Force.

While the issue of communication is an important one throughout the region, the particular problems facing minority communities — the clearly articulated feelings of “isolation and frustration” discussed by the Cultural Diversity Task Force — require special efforts to be addressed. The consultants support the Task Force’s suggestion for a program of outreach which demonstrates sensitivity to the special concerns and needs of minority communities. The following techniques were mentioned by the Task Force as considerations when creating a effective information-gathering and sharing tool:

- Individuals in minority communities should be identified to serve as liaisons to the agency maintaining the calendar to assure that information is gathered in a timely and accurate manner.
- Special efforts should be made to distribute the calendar in minority and ethnic communities in order to assure the greatest possible visibility for this activity, perhaps by distribution through non-traditional locations such as churches, social organizations, and parks.

Recommendation VI.1 also proposes a regional periodical to disseminate information on the arts to the general public and this publication can have a substantial impact on the availability of cultural information. Among the materials appropriate for this publication might be a series of articles on arts organizations and artists from diverse cultural backgrounds or on visiting artists from other cultural traditions. Highlighting these individuals or

groups would provide an opportunity for them to reach a much larger public. Efforts must be made to distribute this publication broadly within culturally diverse communities to assure the greatest possible benefit.

It will be important for the editorial body responsible for this publication to make sure that it has sufficient representation of ethnic and minority individuals to assure that adequate coverage is provided. In addition, it will also be important to weigh carefully the balance between a "local" versus a "tourist" orientation to the publication. It may also be possible for articles appearing in this publication to be re-run by other regional magazines. For example, in Dade County, Florida, *South Florida Magazine* has run a series of articles on minority arts organizations, assisted by the staff of the local arts agency.

**Recommendation VII.3:**

Programs of outreach and technical assistance should be designed and targeted specifically to ethnic and minority communities.

Aside from problems with communication, the consultants learned that many artists of color work without the benefit of training in the business aspects of art. In addition, many multi-cultural arts organizations are under-capitalized and under-staffed. Frequently their staff members are not trained in issues facing nonprofit managers of arts organizations. The consultants recognize that this problem exists for many small and emerging arts groups as well as for artists, whether multi-cultural or mainstream, and they have recommended a comprehensive technical assistance program to address the issue (cf recommendations III.2 and III.6). Nevertheless, they believe that it will be necessary to conduct some additional efforts to assure that the technical assistance is properly targeted for ethnic and minority groups. Two areas in which such programs might be most useful in addressing the needs of these groups are:

- **Information and assistance with available resources.** Many culturally diverse arts organizations and artists are not aware of the resources that are presently available in the Portland region. Programs specifically aimed at minority and ethnic artists and organizations might provide assistance in grant writing, marketing, portfolio development, promotion, bookkeeping, and other business



issues. Artists might be assisted in preparing strong applications to participate in the artists-in-the-schools and public arts programs.

- **Performance and exhibition opportunities.** Several artists in minority and ethnic communities noted that there are few opportunities to show their work. Performing artists, too, talk about the lack of opportunity for them which can be made more extreme by the fact that they do not work within mainstream art forms. Special programs might provide assistance to artists by helping them gain exposure for their work through exhibitions and performances, both within their own communities and throughout the Portland region. Partnerships between established exhibiting, presenting, and producing organizations wishing to move into more diverse offerings using local artists of color could be encouraged with specific targeted grant funds from the Regional Arts Council as is discussed under recommendation VII.7.

The Cultural Diversity Task Force made two additional points relative to the needs of multi-cultural artists and organizations for services:

1. Technical assistance programs must be offered *in the communities that they are designed to serve*. Not only will this encourage wider participation by people of color, it will educate the technical assistance providers about what is happening in these communities. As one interviewee commented “. . . we want people in the arts from all over Portland to be connected to our community, to visit it, to take an interest and some initiative around it . . . ”
2. The Cultural Diversity Task Force suggests that a coordinator be made available to provide technical assistance, information, and opportunities for networking with culturally diverse artists and arts organizations, as well as neighborhood associations. The consultants agree that such coordination will be critical to the success of the program and recommend that the Regional Arts Council consider this when working on its new staffing structure.

**Recommendation VII.4**

Programs should be developed to assure that culturally diverse individuals and organizations have greater representation on the boards and staffs of arts organizations, as well as public commissions and task forces.

Many individuals in ethnic and minority communities told the consultants that there are few significant outreach efforts from major arts organizations. Indeed, according to the Cultural Diversity Task Force, a priority must be "to reduce or eliminate the alienation of artists and audiences of color from mainstream organizations and activities." Sincere efforts have already been begun to remedy this problem, most notably by the Metropolitan Arts Commission, and the consultants believe that Portland is ahead of the majority of cities in the United States in taking active steps to address the issue. Even so, the boards and staffs of arts organizations do not yet begin to reflect the cultural diversity of the region as a whole.

It will be important to conduct an active and ongoing program to gain the participation of culturally diverse representatives and to assure that they are increasingly involved in the affairs of the arts community on all levels. The consultants note the recently conducted workshop on cultural diversity. Sponsored by MAC, it was offered to representatives of the board and staff of organizations receiving operating support. Such efforts are important and should be continued.

The Task Force made several suggestions for ways to encourage greater diversity in the programming and on the boards and staffs of arts organizations:

- It will be important to develop a continuing series of public meetings focusing attention on these concerns. Opportunities for dialogue are important and should be encouraged. Among questions which might be raised at such sessions are the following:
  - How can our arts programs and audiences better reflect cultural diversity?
  - How can access to programs, resources, and diverse artistic expressions be improved?

- How can we better promote the value of cultural diversity in the arts?
- How can we better promote and exhibit multi-cultural/multi-ethnic artists?
- Mainstream arts organizations must be able to communicate the fact that they are working to understand the context of culturally diverse communities. One way to do this might be to develop a mechanism for these organizations to conduct meetings and workshop sessions in multi-cultural communities.
- It is important to use people of color on boards and staffs as “. . . bridge builders and not just as isolated bodies sitting on a board in order to fill a quota . . . These bridge builders are the first link in helping predominantly monocultural groups to stretch their boundaries and reach out toward diversity.” This is an important point. According to the survey conducted by the Portland Arts Alliance in conjunction with Arts Plan 2000+, only 5.6 percent of the boards of directors of responding organizations were people of color. This is clearly less than the representation of people of color in the general population and one important way to increase that number is to work effectively with those individuals already on boards to create stronger links to culturally diverse communities.
- Predominantly white groups that are working to reach out to diverse populations must be sensitive to the “style” of how these populations conduct business. As the Task Force points out, “. . . diversity comes in different ways and is articulated in unique styles. . . . [Therefore] part of the . . . outreach for various multi-cultural/multi-ethnic communities should be in a style that is comfortable for them.”

**Recommendation VII.5**

Major arts organizations should be encouraged to increase their emphasis on culturally diverse programming.

It is important to heighten the community's awareness of the rich cultural diversity of the Portland region. Increasing the number of performances and exhibitions with multi-cultural components by the major arts organizations is one important step that might be taken. There is already some effort in this direction. PCPA has presented the Northwest African Ballet Company

to full houses with an estimated 60 percent of the audience made up of people of color. In addition, Portland Arts and Lectures presented August Wilson to a substantially mixed audience. The Art Institute has sponsored several film and museum exhibitions and related programs dealing with Asian, African-American, Native American, and Hispanic artists and communities. According to one interviewee, "When programming that is appropriate to attract minority audiences is offered, the audiences show up."

Nevertheless, there is still room for increased activities in presenting the art of contemporary Native Americans, Hispanics, African Americans, Vietnamese, Japanese, Chinese, and others. Exhibitions and performances by artists and performers of color need to be encouraged. In many cases, mainstream organizations may need to stretch traditional definitions of their art forms but in doing so they will encourage broader audience participation. Awarding additional points for multi-cultural programming in grant award decision-making should be considered to underline the importance placed on these activities.

Arts organizations must convey a sense of commitment to diversity in their programming and in their administrative structure. To accomplish this, innovative steps may be necessary. One possible step would be to match smaller, multi-cultural organizations with larger, more established ones. Internship programs might allow for more effective staff training and for orientation to the management techniques of the larger organizations.

**Recommendation VII.6:**

Efforts should be made to take advantage of the arts and cultural implications of Portland's role as a Pacific Rim City.

The Cultural Diversity Task Force highlighted the importance of understanding world cultures. They commented that, "The twenty-first century will be a century of global culture, economics, and politics. In order to maintain America's position as a world leader, it is essential for Oregonians to understand international cultures." Of particular significance in the Portland area is the influx of Asians. The population of Asians in the Tri-County region has increased in the ten years between 1980 and 1990 by 110 percent. In addition, the Portland region is increasingly attractive to Asian businesses. For example, a major Japanese firm — Nichia Ltd. — recently chose Portland for its North American headquarters. As one interviewer

commented, "Portland has two major opportunities for bringing new people and business interests in. One is Californians and the other is people from the Pacific Rim."

As Portland increasingly becomes an international city, with strong ties to Asia and the Pacific Rim, it will be important to develop links to other cultures abroad, specifically Asian and Pacific Island cultures. There are several ways that this might be done:

- Ties should be established between Tri-County sister city programs and arts organizations to insure that opportunities for cultural exchanges are explored.
- Programs which highlight Japanese, Korean, Chinese, and other Asian art forms should be developed with Asian corporations targeted for underwriting.
- Joint promotions between Tri-County and Asian travel industry representatives should be developed to promote Asian tourism in the Portland area, highlighting the cultural amenities of the region.

Already some positive steps have been taken in this direction. The Art Institute in particular has sponsored artist and faculty exchanges with China and has developed joint exhibitions which have travelled to Japan. One of its exhibitions, featuring Japanese contemporary art, brought artists and the curator from Japan to the Portland opening and received funding from Japanese corporations located in the region, from the Japan Foundation, and from the Consulate General's Office in Portland. Other organizations should follow the lead of the Art Institute in forging such international connections in programming and funding.

**Recommendation VII.7:**

Steps should be taken to assure an equitable allocation of available funds. In addition, the Regional Arts Council should consider establishing a special grants program called the "Cultural Diversity Initiatives Program," to provide funding for multi-cultural arts activities by both mainstream and culturally diverse organizations.

The Cultural Diversity Task Force strongly asserts that "an equitable allocation and distribution of available funds should be assured, taking into ac-

count multi-cultural/multi-ethnic activities, artists, and organizations." Clearly, without such action, all the initiatives in this section will be more difficult to achieve. The consultants wish to stress that "equitable" does not necessarily mean that grants funds need to be allocated to organizations or artists of color in exact relation to their percentage representation in the population. Many factors must be taken into account in allocating funds such as audience reach and impact, budget size, and management stability. Nevertheless, some effort should be made to move toward distribution levels that approximate population representation.

To this end, the consultants believe that a thorough statistical analysis of MAC grant applications and grant awards should be conducted to assure that available funds have been awarded in a way that is consistent with the cultural make-up of the community. It is important to note that appearances of inequities can be as damaging as the reality. Thus, this research is worthwhile whether one believes that inequities exist or not. Indeed, the major effect of this research may well be to establish a base-line of information and to reassure people of color that there is a concern about this issue. Since one of the major problems a funder such as MAC must deal with is the availability of fundable multi-cultural organizations, it is wise to review data from several years to determine whether any patterns emerge over time.

The Task Force also points out that "minority and ethnic artists need assistance and easy access to knowledgeable human resources to assure the availability of material resources," suggesting that opportunities for technical assistance should be developed. The consultants agree and have outlined a program for such assistance (cf. recommendation III.2 and III.6). However, the consultants believe that it will also be important to provide an additional program to assist arts organizations with funding for multi-cultural initiatives.

**A New Grants Program:** The new Regional Arts Council should consider establishing a small grants program called the Cultural Diversity Initiatives Program, which would allow any arts organization in the region to apply for funds to undertake a special project involving culturally diverse artists or performers or benefiting culturally diverse communities. In addition, funding would be available for specific outreach or technical assistance for staff and board of arts organizations. Among the types of projects the consultants envision in this program are the following:

- theatrical performances which showcase the work of Hispanic, Asian, Native American, or African American writers and/or actors
- an exhibition at the Art Museum highlighting contemporary African art
- a project to provide training in conducting market research for a consortium of minority and ethnic arts organizations
- a workshop on portfolio presentation for artists of color.

**Recommendation VII.8:**

The facilities requirements of neighborhoods and culturally diverse groups should be highlighted as priority needs within the cities of the Tri-County region.

Time and time again, the consultants heard about the lack of adequate cultural facilities in neighborhoods throughout Portland. In addition, they heard about the need for cultural facilities for African Americans, Hispanics, and Native Americans to perform, exhibit, share their culture, and have adequate meeting space. At public meetings held in conjunction with this project, many Native Americans described the importance of neighborhood-based cultural facilities "suitable for ceremonial, religious, artistic, and educational expression." One individual commented on the importance of "opportunities for life-long learning of Indian traditions [which must be] encouraged through the provision of a cultural facility and educational opportunities." In addition, the consultants heard from a Northeast Portland businessman who offered a building for a cultural center for African Americans. There was also talk of the need for a center for Hispanic art in Washington County.

The consultants acknowledge that the need for such facilities has been clearly expressed throughout this planning process. (Part VIII of this report on cultural facilities provides an inventory of projects currently in existence or under consideration.) The importance of these facilities, which are all at varying stages of development, cannot be underestimated. However, it will be imperative that they be considered within the context of an overall cultural facilities planning process, discussed in detail in the following section of this report on facilities (cf. recommendation VIII.7). A careful reading of the recommended process and the priority setting mechanisms described in Part VIII will indicate the importance placed on consideration for facilities

which serve neighborhoods and culturally diverse populations. However, given the great cost of facilities, review should be conducted within the context of a fair, open, and rational process, which is discussed in that section of the report.

The consultants also call attention to the information on facilities for multi-cultural activities provided in Appendix C of this report (cf. pages C.2 - C.9). It appears that centers designed to serve a single, specific cultural group are usually found in communities with higher proportions of those groups than are found in Portland. In addition, many centers provide social service programming as much or more than arts or cultural programming. These considerations should be borne in mind during the planning for any cultural facilities to assure that the service area and program are effectively designed. At the same time, it will be important not to promote the isolation of specific minority groups in particular neighborhoods by locating dedicated facilities there; indeed, the networking of community facilities and their wide use by people from within and outside of the neighborhoods should be a goal of any facility development plan.

**Recommendation VII.9:**

A Working Group on Cultural Diversity should be established to provide relevant perspective to the Regional Arts Council as it implements the recommendations of Arts Plan 2000+.

The consultants are convinced that the substance of the recommendations in this section (as well as relevant recommendations in other sections) will go a long way to address the concerns of the various multi-cultural constituents with whom they have met over the past months. However, there is a difference between making a recommendation and seeing it through to implementation. It will be important for some *formally established* body to provide oversight, guidance, and substantive suggestions to the group that is responsible for implementing the recommendations that grow out of the Arts Plan 2000+ process.

The Cultural Diversity Task Force has proven to be an effective group and its members, if they are interested, should be considered for inclusion on a Working Group on Cultural Diversity — a standing committee to advise the Regional Arts Council. Membership should be supplemented with



other interested individuals from throughout the Portland region to assure adequate geographic representation as well as ethnic and cultural diversity.

The Working Group on Cultural Diversity should be charged with providing a special perspective on the implementation of the recommendations of Arts Plan 2000+. In addition, this body should serve as a resource for names of individuals from various cultural and ethnic backgrounds to serve on committees, task forces, and other bodies addressing the cultural plan. Finally, this group could "serve as a 'go-between' for mainstream galleries, museums, performing arts organizations, and multi-cultural, multi-ethnic artists," according to the Cultural Diversity Task Force.

It is possible that this body may become more active and serve as a high visibility forum for heightening awareness of the cultural concerns of people of color. In Dade County, Florida, for example, the Multi-Cultural Arts Coalition is made up of artists and administrators from multi-cultural arts organizations. It produces a newsletter, coordinates events, serves as an advocacy group, and co-sponsors technical assistance workshops. Such a role for this Working Group might provide the necessary impetus to bring more artists of color into the activities of mainstream cultural organizations.

## Part VIII

# Cultural Facilities

An important component of this planning process was an assessment of cultural facilities. During the course of the consultants' field work, interviews with users and managers of facilities throughout the Tri-County area were combined with tours of various facilities. In addition, Arts Plan 2000+ convened a Cultural Facilities Task Force and METRO sponsored a study of facilities which also informed the consultants' work.

The Arts Plan 2000+ Task Force report begins with the following statement:

*"The Facilities Task Force asserts that regional, community and neighborhood public and private cultural facilities are essential to the production of and accessibility to the arts of our region. In that a variety of facilities are used, renovated or built by a variety of public and private agencies throughout the region, the results may create unnecessary duplication, inefficient use of funds, underutilization and lack of some facilities."*

This is an excellent starting point for the consultants' discussion of facilities which will focus primarily on three important issues:

- the challenges facing the Portland Center for the Performing Arts (PCPA)
- the need for facilities to serve regional, neighborhood, and multi-cultural constituencies
- the development of a regional perspective on future facilities development.

## The Portland Center for the Performing Arts

### **Recommendation VIII.1:**

Arts Plan 2000+ should endorse the major recommendations of the METRO Facilities Study Sub-committee on the Portland Center for the Performing Arts with the caveat that recommended new sources of public funding must be part of a comprehensive solution for cultural funding in the region.

The PCPA has, in many ways, become the focus of public attention in the region's cultural life, particularly with respect to the performing arts. As the primary venue in the region for the major local performing arts institutions and touring performances, the PCPA's public image reflects the pride of the community in its cultural institutions. It has also come to symbolize fundamental, popular misunderstandings about the finances and operations of nonprofit arts organizations in general.

Concurrent with the Arts Plan 2000+ study, a METRO Facilities Study analyzed the future of some of the cultural, recreational, and sports facilities in the region. One of its sub-committees looked at the current challenges facing the PCPA, not the least of which is an operating deficit estimated at approximately \$900,000. That sub-committee has issued a series of recommendations intended to address the financial challenges facing the facility, while acknowledging that much of the public debate surrounding the PCPA's funding and operations springs from some basically incorrect assumptions.

By most meaningful measures, the PCPA is a successful facility, serving a very broad cross-section of the community, supporting the development of the City's major performing arts organizations, and achieving a very high level of use overall. For a variety of reasons, however, there is an expectation that the PCPA should be self-supporting from its own operations. The PCPA Sub-committee has examined extensive data which convincingly demonstrate that no comparable facility in the U.S. operates on such a "break even" basis and that such expectations are not realistic. This is a position which the authors of this report endorse and which is confirmed by an analysis of the finances of comparable facilities reported in Appendix B.

The PCPA Sub-committee has recommended, therefore, that the terms of the debate be redefined in the public mind, and that appropriate steps be taken to address the operational and financial challenges faced by PCPA. In summary, the Sub-committee has recommended that:

- All appropriate measures be taken to reduce the need of the PCPA for public support by enhancing earned revenue opportunities and improving the efficiency of the Center's operations to the greatest extent possible.
- A dedicated source of public funds be developed to support the ongoing operation of the Center sufficient to allow for necessary capital improvements, reasonable rental rates and user fees to benefit local user organizations and audiences, and to implement programs such as education and marketing which support the facility's mission.
- A strong effort be undertaken to shift the region's image of the PCPA from an emphasis on cost to an emphasis on the economic impact and quality of life contributions that the PCPA makes to the community.

The consultants endorse the Sub-committee's recommendations with the following caveats:

1. Under recommendation IV.3 of this report, the consultants discussed the need for dedicated sources of funding for a variety of cultural programs and initiatives in the region. Clearly, the future operations of the PCPA fall within the intended use of such funds. However, the PCPA's needs must be seen in a broader context of undercapitalization of the cultural sector. Without new sources of funding to stabilize arts organizations, tend to the needs of individual artists, encourage greater public participation in the arts, serve the needs of multi-cultural constituencies, provide for arts education, promote cultural tourism, and tend to regional cultural development, the cultural life of Portland and the surrounding area cannot flourish. If the PCPA's needs are seen as the exclusive or major challenge to be addressed by public funding, Arts Plan 2000+ would have to be considered a failure.
2. A second point has been raised under recommendation III.4 of this report which concerns the need for a rental subsidy program of which PCPA would be a primary beneficiary. While the PCPA Subcommittee has recommended a separate rate schedule for local nonprofit organizations

with a discount of up to 25%, the consultants believe there would be wider use of the PCPA (and other facilities) with an additional rental subsidy program which would be operated through a grants program by the Regional Arts Council. This is not intended to contradict the Subcommittee's recommendation, only to augment it.

### *Facilities to Serve Neighborhood and Multi-cultural Constituencies*

**Recommendation VIII.2:**

The City of Portland (and other municipalities in the region) should develop clear policies which state priorities for siting and funding small, affordable facilities to be used by emerging cultural institutions and neighborhood constituencies.

Interviews with representatives of arts organizations, audience members, and members of the interested public revealed that the most often cited facility need in the region is for smaller venues located near local users and audiences. The frequently expressed attitude is that while the centralized facilities of the PCPA serve an important function for the major arts organizations, they are too large, expensive, and difficult to book and use for most of the community-based organizations in the City and the region. Even with discounted rates and rental subsidies, they will never become permanent performance homes for most of the performing organizations in the region. Furthermore, emerging cultural groups and those serving multi-cultural audiences would prefer facilities located in the neighborhoods which comprise their constituencies.

Currently, several facilities in Portland partially address these needs. For example, Metro Performing Arts consists of performance and training programs at various neighborhood facilities operated by Portland Parks and Recreation. These facilities include:

- **The Firehouse Theatre** — a converted firehouse which is used for performances and provides office space to several smaller cultural organizations. A private, non-profit organization has provided funding for some of the programs housed in this theatre.

- **Eastside Performance Center** — a theatre complex within a building of the Portland Public Schools which houses several performance programs.
- **Mt. Tabor Annex** — a former grade school which has also housed a variety of programs.
- **Carousel Courtyard Theatre** — a private theatre located within a commercial real estate development, housing a Children's Theatre program.
- **The Laurelhurst Dance Studio** — a one room facility, and four rooms at Rice School, both used for dance programs.

In the near term, the future of these facilities and the Parks and Recreation programs which they house is uncertain. Parks and Recreation staff are anticipating deep cuts in the Metro Performing Arts programs in response to the budget imperatives of Measure 5, possibly eliminating most of the facilities and staff. At this time, Mt. Tabor Annex is scheduled to be closed and the future of the remaining facilities is undecided.

Additional facilities serving the needs of smaller cultural organizations in Portland include:

- **The Interstate Firehouse Cultural Center**, another City-owned and funded facility consisting of a 110-seat theatre, a dance studio, and gallery space, is used by a number of local performing groups as well as a resident theatre company, and it serves a neighborhood constituency.
- **Echo Theatre**, leased by the Do-Jump Dance Company, is a privately owned theatre seating 165, operated by the dance company and made available to a number of other cultural organizations. It is an informal space, available to users at moderate cost.
- **The Northwest Service Center**, a converted church, serves a neighborhood constituency by housing social service programs during the day and performances in the evening. It is a favorite venue of folk musicians and ethnic music and dance groups. Also available for modest rents, it can seat an audience of 850.

Unfortunately, there is no consistent public policy guiding the development of or funding for neighborhood-based facilities. In view of the expressed needs of the organizations represented in the consultants' interviews, it is ap-

parent that a coordinated and equitable approach for such facilities is an important element in future planning for the various municipalities in the region, especially the City of Portland.

It is the consultants' opinion that planning for small facilities needs to be done, at least in part, by municipalities since in most cases local governmental units are involved in the building and/or operation of smaller facilities which tend to be local in impact. In the case of the City of Portland, planning for small facilities should begin with the development of a policy which clearly states priorities for siting and funding those facilities to be used by emerging cultural institutions and neighborhood constituencies. The policy should provide guidelines for deciding among projects competing for public support, and it should provide guiding principles for the design and use of the facilities. The City might appropriately turn to the Metropolitan Arts Commission to develop such policy for three reasons:

- First, it is quite common in the United States for local arts agencies to draft cultural facility policies for City governments. They know the needs, they know the industry, they know the constituents, and they know how to work within local government.
- Second, any policy development for new facilities has important implications for the programs of the local arts agency. In other municipalities with cultural facility policies, there is frequently a close relationship between that policy and the local arts agency's own grants programs. In Dallas, for example, certain City grants are awarded based on calculations of the cost of facility use for the funded organization.
- Third, since MAC will eventually become a regional arts council, it can provide technical assistance to other municipalities wishing to develop facility policies. Having gained the expertise in working with the City of Portland, it can share it with other cities in the region.

### Guiding Principles for Neighborhood Facilities

As the City of Portland and other municipalities develop policy with respect to small cultural facilities, several special considerations need to be borne in mind. Emphasis on neighborhood constituencies and emerging organizations implies specific requirements for the facilities which will serve them:

- **Appropriateness:** it is important that any facility be appropriately designed for its users. For example, developing local performing organizations can be absolutely overwhelmed by a facility which is too large. Their small audiences will feel alienated by a half-empty auditorium and the performers will not be able to play to a large, half-empty house. Similarly, an inappropriate acoustic environment, a stage which is too small, inadequate lighting and climate control for exhibitions and many other possible design problems will make a facility difficult to use, and will defeat much of the purpose behind its development.
- **Quality:** it is almost impossible to overemphasize the importance of providing the highest quality facilities for both community and professional use. Simply put, poorly designed and equipped facilities defeat their own reasons for being. That is, they cannot be used to present high quality art and entertainment, nor can they effectively serve to stimulate the development of the City's indigenous arts community. In addition, should better facilities become available, poorly designed facilities may be under utilized by both arts organizations and their audiences. This is a particularly important concept when renovation of existing facilities or adaptive reuse of other types of buildings is being contemplated, as is often the case for neighborhood facilities, for the resulting quality and utility of the facility should be of utmost importance.
- **Economics:** the economics of facility construction and operations also play an important role in identifying the appropriate facility for development. Some types of spaces, such as black box (or "studio") theatres, are by their nature inexpensive to build and maintain, require few staff to operate, and are relatively simple for community groups to use effectively. They can therefore be offered to community users at modest rental rates without requiring tremendous operational subsidy. However, the same organization, in a large formal theatre, will require the supervision and assistance of theatre professionals in order to use the theatre safely and effectively.
- **Cost:** finally, the ability of specific organizations to pay for the use of appropriate facilities is another important consideration. It is also one which can be more complicated than it might seem at the outset. For example, the availability of a new facility of quality has an important impact on an organization's total operation, often allowing for higher ticket prices and new publicity opportunities



while also requiring a significant increase in production expenses to produce a higher quality presentation in the new space.

Two other points should be made in conjunction with policy development for facilities at the level of municipalities:

1. In developing facility policy, the definition of facility should be broad enough to include arts incubators — a specific kind of cultural facility described under recommendation IV.8. Arts incubators could fulfill many of the needs of smaller arts organizations (and, in some cases, artists) provided that they are sited in appropriate locations and are properly designed and operated.
2. The facility policy should explicitly mention the need to coordinate with region-wide facility planning which is described in the remainder of this part of the report.

### *The Regional Perspective on Future Facilities Development*

**Recommendation VIII.3:**

The new Regional Arts Council should institute a planning process for new cultural facility development projects in the region.

A unique opportunity exists to plan regionally for future development of cultural facilities that serve the entire Tri-County area or are located throughout area. This is because the Arts Plan 2000+ effort coincides both with a growing realization of the truly regional nature of the arts on the one hand and a growing assertiveness of the individual character of many communities outside of Portland on the other.

Few high quality facilities exist outside of the City at this time. Two which may provide interesting models for future facility development in the region are the Lakewood Center for the Arts and El Centro Cultural.

- Lakewood Center for the Arts, located in Lake Oswego, is a converted elementary school which includes two theatres (200 seats and 85 seats), exhibit space and an extensive schedule of events including an annual arts festival. The programming is oriented to the local community, and the Lake Oswego Community Theatre,

the leaders in the development of the Center, are slowly moving toward professional status. A new, larger theatre is now under construction.

- El Centro Cultural serves the Washington County Hispanic community through a variety of social service and cultural programs. The broad range of cultural initiatives includes a Spanish radio program aired twice each week, an arts and crafts cooperative, a folkloric dance group and numerous festivals and celebrations.

Several facilities in various stages of planning and one facility that is in the first stages of a major expansion were described to the consultants in some detail during the planning process:

- In Portland, the Oregon Art Institute is already engaged in a project to greatly expand its downtown Park Block facilities. The facilities house the Museum, College, and Film Center. The Institute acquired the Masonic Temple building and an adjacent parking lot in 1990 as the first phase of facility expansion. Master Facility planning is scheduled for completion by July of 1992 and the project may well be among the region's largest over the next decade. Like the PCPA, it is an excellent example of a Portland-based facility project which will have a dramatic regional impact.
- In Beaverton, the only municipality in the region other than Portland with an arts council designated and funded by the City, two different theatres have been proposed for renovation into community facilities. The Fanfare Theatre, a Schubert Theatre now being used as a warehouse, and the Westgate, a more contemporary movie theatre, each have been examined for their renovation potential. The Central Beaverton Plan calls for a facility, and the political climate may be favorable for either renovation or a new facility in the near future.
- The Mount Hood Cultural Center Committee was formed in 1990 to pursue the construction of an 800-1,200 seat theatre facility in northeast Clackamas County. A site owned by the Sandy Union High School District has been designated by the Committee for the project, preliminary designs and cost estimates have been assembled, and public testimony has been solicited on the project.
- Following the activities of local Native American advocates, the City of Portland Bureau of Community Development commissioned a feasibility study for a Portland American Indian Cultural Center,

to be located in the metropolitan area. The study recommends the construction of a 56,000 square foot facility at a cost of \$6.2 million. The Center would provide a variety of social services and cultural programs, as well as serving as a repository for important tribal objects.

In addition, the Facilities Task Force provided an inventory of other proposed facilities. Their initial list included:

- Artists' Initiative Project Museum
- Beaverton Outdoor Amphitheater
- Children's Museum
- Classical Chinese Garden, Museum and Cultural Center
- Oregon Trails Project, Oregon City
- Portland Center for the Arts Studio Space
- Portland Art Museum addition
- Trail Blazer/Multi-Use Arena
- Willamette River Band Shell/Outdoor Theatre
- Zoo Expansion.

A second list included:

- Arts component at Union Station
- Artists' studio and rehearsal facility
- Cultural components of new private development projects
- Fox Theater renovation
- Local community projects: Forest Grove, Hillsboro, Tigard, etc.
- Shared facility for regional arts organizations
- Washington County Historic Living Farm.

The variety and potential regional impact of the proposed projects clearly points to the need for a coordinated effort to plan for cultural facilities on a regional basis. The Arts Plan 2000+ Facilities Task Force stated that "facilities could be weighed through a public process for possible inclusion in a comprehensive plan for regional, community, and neighborhood development of facilities. An open public process to set priorities for

which facilities meet the largest public good should be undertaken by the region.”

The consultants agree with the Task Force. Many aspects of planning for new facilities require vision in the face of uncertain outcomes long down the road. One of the greatest dangers in any planning process is that initial enthusiasm for a good idea may be allowed to obscure the practical, financial, and operational realities that will face those who ultimately have to build and operate the facility. A good, hard look at a facility plan (and all of its implications) must be taken at the outset, and there must be subsequent check points to make sure that the plan is viable even after the initial stages. Human nature and politics should not allow an initial idea to “take on a life of its own.” Rather, rational analysis and practical planning considerations must guide the development process. Such a process is not intended to dampen enthusiasm or stifle creativity — it should encourage both.

It should be pointed out that no planning process will be able to mandate what any individual community might choose to build. Municipalities will always be free to pursue their own plans. But resources are scarce and regional constituencies are growing. The best allocation of those resources and the best delivery of services to those constituents can only be accomplished if a regional perspective and plan is provided.

**Recommendation VIII.4:**

The regional planning process for facilities should be consistent with the provisions of Arts Plan 2000+ and should represent the overall interests of the region as well as those of specific cultural constituencies.

The purpose of creating a structured planning process for new facilities is threefold:

- Such a process helps develop the best cultural facilities possible by ensuring that they are properly located, designed, used and managed.
- It ensures that the interests of the cultural community as a whole are served by a rational allocation of resources for planning and capital construction.

- It encourages a regional perspective on new and existing facilities, supporting the broader marketing and funding initiatives to be directed by the new Regional Arts Council.

Several aspects of the planning process are critical to its success:

- First, the planning process should be mandated for any facility project that will seek local public funding either for capital construction, programming, or operating expenses. This can be accomplished if local municipalities agree to it as part of their municipal cultural facility policies. However, even without such agreement, the Regional Arts Council can have as a stated policy that it will not provide funds to any new facility which has not been through the mandated planning process.
- Second, it is recommended that the Regional Arts Council provide partial funding for some of the most important and costly aspects of planning for new facilities. This would include initial feasibility work, design development, fund-raising feasibility studies, or other costs. The planning process would require that facility advocates prove various kinds of viability before the Regional Arts Council would entertain applications for funding (as will be described below).
- Third, while it may be possible to "fast track" the planning sequence to meet special opportunities, *the process should be completed in its entirety in every case.*
- Fourth, it is recognized that there are certain facility projects such as the Art Institute expansion which already have gotten beyond where they could be subject to the proposed process. The process could obviously not be applied in these cases and they would have to be considered on an *ad hoc* basis.

It would be a wise course to encourage *any* proposal for a new facility to follow the planning process, regardless of the presence or absence of public funding for the project. The benefits of a thoroughgoing planning procedure will be the same for any project. By encouraging that an adequate planning process be implemented, any facility which is built will have the best possible chance of fulfilling its intended functions and supporting the overall cultural development of the region.

### Guiding Principles for the Planning Process

Any planning structure, and certainly any planning structure which embodies public policy, must have guiding principles which consistently shape it and inform those who will be participating. The guiding principles for the recommended planning structure for new facilities development in the region, based in part on the Task Force's recommendations, are as follows:

1. *Consistency* — The planning process must be designed so that it can be consistently applied over a wide variety of proposed projects.
2. *Fairness* — It is essential that all participants be treated fairly, and that their ideas be given formal and respectful consideration.
3. *Recognition of Cultural Diversity* — The cultural richness and diversity of regional cultural institutions and audiences must be supported by the development of useable and appropriately located facilities.
4. *Timeliness* — Each step of the process must be accomplished in a timely fashion.
5. *Assuring the Development of Excellent Facilities* — A critical result of the process must be the development of high quality facilities, properly designed, equipped and operated for their intended uses.
6. *Avoiding Excessive Costs at the Outset* — It is unfair to burden a potentially good idea with costly studies when a project is at the conceptual stage. Constituents deserve to have their plans thoroughly reviewed in concept before being required to invest heavily in feasibility analyses.
7. *Proving Need and Capability* — It should be the responsibility of the cultural organizations who will participate in developing or using a proposed facility to provide convincing evidence that they will be able to use the new facility to their benefit, and that they have adequately evaluated the impact of the new facility on their future operations.
8. *Demonstrating Professional Analysis* — The technical analysis of the project must at each point represent professional-level expertise and judgement.
9. *Accurately Analyzing Costs* — The planning process must result in accurate analysis of capital, operating and other foreseeable costs.
10. *Cost Sharing* — Resources for the execution of professional planning studies and thorough review of proposed projects should be provided, in part, by the new Regional Arts Council.

### Recommended Facility Planning Process

**Recommendation VIII.5:**

The new Regional Arts Council should be the convener of a Regional Cultural Facilities Planning Group. This group should consist of expert staff-level representation of METRO, MERC, local planning agencies, and regional cultural institutions.

The function of the Regional Cultural Facilities Planning Group will be to meet with staff and board-level representatives of cultural organization(s) and/or municipalities interested in specific cultural facilities projects. The Planning Group will work cooperatively with these sponsoring entities to develop and evaluate proposals. At the close of each stage of the planning process, the Planning Group will recommend to the new Regional Arts Council either that the project proceed to the next stage of planning or that consideration be discontinued. This recommendation will be made through the analysis of key questions delineated for each stage of the process. It will also constitute a formal recommendation to the Arts Council as to whether that agency should endorse and/or recommend public funding for the project.

Following each stage of the planning process, the Regional Cultural Facilities Planning Group will provide its findings to the new Regional Arts Council and the participating institutions and municipalities in order to assist those groups in their deliberations concerning the project.

The new Regional Arts Council should serve as the convener of the planning body for several reasons.

- First, the new Regional Arts Council will be charged with implementing Arts Plan 2000+, which will be the single most directive statement of public policy which may be applied to the planning process on a regional basis.
- Second, the new Regional Arts Council will have the comprehensive regional representation and perspectives necessary for a planning effort of this type.

- Third, the direct constituents of the Regional Arts Council will include the cultural organizations which will participate in the facilities proposals.

**Recommendation VIII.6:**

The planning process should thoroughly evaluate both the proposed facility project and the impact which the completed project will have on the participating cultural organizations and the communities in which they are located.

According to the Arts Plan 2000+ Facilities Task Force:

*"Too frequently, cultural facilities are built by enthusiastic, well meaning and dedicated citizens and officials who do not ask enough questions first, who may not even know the questions to ask. Facility development with inadequate planning can and does lead to wasted resources and poor service to constituents."*

The Task Force proposes the following as part of the solution:

*" . . . Public and private agencies who wish to develop cultural facilities (must) clearly define their organizational mission and organizational structure and provide justification for the proposed facility within the context of said mission and structure."*

The consultants agree that it is important to evaluate the true capabilities of the organizations which will be using the facilities and/or providing capital or operating funds for the project. Therefore, the proposed planning process places an emphasis on evaluating the participants, their capabilities and plans, and the potential impact that the new facility may have on their futures.

The intent is not to create an adversarial burden of proof for the participating organizations or municipality. Rather, it is to ensure that the full ramifications of the new facility are understood by all the involved parties. It is unfortunately true that in many communities the availability of new facilities has set in motion a process by which some user groups have undergone rapid, unplanned, and overwhelming growth, or have encountered crippling, unforeseen expenses. Clearly, the time to evaluate the ability of the



cultural constituencies to use a new facility effectively and to meet the resulting financial and managerial challenges is before the facility is constructed.

Limits on the available resources for cultural facilities (both now and for the future) and prudent public policy dictate that the financial implications of any proposed project be thoroughly analyzed in advance of the commitment of public (or private) funds. In a broader context, however, it is clear that resources for all regional cultural institutions are limited, and the impact of facilities development on the larger need for programming and operational funding should be well understood.

For example, a regional fundraising program recently completed for a major performing arts facility in a southern state had the unintended side effect of severely limiting the availability of capital and operating funds for the region's smaller arts organizations. A more thorough analysis of the project, from a comprehensive, regional perspective, could have prevented the hardships and conflicts which subsequently occurred.

**Recommendation VIII.7:**

A three-stage, progressive planning sequence should be implemented which allocates appropriate resources to the analysis of proposed projects in each of the three stages.

The recommended planning process consists of the following sequence:

- Stage I: Initial Project Exploration
- Stage II: Feasibility Analysis
- Stage III: Design Development, Fund Raising, and Implementation Planning

Each of these planning stages is described below and the process is summarized in a table at the end of this part of the report.

**Stage I: Initial Project Exploration**

An assessment is made at this stage of the proposed project's appropriateness for further investigation and eligibility for Regional Arts Council planning support. During this first stage of project development, the Cultural

Facilities Planning Group will meet with representatives of the organizations or municipality sponsoring the proposal. The Initial Project Exploration stage is intended to occur before extensive investment is made in expert studies and documentation. Determinations and recommendations made by the Planning Group at this stage are preliminary, and the purpose is to identify projects which have sufficient merit, organizational credibility, and potential for funding to justify further investment in development and analysis.

The central question which the Planning Group must decide at the completion of Stage I is: *Is the proposed facility concept appropriate for detailed study and evaluation?* Areas for joint exploration by the Planning Group and the sponsoring organization(s) in order to answer this question include the following:

- Is the proposed facility project consistent with the intent of Arts Plan 2000+ and any other relevant policy documents? According to the Task Force, organizations must “show that the new facilities will meet needs within the region that are consistent with an overall comprehensive cultural plan.”
- Does the proposed facility project appear to be appropriate for its intended use and do the initial concepts for its use indicate a reasonable presumption of need for the project?
- Does the proposed facility meet the needs of a broad public which encompasses the multi-cultural richness of the region?
- Are the organizational participants credible and do they have the personnel and financial resources available to continue the planning process?
- Are funds potentially available from identifiable sources to implement the project?

The Regional Arts Council may choose to develop technical assistance resources for organizations which wish to propose facilities projects. These could take the form of staff time devoted to training and orientation prior to the involvement of the Planning Group, provision of outside expertise through workshops or individual sessions, or creation of printed materials which could guide each organization’s initial efforts.

The time required for an initial exploration of a potential project is highly variable, depending on the sophistication of the organization(s) presenting

the project and the clarity with which initial needs and opportunities can be identified. It is possible that a "good idea" could stay at this stage of investigation, requiring periodic involvement with the Planning Group, for an extended period of time. However, the requirement that a project be formally endorsed by the Planning Group before entering the next stage of study can help prevent an unfocussed, inadequately funded, or incomplete feasibility analysis from being undertaken.

Upon development of a consensus within the Planning Group that the proposed project merits further development and documentation, the Planning Group will present its endorsement to the various project participants. At this point, funding may be requested from the new Regional Arts Council in support of the second stage of the planning process.

### Stage II: Feasibility Analysis

Stage II constitutes the phase of project analysis commonly known as feasibility analysis. During this stage, the focus is on the merits of the proposed project, its technical requirements, and the ability of all participants in the process to use the facility well. Expert studies will be commissioned to document the following:

- Further development of the facility concept, its use program, and a preliminary building space program. (It should be noted that building design studies, beyond those required to develop a space program and an analysis of site requirements are specifically *not* recommended at this time.)
- Market support and the economic viability of operations, based on the proposed use schedule for the building.
- Evaluation of the capabilities of the participating cultural organizations and the impact on their operations, including analysis of each organization's plans for raising required funding for capital contributions and programming and evaluation of the organization's planning for long-term use of the facility.
- Basic site accommodation studies evaluating initial issues of location, site size, and access.
- Preliminary cost estimates for site acquisition, construction and operations, and an assessment of funds available for the project.
- Development of an initial management concept.

The central question which the Planning Group must decide at the completion of Stage II is: *Is the proposed project viable?* Areas for joint exploration by the Planning Group and the participating sponsoring organization(s), with the assistance of consultants and other experts include:

- Is the proposed facility a cost effective response to demonstrated needs?
- Will the resulting facility be properly and sufficiently used?
- Upon further analysis, is the project still consistent with Arts Plan 2000+ and any other priorities which have been established for facilities development?
- Are funds available for the project and can participating organizations realistically provide their share?
- Will the resulting facility will be effectively and efficiently managed?

Because of the wide variation in size and complexity of the projects which the Regional Cultural Facilities Planning Group may be called upon to evaluate, it is difficult to specify the exact requirements for funding the studies. Generally, feasibility analyses of the type described above will cost between \$45,000 and \$75,000 to complete using competent experts. From time to time, some opportunities may exist which will allow for the use of internal staff expertise or *pro bono* consulting services from within the community. An up-to-fifty percent share of the hard costs for planning might be established as a funding level from the new Regional Arts Council.

Feasibility studies for new facilities usually require approximately six to nine months from the issuance of a "Request For Proposals" through acceptance of the final report documents. In many cases it will be wise to evaluate the results of some studies — such as market studies and analyses of the participating organizations — before contracting for other studies in the sequence.

A positive determination by the Planning Group that the project is viable will constitute an important endorsement to funders and the public at large. Following this endorsement, the project will proceed into fund raising, final design, and implementation planning.

### Stage III: Design Development, Fund Raising, and Implementation Planning

At this point in the process, the involvement of the new Regional Arts Council and the Regional Facilities Planning Group may take a number of forms:

- Representatives of the Planning Group could participate in the selection of the design team and assist in the design process by serving as members of the client group for the designers.
- Planning Group members could evaluate detailed operations plans and operating agreements as a service to the project's principals.
- The new Regional Arts Council could assist in finding funding for the project or could provide direct funding if appropriate.

In thinking about the planning process just described, it is important to underscore some of the major benefits:

1. It assures prudent regional development of facilities where they are needed and prevents duplication.
2. It requires that advocates look at all aspects of financial need including ongoing operational requirements (the PCPA would have benefitted from such scrutiny before it was built).
3. It promotes efficient use of public and private resources.
4. It gives an official seal of approval which will be invaluable to any project when it goes out for funding. Foundations, individuals, voters asked to decide on a bond issue — all will be more likely to support a project that has undergone this level of scrutiny.

The consultants believe that the process for establishing the Regional Cultural Facilities Planning Group should begin immediately, preferably during the summer of 1991, and that pending projects be submitted to the group for consideration as soon as it is possible.

**Recommendation VIII.8:**

As part of its role in planning for new facilities, the Regional Arts Council should maintain a database of existing and proposed facilities in the region.

A key element in effective regional planning for facilities is information. In many communities and even in some state arts agencies, comprehensive facility databases are prepared and maintained. The National Information Systems Project (NISP) — a National Endowment for the Arts' funded project to develop information standards for the arts industry — has published a listing of suggested computerized categories, fields, and definitions that are used by many agencies in developing an electronic database of facilities in their areas.

The Task Force believes that the Regional Arts Council should maintain such a database. The consultants agree and suggest that data on existing facilities in the region be kept on computer and, eventually, paper files be maintained on planned facilities. The Arts Plan 2000+ Task Force has begun to gather information which could be useful in developing this database and is prepared to turn over the information it has collected for this purpose.

*Summary of the Recommended Planning Process*

*Stage I:*

*Initial Project Exploration*

*Is the proposed facility concept eligible and appropriate for detailed study and evaluation?*

*Resources required*

- The time and talent of the Regional Cultural Facilities Planning Group required to meet with the representatives of the interested organization(s) and form the preliminary recommendation.

*Time required*

- Highly variable, depending on the sophistication of the sponsoring organization(s) and the clarity with which initial needs and opportunities can be identified.

*Determinations and next steps*

- A consensus within the Planning Group that the proposed project merits further development and documentation, or a decision that the Planning Group cannot recommend the project in its current form for further investigation.
- Presentation of the Group's consensus to the interested parties and to the new Regional Arts Council.
- If the consensus is to recommend the project, a formal request for funding from the Regional Arts Council, in pursuit of the second stage of the planning process.

*Stage II:**Feasibility Analysis*

*Is the proposed project viable?*

*Resources required*

- Wide variation, depending on size and complexity of the projects.
- Feasibility analyses will generally cost between \$45,000 and \$75,000 to complete using competent experts.
- A recommended up-to-50 percent share of the hard costs for planning to be funded by the Regional Arts Council.

*Time required*

- Wide variation, depending on size and complexity of the projects.
- Feasibility studies for new facilities usually require approximately six to nine months.
- In many cases it will be wise to evaluate the results of some studies before contracting for others in the sequence.

*Determinations and next steps*

- A positive determination by the Planning Group that the project is viable constitutes a public endorsement of the project.

- If the consensus is to recommend the project, final design and implementation plans for the project will be developed, as well as a complete fund-raising plan.

*Stage III:*

*Design Development, Fund Raising, and Implementation Planning*

*Resources required*

- Participation of Planning Group members and Regional Arts Council staff can take many forms as appropriate through the design and construction period.
- The Regional Arts Council may choose to assist in fund raising and/or directly fund the project.

*Time required*

- Through design and construction of the facility.



## Part IX Public Art

This section of the report is the result of an evaluation of public art programs in Portland and the surrounding area. It looks at ways that the programs can be expanded and makes specific recommendations concerning improvements and changes that will strengthen the existing programs. The research for this report was carried out primarily by Wolf Organization consultant, Patricia Fuller, and the report benefitted from the deliberations and recommendations of a Public Arts Task Force.

Portland's historical leadership in the development of public art programs is well known and it has regularly been studied as a model by other communities designing both public and private percent-for-art programs. It is the consultants' opinion that Portland must build on its strengths and make certain changes to continue its national leadership in this area.

This evaluation makes some hard-hitting criticisms of Portland's public art program and, in earlier versions of this report, these were received with surprise and dismay by some readers. It is important to say at the outset that, as in any evaluation, the consultant brings a point of view about the subject. In this case, that point of view is in many respects contrary to Portland's approach to public art, an approach which has emphasized public involvement and acceptance over risk-taking, innovation, and the commissioning of works which are reflective of important contemporary developments and trends in visual art. In fairness, there are other experts who might maintain that Portland's philosophical approach is proper. These individuals might not agree with at least some of the opinions expressed in this evaluation, though others which deal with mechanics rather than philosophy would probably be agreed to by virtually all experts.

It is also important to recognize at the outset that the administrative efforts and the staff contributions to public art in Portland have historically been considerable. Recognition must be given to the many individuals who have given Portland's program its distinctness and to the members of the Public Art Advisory Committee who have already been grappling with many of the issues raised in the report.

### Overview of the Public Art Programs

In the Portland area, public art is carried out on a number of fronts, as a result of policies and legislated mechanisms in place on several different levels of government, as well as in the private sector. The Metropolitan Art Commission (MAC), established in 1973 as a joint cultural programming agency for the city of Portland and Multnomah County, is the most established and experienced sponsor of public art, and continues to be the central player. In 1980, both Multnomah County and the City of Portland passed "percent for art" ordinances setting aside 1% of the cost of new public construction for public art, and MAC was designated to administer the programs. In 1985, the County increased the set-aside to 1.33%, to fund administration, maintenance and public education. In 1989 the City followed suit, and instituted a Public Art Trust Fund (PATF) to receive the public art set-aside monies. Most recently, the County has expanded the scope of its program to extend the percent-for-art set-aside to the purchase of existing structures, the new EXPO Center, and new parks construction.

Public art policies in connection with private development have also been instituted through the Portland Central City Plan, which provides a floor area ratio bonus for public art contributions. Developers are also required to mitigate the effect of blank walls through a choice of options which includes public art.

**Programs in Other Jurisdictions:** As other local jurisdictions have established public art funding mechanisms, they have turned to MAC to administer their programs. In 1987, the Metropolitan Service District (METRO) passed a percent-for-art ordinance, and arranged with MAC to administer the first major project, the new Oregon Convention Center. In the same year the Portland Public School District committed \$250,000 for a pilot five-year public art program in connection with new school construction, which has been administered through MAC.

The growing visibility and climate of acceptance which characterize Portland's public art programs locally have stimulated considerable interest in public art in the surrounding Tri-County area. In Washington County, the town of Beaverton passed percent for art legislation in 1985, and in Clackamas County the city of Lake Oswego is currently developing legislation. Other communities are in various stages of discussing public art, and new projects being planned by METRO and other regional jurisdictions appear likely to incorporate public art funding.

**Public Acceptance:** Portland has been fortunate in that there has been to date no major controversy over public art locally, although negative coverage in *The Oregonian* led state legislators to curtail public funding for art at state correctional facilities. The successfully orchestrated reception of "Portlandia," the monumental allegorical figure commissioned for the Portland Building, apparently did much to build support in the community, and more recently the favorable reception of the art program at the Oregon Convention Center has further consolidated this. It would seem that public art has been largely accepted in the community as a legitimate civic function and a collective value. On the other hand, The Wolf Organization survey indicates that only half of the general public is aware of public art programs and of those who are aware, there are more who feel they should be reduced in scope (24%) than there are who want to see them expanded (19%). This suggests that much more public education may be necessary in conjunction with these programs.

**The Collection:** While Portland's public art collection has grown to a substantial number of works, it has not distinguished Portland as either a leader or an innovator in public art. It was more than once remarked by interviewees that the consensus-seeking local political style doesn't champion the extraordinary. The often-cited desire for "everyone to buy in" was felt by a number of people to have led to what one person called a "pervasive ordinariness" in Portland's public art. Perhaps if there had been more controversy and debate in the community, there would be less concern to avoid it. While controversy can be disruptive, debate can be educational and it can build a more seasoned leadership. While many with whom the consultant spoke were content with Portland's achievement, many others saw a need for more risk-taking and a broader, more challenging representation of contemporary art in Portland's public art. Portland's public art programs have now achieved a level of acceptance where this should be possible.

Based on interviews, the identity of MAC in the community seems often to be largely defined by its role as the chief sponsor of public art. And, not surprisingly, expansion of the public art programs and MAC's role in public art is a frequent theme among those who are involved with the arts. As new regional jurisdictions have begun to proliferate, the idea of regionalizing public art, and an expanded role for MAC, has gained considerable currency.

**Current Status:** While a good number of citizens seem aware of Portland's public art program and identify public art with MAC, in reality Portland's public art programming has grown from a patchwork of overlapping jurisdictions and activities, not an integrated effort. This has had a certain advantage in the early years, allowing MAC the flexibility to try out different approaches as it has moved into new areas. At the same time inconsistencies, unmet needs, and administrative issues developed over the past five years and are now beginning to be addressed. An overview, a planning function, and a framework for establishing balanced priorities over the long term all will need further development in order for MAC to effectively manage and integrate the growing volume of public art activity which it is already committed to manage.

Furthermore, Portland has reached a point with public art where it can now build on the considerable acceptance and support which its programs have garnered to date, and move into some challenging new areas which present considerable potential to establish a leadership role. But MAC needs first to take stock of its existing public art programs, consolidate their successful aspects and address unmet needs. The groundwork will then be laid for MAC to explore a truly regional public art program.

### Regionalizing Public Art

**Recommendation IX.1:**

Public art programs should be expanded regionally with MAC taking a primary role in this expansion.

The first recommendation of the Public Art Task Force was to expand public art programs beyond downtown Portland into the three-county area. Task Force members saw MAC's role expanding, serving as a resource to

local officials and arts commissions, assisting and encouraging all jurisdictions to develop percent-for-art ordinances, and providing the necessary educational assistance in what is a fairly technical area of arts administration. The consultants agree with the Task Force's recommendation.

In the greater Portland area, open space, transportation, land use and other such issues are increasingly being handled on a regional basis. These systems are potentially important arenas for public art as well. Currently METRO has a limited formal relationship with MAC, though the agency is, in the words of one METRO official, "surely missing a lot of opportunities in this area." A planned extension of the light rail system to the west (Tri-Met) will create new opportunities for public art. Presently, Tri-Met has no policy and is not covered by existing public art ordinances. MAC has the expertise and the necessary structures in place to effectively administer public art programs for these agencies, and a wide range of others.

As interest in public art programming continues to develop elsewhere in Multnomah County, and in neighboring Clackamas and Washington Counties, an expanding role for MAC is envisioned, to the point of contracting to administer additional public art programs at the local level. There are some caveats before MAC considers taking on broad administrative responsibilities for public art at the local level in the Tri-County area. With a larger geographic territory will come more diverse constituencies and agendas, making consensus more difficult to achieve. Administrative layering, which becomes inevitable as staff increases in response to workload, tends to distance the administrators from the communities and their particular psychologies and informal systems. And the inevitable tendency towards sameness, a kind of regional stamp to public art born of a single, monolithic administrative structure will be difficult to avoid.

At the same time, MAC has a proven track record in dealing effectively on a regional basis and is well-equipped to plan and implement public art programming on a comprehensive scale.

For this reason, the following is recommended:

- MAC should take a pragmatic approach to expansion, working first to consolidate relationships with the agencies and regional service districts where public art policy is already established or developing, and institutionalizing MAC's role on an ongoing basis with adequate compensation.

- MAC should work with local officials in Clackamas and Washington Counties in the development of legislation, providing technical assistance and exploring relationships with them similar to the relationship with Multnomah County. Where a formal administrative relationship is sought, MAC should be willing to serve in this role, with adequate compensation and funding for this support function.
- Over the long term, MAC should encourage local communities to develop their own public art programming, offering limited technical assistance without straining its staff resources.

### Long-Range Policy and Planning Strategies

#### Recommendation IX.2:

A long-range goal should be to establish a regional planning and policy-setting group for public art which sets priorities and goals on a regional basis.

Public art on a regional scale, such as is contemplated here, needs a planning vision which is flexible and pragmatic; a comprehensive framework which coordinates efforts, identifies opportunities, targets money and effort. Such a planning approach would start with an inventory of projects generating art funds by all participating agencies, as well as desirable sites and projects in planning in the geographic area which represent unfunded or underfunded public art opportunities. A regional planning and policy-setting group would then coordinate the identification of overall public art priorities and goals, and become the facilitator among the various participating agencies, to work towards these goals through specific projects. The plan would be constantly renewed and updated through an ongoing process, and staffed by the MAC public art coordinator.

The planning group would be responsible for developing a kind of "curatorial overview" for public art in the region, balancing the need for diversity of sites; the distribution of public art among downtown and neighborhood and rural areas; local/regional/national representation of artists; inclusion of experimental and mature expressions, of a range from modest to truly significant commissions; and standards of quality and cultural diversity for the collection. MAC, to its credit, has begun to address these issues but

decisions are still made largely in a segmented, isolated and *ad hoc* manner. The result is a collection which some feel has been built without purpose or prevailing standard and which has been defined by the incremental decisions of individual selection committees rather than by careful thought about public art as an aspect of public life in the community.

The planning group's overview would establish priorities and standards while maintaining a sense of diversity and the responsiveness to the particular character of different projects and local contexts. At the same time, the patchwork of overlapping public art activities carried out by different agencies and jurisdictions would become increasingly integrated and responsive to larger and long-term civic and regional priorities and needs. This would, over time, establish a truly regional vision for public art.

The planning group, which could be reconstituted from the present Public Art Advisory Committee, needs to be geographically and culturally diverse and must include people with considerable expertise both in the arts and in regional planning issues. Appointments might be made by various jurisdictions with technical expertise assured by MAC's reserving some slots for its own appointments. Some of those appointed should be art professionals or practitioners with great credibility, ideally including some experts from out of the area as well. The group might be jointly associated with METRO as the regional planning body and with MAC as the public body with specific responsibility for public art. Among specific recommendations associated with this regional planning function are:

- A strong role should be established for this planning group in recommending a public art overview and priorities.
- The group should develop an annual process which inventories funds, projects, and public art opportunities and establishes priorities which can guide the planning process for each jurisdiction and agency's public art activity.
- Since the group would be advisory in nature, part of its role would be to support staff members in their efforts to educate local officials and convince them of the merits of the regional plan and its benefits for their communities.
- Part of the responsibility of the group would be to recommend ways in which the Public Art Trust Fund could be used more creatively and comprehensively to combine and transfer funds among projects. This process should also be used to reduce the

number of projects to a manageable level and combine funds to raise commission amounts to significant levels.

**Recommendation IX.3:**

The regional planning group and MAC administrators should look for additional ways to expand public art in the three-county area including getting more agencies to voluntarily comply with the public art program.

Participation in the public art program is growing, in some cases on a voluntary basis. The City's water and sewer authority, which is voluntarily complying with the public art ordinance, is a potential expansion area. With the parks department, an open policy about pooling art funds has been adopted (other departments also allow pooling within their own range of projects). Within METRO, the zoo has taken a piecemeal approach to public art, simply including it on a project-by-project basis with no planning overview. The zoo is currently doing an update of its master plan, which presents an excellent opportunity to integrate planning for art and selectively target the best opportunities. There is no existing mechanism in METRO to do this. A public art set-aside has not yet been made for METRO's solid waste agency though this is currently under negotiation. (These are more often turnkey, design/build projects. Yet bidders could still be required to include an artist as a member of the planning/design team, or be required to work with one selected by MAC procedures.)

Exemptions are often made on the basis that a given facility is not appropriate for art. MAC needs to educate agencies about the benefits of flexible use of the Public Art Trust Fund to combine art set-asides from inappropriate sites and transfer them to priority sites. MAC needs to work first with individual agencies to develop an overview of the potential of public art beyond this sort of project-by-project approach, and then with the agencies collectively to coordinate an overview and long-term strategy for public art in the area, in order for the truly regional potential for public art to begin to be realized. The regional planning group and MAC staff should see this as a priority for their time and attention over the next several years.

In its wish to see increased and stable funding for public art in the region, the Task Force recommended another way to expand public art — to raise



the percent allocated for art in the various ordinances that are either in existence or might be written in the future. The consultants do not believe that in the present funding climate this objective is realistic, especially since more members of the general public who were surveyed by The Wolf Organization and were aware of public art programs said they would like to see such programs reduced in scale rather than increased (24% versus 19% with 54% saying they should remain about the same). Better strategies to achieve this goal have already been recommended — increasing the number of jurisdictions adopting public art ordinances and encouraging wider compliance with existing ordinances.

### Enlarging the Vision of Public Art

Public art in Portland has great potential to develop. But there must be greater public awareness and support, more expansive thinking about what constitutes public art, and more imaginative ways to involve the private sector/development community into the process.

### Education

**Recommendation IX.4:**

A variety of strategies must be developed to expand public awareness and appreciation of public art including a broader understanding of the place of public art in the life of a community and the role of artists in the process.

The Public Art Task Force established an educational goal “to build a solid base of public support through increased public awareness and appreciation of public art and through on-going dialogue.”

Objectives included:

1. Sponsor critical forums on public art cooperatively with institutions of higher education.
2. Develop educational programs and workshops for developers, planners, architects, and contractors.
3. Include public art in art education curricula.

4. Mount a public relations campaign on public art linked to cultural tourism and economic development.

In general, the consultants concur with both the goal and the objectives. However, they must be placed in the larger context of changing attitudes about public art and artists. The interviews carried out by the consultants revealed some rather superficial assumptions about these matters. Many felt that public art ought to be "functional as well as decorative," "pleasant," "attractive," "fun," and "user-friendly." There were no statements about how public art might be challenging, provocative, or expressive of a cultural or ethnic perspective. Artists were most often described as "unrealistic," "impractical," and "unreliable" but also as "admirably free spirits," and they were usually expected to contribute something colorful and decorative which raised peoples' spirits or improved the view. Those expressing these opinions were as often key decision-makers — developers, city officials, selection committee members, architects — as citizens.

According to artists and members of the Portland arts community who were interviewed, there is currently very little critical dialogue in the community about contemporary art and the place of public art in Portland's cultural development and there are few available educational resources. The contemporary curator at the Portland Art Museum has recently inaugurated a thoughtful, well-informed and provocative program in contemporary art, but there needs to be more of this kind of general education and dialogue. The museum, the Metropolitan Arts Commission, and others interested in public art share in the responsibility of broadening the community's exposure to contemporary art and the introduction of a broader range of contemporary practice. In the case of MAC and the museum particularly, this may be one way to strengthen the links and fostering more dialogue between the institutions responsible for the two largest art collections serving the public.

There are further indications that an educational strategy has not been effectively worked out to encompass a broader approach to issues of contemporary art and artists:

- The Metropolitan Center for Public Art is not well configured or fitted out as a display space, although the location in the Portland Building makes it wonderfully accessible to a broad non-art audience. The exhibit about public art was stiff and didactic. It was not very exciting nor was it effective as an exposition of public

art ideas, as an educational forum, or as a stimulus to critical dialogue.

- Portland's public art tour brochure is unchallenging and does little to introduce ideas which could help people think about art. Rather it is aimed at making art pleasant and non-threatening.

Public art needs to be better understood in order for people to fairly and truly benefit from the public support given it. This is true around the country, not just in Portland. In general, the problem of educating and informing public dialogue about artists working in the public realm has been addressed ineffectively, if at all, by cities and states which sponsor public art. In Portland, efforts to engage the community have been aimed at acceptance, which has been largely won. People have, however, learned little through the public art program about art or the real work of the artist. *Building on the acceptance and good will which it has won, Portland could now be a leader in stimulating an informed, critical and truly public dialogue.*

Among the specific strategies the consultants feel should be considered are the following:

- Develop portable, modular "workshop" presentations on public art, with slides and some take-away materials, which can be used to educate and inform developers, City officials, elected officials, administrators, arts commissioners, citizens, etc. about the broad range of contemporary public art directions and issues nationally and internationally.
- Identify and commit funds for innovative, professionally developed, community-based public art education components which are exploratory, non-curriculum-based, and targeted at non-classroom audiences.
- Structure public art education around *public art in the community*, on the premise that Portland's public art and the presence of artists in the community are extraordinary educational resources.
- *Involve artists directly* in designing and implementing educational activities about public art, in a serious attempt to counter stereotypes of the artist and to illuminate the seriousness of the art-making process and the kinds of issues which characterize contemporary practice.

- Rethink and redesign the Metropolitan Center as a laboratory for innovative educational programming which deals with the interpretation of public art.
- Open a dialogue with the museum and other educational institutions in the community about ways to extend the impact of what each is doing.
- Encourage the public schools to adapt their arts curricula to use public art in Portland as part of materials and works to be studied.

### Expanding Definitions of Public Art

**Recommendation IX.5:**

New mechanisms should be explored to expand the definition of public art including temporary and ephemeral work, new genres, minority cultural content, and other issues.

The consultant and many of those interviewed for this project believe that Portland's public art lacks diversity. It represents for the most part a permanent-object-oriented and site-bound approach to public art governed by architecturally defined needs. Only some of the recent decade's developments in public art are represented in the Portland area. It appears that many who are involved in decision-making about public art have little information from out of the region though, in fairness, some have been involved in the national dialogue. Further, there has been little opportunity for artist-initiated ideas to enter the dialogue about public art in the city.

The Task Force was clearly aware of this problem as they debated the goal of "encouraging flexibility in public art programming, resulting in greater opportunities for artists and more dynamic and accessible art for the public." Two of the objectives under this goal included expanding percent for art ordinances to include performance pieces and temporary installations and encouraging projects with strong cultural identities.

In pursuing this expanded definition of public art, Portland can once again regain a leadership position nationally in this field. The City and the surrounding region should expand its exploration of the growing interest in public art which is site-responsive and concerned with amenity and social use (e.g., support of the participation of artists in streetscape design, col-

laborative relationships between artists and designers in the development of small parks, etc.). The growing interest in temporary or ephemeral works should also be explored by inviting artists to create experimental works for sites about the City, such as the Park Blocks and space along the waterfront, and throughout the region. Portland's public art can also better reflect the City's or the region's cultural diversity. MAC has made increased efforts recently to involve artists of color, but there is very little art with minority cultural content, and even less which does not adhere to traditional Western forms. Portland again could be a leader by opening up the definition of public art to admit not only different artists, but also different cultural forms and expressions as alternatives to the monument, the mural and the placemaker.

There are several ways in which the serious exploration of new forms of public art can be encouraged:

- There should be regular forums in which artists both from the Portland area and from outside advance new ideas for public art. There should be public discussions in which models from other cities are explored.
- The Advisory Committee and the public art staff should become involved earlier in the public art process in exploring innovative ideas and providing the up-front guidance and technical assistance which could encourage more risk-taking and experimentation. There should be a priority placed on exploring new kinds of projects, especially those which are modest and small-scale, and carry a strong alternative cultural stamp.
- Both Portland area artists and the public could benefit from a laboratory situation, where artists can create and the public can respond to experimental projects which could be developed as, or inform thinking about, more permanent works in the future. The laboratory could allow artists to respond to non-traditional sites (alleys, bridges, river sites, transit system sites other than stations) and could give opportunities to artists who have not already established public art reputations or careers. In many cases, the works could be temporary and aimed at supporting experimental, low-risk research in pushing the boundaries of public art. The most successful might become permanent works.
- In a laboratory situation, artists might be encouraged to propose sites as well as to initiate dialogue about the places public art can occur. The laboratory might be designed as an ongoing open call

for proposals, or occur annually or semi-annually as an invitational event. It should be professionally juried, include artists from within and without the region, and be held in the context of a professionally managed public information and education program. It should be substantially funded, and should not be attempted on a shoestring, or without an educational component.

- The laboratory and other innovative initiatives could be funded from the FAR (Floor-Area Ratio) bonus pool (these are dollars which are contributed by developers to a fund which is not linked to site-specific pieces).

### Public Art and Private Developers/Donors

**Recommendation IX.6:**

More effective methods should be in place to encourage high quality art projects by private developers.

Through the FAR bonus program and the blank wall ordinance, developers can become significant players in public art in Portland. To date the results of these programs have been quite tentative as there have been no projects reflective of new and improved guidelines. There is a distinctly added-on and incidental quality to the project that has been approved; it seems decorative and insubstantial. This may reflect what seems to be a very slight understanding of art and what artists do and the potential of art to confer a public dimension, on the part of the development community. It may also stem from underlying thinking, especially of the blank wall ordinance, which sees art as a remedial band-aid applied to an unsolved problem, rather than a desired end in itself. Under such circumstances, the pressure to solve the problem will most often crowd out the potential for art, which requires a certain autonomy.

Nevertheless, a positive dialogue has been established between MAC and the private sector, and the development community seems to have a generally receptive attitude toward public art. MAC needs now to extend this dialogue, and take a stronger educative and advocacy role. Developers need to be brought to a better understanding of the work of artists and become more familiar with recent public art in the private sector nationally, to

open up their thinking about the potential of working with artists. MAC can then challenge developers to be more ambitious in their public art.

Among specific strategies to encourage better projects are the following:

- MAC should continue to encourage the *early* involvement of artists in the planning of these projects, and a more thoughtful and innovative exploration of art as an integral aspect of the project conceptually.
- As part of the proposed educational program discussed under recommendation IX.4, workshops should be designed for developers on public art in private development.
- Developers' plans for art must be reviewed by MAC carefully and early in the planning process. The full amount of the art obligation for a citywide pool should be contributed to the FAR bonus pool if an acceptable plan and choice of artist is not advanced by the developer.
- Developers should be encouraged to exercise an option other than public art to gain the desired FAR increase where funds are not adequate to make an impact or the site does not represent an important opportunity.

**Private developers and public sites:** There is currently no clearly established review process for private developers who wish to commission works of art for a *public* site and the results have demonstrated that this can cause problems. The poor relationship of the piece commissioned by the Rouse Company to its surroundings is testimony to the fragmented and uncertain nature of that decision-making process. Developers could add much to the public street were there means to effectively guide the planning process. MAC needs to work with City agencies to develop a flexible view of regulations and policies governing the streetscape which directly impact the siting of public art.

The first step is to develop a streamlined review process for privately funded art in a public site, which clarifies the role of MAC and other City agencies. MAC needs to take a strong advocacy role by assisting developers (and other would-be donors) to plan good projects, helping to clarify City policy and the administrative review process. MAC should be seen as the review body for public art, whether it is commissioned or donated, and the Public Art Advisory Committee (PAAC) should have a strong role in the

review process. Given an overlap in membership between the City's Design Commission and PAAC, the roles of the two vis-a-vis public art and public sites could be clarified and a review process established which is collaborative and seeks to integrate review by other agencies involved.

## The Collection and Collection Management

### The Public Art Collection

#### **Recommendation IX.7:**

Portland should develop a clear statement of purpose for its public art collection with standards and criteria to guide acquisition, screening for the collection, and deaccessioning. It should also develop a system for evaluating individual projects or the collection as a whole.

In general, and this is not unusual, Portland's public art collection is something of a hodge-podge. Like Topsy it has often "just grown." While much of the work has been specifically commissioned or purchased, a considerable amount of work has come into the collection without being selected. It is an aggregation rather than a collection, lacking the kind of coherence and depth which normally characterize a collection. No overall purpose has been established. As a result, perceptions of its purpose often conflict, and are not shared consistently among members of the commission, artists, and members of the public.

Questions abound as to the meaning and purpose of the public art collection and what it should represent to the community.

- Is the collection a reflection of recent western art as seen through the filter of the cultural majority in Portland and the surrounding region?
- Should the geographic and cultural horizon be broader, encompassing the pluralism which characterizes the art of our time?
- What should it offer artists in the community besides an opportunity for commissions?
- What should it offer citizens?



- Should it provide access to new ideas? Should it be about expanding people's understanding of contemporary art?
- Should the collection stimulate dialogue, educate people?

By intention or default, any body of public art offers a working definition of public art to the community. Currently, Portland's collection represents a fairly narrow range of contemporary art. It does not achieve the level of distinction which would bring it national visibility. It includes little work which exemplifies the important critical issues of mainstream contemporary art, little which reflects the cultural diversity of the region, and it offers a limited view even of regional art.

Finally, there is no ongoing process for evaluating individual projects or the collection as a whole, and MAC should develop one. This should include answering questions about the purposes of the collection and setting goals and standards for it. Given the enormous wealth of expertise currently available in the public art field, Portland might consider establishing a "visiting committee," a rotating committee of out-of-area artists, arts professionals and public art administrators to periodically meet to provide some perspective on the collection and program direction, and assist the Public Art Advisory Committee in its evaluation process.

**Portable Works:** The collection includes a considerable amount of "portable" material (gallery-scale objects in various media), which is available on loan to public agency staff. Some of these works were done by artists employed through the CETA program, without curatorial selection of individual works. Much of it is mediocre. Even so, there is an ongoing demand for loan of these works, and it is clear that this aspect of the collection buys considerable good will among City employees.

MAC has recently established a deaccessioning procedure, to allow for removal of works from the collection in an orderly and considered way. While extensive deaccession of works by living artists on the basis of quality will be problematic, MAC should consider this, and should not hesitate to deaccession aggressively for conservation reasons. The programs' resources are stretched too thin for significant conservation efforts to be expended on this aspect of the collection.

It is good to keep in mind that extensive deaccessioning of work by living artists can affect reputations and market prices, and generate considerable ill will if it is not handled in an extremely professional and deliberate manner.

While the program should not shrink from this where it is warranted, removal of works from the collection should not be substituted for a thoughtful acquisition policy. Here, standards for acquisition should be raised, and a screening process should be established for all proposed additions to the collection, including such aggregations as those produced by CETA and other programs sponsored by the City, the County, or other jurisdictions.

**The Visual Chronicle:** "The Visual Chronicle" is a specific acquisition program which is intended to chronicle the life and history of Portland. Here, the focus of the collection is clear. The Visual Chronicle is defined by a narrow documentary point of view and the work that has been acquired is of limited interest from an artistic standpoint. Purchase amounts have been very small (as low as \$500 to \$1,000), and these amounts do not allow for the purchase of significant works.

In developing new policy for The Visual Chronicle, the restriction to representational work should be relaxed and there should be a broader view of the documentary aspect of the collection. It could be designated a regional collection, with the expressed purpose of documenting the variety of responses of artists to Portland and the region over time, without it being limited to such a narrow segment of contemporary art practice.

At the same time, purchase amounts can be increased and standards for acquisitions can be raised. Works might be acquired by commission. Each year, one (or a very few) commissions could be awarded so that inclusion in the collection would bring both substantial financial reward and artistic recognition, on the order of a civic fellowship.

**Recommendation IX.8:**

In planning for permanent, commissioned public art works, works of art should be given a position of parity with architecture and design in the overall planning of the urban landscape.

In Portland, many of the public art works readily visible on the downtown streets bear little relation to their surroundings. Large-scale works, which should be accorded their own territory, are frequently trivialized by a surrounding welter of light standards, planters, street seating, kiosks, banner stanchions, and so on. The Justice Center and the Convention Center offer

extensive programs of artworks commissioned for the buildings' public spaces, and these are for the most part more successfully integrated, albeit subservient to the program of architectural decoration. The figure of "Portlandia" caps the porch of the Portland Building in her appointed role, though she is clearly a decorative appendage to an important building. Clearly, "Portlandia" is a public art project which had merit on many other grounds; but this does not change the fact that it characterizes a particular approach to the issue of siting.

All too often, public works of art in Portland become submerged in a larger architectural or urban design program, rather than establishing an importance of their own in the public environment. If Portland wants to achieve a continuing leadership position in public art nationally, the public art program should move beyond commissioning works that are subservient to the buildings or the spaces where they are placed. This could be accomplished through earlier involvement of artists in the design of public sites and support by MAC of a stronger role for artists in the planning and design of public art projects (cf. recommendation IX.9), as well as the adoption of a formal policy of recognizing art to be as important as the architecture or design of the site.

One point should be noted in connection with the program's growing emphasis on work which is more carefully integrated with site. As the program continues to commission work, a policy needs to be developed for how to deal with site-specific works when their surroundings change.

**Recommendation IX.9:**

In order to raise the standards of permanent commissioned works, the public art program should incorporate a stronger voice for artists in determining what role art will play in a civic project, raise commission levels to artists, and develop a more professional selection process.

The range of approaches to public art in the Portland area does not include some of the most widely accepted alternatives to the traditional architectural commission, including the design team approach. This approach, where the art program or concept for the work is developed by the artist in dialogue with the design process rather than predetermined by the selection panel or architect, has been highly successful when the artist enters the process at the

outset. It is also an important opportunity for artists to gain knowledge, experience, and confidence with architectural projects. Collaboration embraces a wide variety of approaches tailored to specific situations, but aims to foster a dialogue between architect and artist based on professional parity. This approach has redefined recent public art and opened new possibilities as artists have entered the dialogue and considerably expanded thinking about what constitutes a public site and public art. In Portland, many artists don't feel part of the dialogue which shapes public art.

There is another problem in the development of a nationally-recognized public art program. Commission amounts for Portland's programs have been relatively small and have not kept pace with increasing costs to artists. This situation does not allow for commissions at the level of really major works, and keeps Portland from competing nationally for artists. Until the Convention Center, there have been virtually no significant works commissioned from artists from out of region. The Convention Center establishes a new range of possibilities, and shows the benefits of more realistic commission amounts.

The third key element in raising standards will be the increased professionalization of the art selection process. A regular system of *ad hoc* panels, which are small and made up primarily of art professionals, has proven to be a crucial component to making informed decisions about the selection of artists for public commissions. The regular inclusion of experienced, expert panelists from out of the area will bring a broader critical perspective to the City's public art, and will help to introduce new ideas for both process and artists.

In summary, the most important changes which will bear on the quality of commissioned works are as follows:

- increasing commission amounts to nationally competitive levels
- structuring projects to increase the artist's role in the definition of the art project, and developing a parity position for the artist vis-a-vis architects, planners, and policy-makers in the process
- scheduling artist selection to bring the artist in to the site/project design process at the outset where appropriate
- establishing a professional artist selection process.

Collection Management

**Recommendation IX.10:**

A new approach to public art conservation should be developed which includes more complete planning, registration, condition monitoring, and more realistic budgeting.

MAC is responsible not only for the works which it has commissioned and purchased but a considerable amount of work which it has received en bloc (CETA), or been given responsibility for (FAR bonus projects in the public right of way). In other cases, responsibility for long-term care is not clearly established.

Current legislation has established a set-aside of art funds for conservation coming from the additional .33%. Staff in the public art program attempt to set aside 5% of the 1% for art for maintenance of a work, when the City bureau providing the funds allows. This goes into a maintenance fund in the Public Art Trust Fund. This fund is currently very small and the percentage calculation bears no relation to any estimate of the real need, which is largely unknown at present.

Currently the commission has a very limited collection management function in place. There is a part-time preparator on contract, who works mostly with the Portable Works and Visual Chronicle collections. The contractor's skills are directed towards archival storage, preparation and display of works on paper and gallery-scaled objects, and keeping track of inventory.

The Visual Chronicle is stored in the Portland Building in a marginally climate-controlled situation. It is secure, archivally matted and framed. There is a catalog of this collection. Part of it goes on display each year in the mayor's office and in other locations. There is a computer inventory and location file of the Portable Works Collection in the commission office. These works are loaned out to governmental offices on request.

There is not a baseline condition report on all objects in the public art collection. Some works have been surveyed and condition reports done in the past, mostly in reaction to severe problems. There is very little information available on the condition of permanently sited works and the special

needs of large-scale work in public places are not being addressed. There is no local institution which is qualified or able to provide these services.

Portland's collection is at the point, in terms of age and number of works, where to ignore the responsibility for its conservation any longer is to invite major expense and public embarrassment. As conservation needs, particularly with the larger objects, go undetected and/or untreated and professional maintenance procedures are not being systematically implemented, problems can develop to the point of major expense, risk to the integrity of the work, legal action by the artist, and other undesirable outcomes. This is unnecessary and can be avoided by proactive professional collection management.

Specific strategies to implement collection management are recommended as follows:

- Contract with a qualified professional conservator to provide a complete condition survey of the collection. This will establish a baseline against which to subsequently measure the changing condition of each work. The survey should also identify problems and suggested treatment of each work, recommend priorities, and provide cost estimates.
- Establish a professional registration and location control system for the entire collection.
- Develop a long-term conservation plan, including:
  - complete data on the materials and fabrication of each work
  - routine procedures for the ongoing care and monitoring of each work
  - special remedial conservation and restoration actions for problems identified
  - a budget and time frame.
- Establish a more realistically scaled fund for conservation either by augmenting the .5% set-aside or establishing a supplemental source for funding conservation which reflects actual need as established by the conservation plan. Since this can be expected to fluctuate, it should be a flexible source, such as the PATF.
- As each new work comes under MAC's purview, it should be fully and professionally documented and condition reported, and a conservation plan and budget established for it.

In this connection, it is well to bear in mind that the Portland Art Museum operates an Art Conservation Laboratory which possesses in-house expertise, experience, and equipment. Thus, it seems likely that a cost effective solution to conservation and collections care guidance will be to contract with local professionals when appropriate.

## *Administration and the Role of Committees*

### *Program Administration and Staffing*

#### **Recommendation IX.11**

MAC should add staff in the public art area and charge agencies their fair share for program management to cover these increased costs.

Most public art programs have started out with the view that staffing needs will be minimal, based usually on a prediction of staff responsibilities untempered by experience. With experience, unforeseen needs are recognized and must be met later in the program's life. Portland's public art program has, as is fairly typical, gone through its early years with an extremely lean staff, depending heavily on the participation of citizen volunteers. This has been possible up until now because the number of projects has remained fairly manageable, and because certain areas, such as conservation, education, and long-term planning, have been largely deferred.

Currently the pressures on staff time make effective project planning difficult, and don't allow for comprehensive program planning. Under the circumstances, it is hard for staff to spend enough time with agencies far enough in advance to get artists involved earlier, and to explore roles for artists which require artist selection early in the project design. If the number of active projects continues to escalate as more agencies come under MAC's public art umbrella, the problem will only worsen.

Critical to the success of any public art program is the role of staff in the management of individual projects: facilitating the artists' work (especially that of inexperienced artists), and taking an advocacy role for the project in the larger governmental environment. Equally important is project planning, which can involve considerable educational and diplomatic work

within the public bureaucracy. Overall program planning is critical to developing a coherent overview and targeting resources effectively. Public art programs must also provide effective education, collection management, and public information functions.

MAC's heavy reliance on citizen participation has led not only to public perceptions of cronyism, but also to over-involvement of PAAC and selection committees in the implementation of projects. This continuing involvement is time consuming committee-work, which must be staffed. In the end, it creates a significant administrative burden, and is probably not the most efficient use of staff or community resources.

Community outreach is going to be a greater need as agencies with far-flung capital programs, such as Parks and Recreation, become part of the public art program. There will likely be more projects in neighborhoods, requiring a different kind of staff outreach and liaison with community interests. As with developers and within the governmental agencies, MAC needs to be able to educate community people, open up their thinking, and provide advocacy and support for artists in community settings.

The administrative budget for public art is difficult to isolate, subsumed as it is in large part by the larger MAC administrative structure. Support staff are largely lacking throughout the commission, and travel is woefully inadequate. (The public art coordinator should be able to travel and learn about public art elsewhere first-hand, and this is hardly feasible under the current budget.) Nor are funds available to put the artist selection process on a professional rather than a volunteer basis, and to bring in outside consultants. The preparator's rate of compensation is extremely low, and it would probably be difficult to refill the job with a qualified person at a similar rate. The .33% allocation for public art program administration does not cover current staff salaries, let alone meet the other needs for which it is earmarked.

At the same time, MAC is providing a range of services, from project planning and administration to public information, interpretation, and collection management, to agencies and jurisdictions participating in the public art program. Currently, all those participating are not paying their share for the services they are getting from MAC.

While a disinclination in local government to spend administrative funds was noted by more than one person, it is clear that MAC's ability to effec-



tively plan and manage a comprehensive and integrated public art program, let alone to contemplate expansion, is contingent on adequate staffing.

There are several strategies to address the challenges in administration:

- MAC should allocate funds for an additional full-time staff person to manage projects for the public art program, for clerical support and staff travel, and for professional contract services to provide collection management services, educational programming, and effective public information.
- MAC should budget for a paid professional selection process and more flexibility in the use of consultants. Artist selection costs should be considered a legitimate project cost, and be borne by the 1% allocation.
- Better use should be made of the Public Art Trust Fund to consolidate funds and limit the number of art projects to a manageable level. In addition to making better use of staff resources, this strategy will help ensure that art funds are not spread too thin, and that priority projects receive adequate funds for significant works.
- Ongoing administrative service contracts with METRO and all other agencies for which MAC provides planning, administration, and other services, should be based on actual costs rather than an arbitrary percentage.

*The Role of the Public Art Advisory Committee  
and the Selection Committees*

**Recommendation IX.12:**

A restructured Public Art Advisory Committee should play a greater role in policy, planning, and decision-making. Efforts should be made to reduce the appearance that PAAC and the selection committees are controlled by a small group of people and additional outside, paid expertise should be sought.

The Public Art Advisory Committee (PAAC): PAAC has been established to guide MAC in its conduct of public art programs. PAAC has been relied upon considerably in the development of public art program policy

and procedures and MAC has benefitted from this advice. Yet PAAC's advisory status leaves the Commission free to ignore its recommendations, especially where there are competing political interests. For example, in the area of reviewing community-initiated proposals for public art projects, where PAAC could play an effective role guiding donors, it has been overruled by the Commission. PAAC likewise has an ambiguous role with regard to the review of proposals made to the City by developers.

It has been suggested that as public art develops regionally, PAAC be restructured into a policy and planning group with a regional focus (cf. recommendation IX.2). Restructuring should bring additional expertise and broad perspectives to the new group and, as a consequence, it should be given a stronger role which recognizes and takes advantage of the members' special knowledge in the visual arts and public art. The group's guidance and review of proposals initiated by donors and private developers should be taken seriously. Perhaps greater participation by MAC Commissioners, without diluting the expertise of the group, would give greater weight to its recommendations before the Commission.

**Selection committees:** Selection committees have developed a highly activist role in the MAC's programs. In addition to artist selection, they have extensive input into defining the artist's role and the nature of the commission, and continue to take an advocacy role for the public art project vis-a-vis the client agency as the project is implemented.

One problem with the current structure is that selection committees tend to draw from a small pool of people (owing perhaps partly to the extent of the uncompensated time commitment). The tendency in Portland is for a small, self-selecting group to be involved over and over again on selection committees and this reinforces a perception in the visual arts community that decisions about public art in Portland are made by a small clique, and that the process is closed. This impression is encouraged by the fact that over the program's history, multiple commissions have gone to certain artists, many of whom have also served as panelists and/or members of PAAC. This reinforces perceptions of a conflict of interest. Certainly eliminating repeat service for members of PAAC or the selection committees would be helpful.

Long-term volunteer service may play some role in limiting the number of people who are willing or able to serve on committees (as an example, the Convention Center selection committee worked for several years on a volun-

teer basis). If selection committee service is put on a paid consultant basis, this will encourage wider participation by professionals and others whose work obligations preclude long-term volunteer service and will broaden the expertise available to the program.

Selection committees have also tended to be large and inclusive, representing a variety of interests. The result is that visual arts expertise, while represented, can be seriously outweighed by architects, community representatives and the client. While much has been made of the value of consensus in selecting artists, the results have all too often proved uninspiring. The consultants advocate:

- mixing local and out-of-town members on selection panels (this would bring valuable experience to a project and much-needed perspective to the collection overall)
- making selection panels smaller with an increased percentage of arts professionals: artists, contemporary critics, educators, art historians with broad knowledge of contemporary art, knowledgeable contemporary collectors.

The recent Convention Center project established a powerful and persuasive new model in this regard. For the first time, outside advisers were brought in for the benefit of their experience and perspective to help plan a project. This fresh perspective helped MAC structure a thoughtful array of architectural commissions, many of them major opportunities with significant commission amounts. Portland and the surrounding region which cooperated on the project competed successfully for national, regional and local artists.

Finally, MAC may want to develop stricter conflict-of-interest rules both for PAAC and the selection committees. Many programs, including the federal government's Art-in-Architecture Program, limit an artist to one major commission. In most cases, sitting members of an arts commission or subcommittee which makes artist selections are ineligible to receive commissions for the duration of their service. Selection panelists are usually ineligible for the project which they are adjudicating, but eligible for all others. In Portland's case, where selection panels are so deeply involved in projects for so long a time, it might be more appropriate to treat panelists as members of a commission subcommittee, and extend ineligibility to all projects during the period of service.

## Part X

# Next Steps and Timeline

The initial four major steps in the Portland region's community cultural planning process were completed with the delivery of this report. Those steps included:

- an extensive pre-planning process conducted by the Steering Committee of Arts Plan 2000+ leading up to the selection of The Wolf Organization, Inc. as consultants to the project in October, 1990
- extensive fact-finding and research conducted by the consultants together with work by Task Forces and other citizen groups
- preparation of the consultants' report
- acceptance of the consultants' report by the Steering Committee.

Subsequent steps will include:

- a process through which the community can review, and if necessary, revise or alter the consultants' report and add relevant detail to develop the community's cultural plan
- the development of final timelines and budgets
- adoption of the plan by Arts Plan 2000+
- approval of the community plan by the appropriate bodies
- continuing implementation of the plan.

The planning process has involved and will continue to involve a mix of community input and comment on the one hand and research and expert

evaluation by professional consultants on the other. Once the consultants' work is completed, it will be up to the Steering Committee of Arts Plan 2000+ to carry forward the process to assure that the final product reflects adequate public input as well as sound data from which strategies are put forward.

**Recommendation X.1:**

The Steering Committee should review the changes made in the preliminary version of this report to make sure they incorporate community concerns.

The Steering Committee met in an extended working session with Dr. Thomas Wolf, President of The Wolf Organization, Inc., in late June to review the preliminary report. The purpose of that meeting was fourfold:

- to review the draft of the report
- to identify areas where consensus on various recommendations existed as well as areas where more discussion was required to reach consensus
- to accept the report with any minor changes noted
- to discuss initial steps towards implementation.

The approach used to structure this working session was a "consent calendar," a device used by a group to identify areas of consensus. Along with a copy of the preliminary report, Steering Committee members received a sheet listing each recommendation by number. For each recommendation, they indicated whether they agreed, disagreed, or wished to discuss it further. A 60% agree rate was considered sufficient to place a recommendation on the "consent calendar" and, at the beginning of the meeting, the Steering Committee voted to accept those recommendations that were on the "consent calendar."

The Committee understood that "acceptance" of any recommendation did *not* imply complete agreement with each detail of the text. Rather, acceptance meant that the report would serve as the conceptual framework for subsequent discussions about cultural issues in the region. Thus, while some committee members may have disagreed with details of a particular recommendation, they did agree with the general feeling that the philosophical un-

derpinnings and basic thrust was reflective of the Steering Committee's consensus vision for cultural life in Portland and the region.

The results of the Steering Committee's deliberation were as follows:

- All recommendations except for nine received at least a 60% "agree" vote and were accepted at the beginning of the meeting. Those that were not on the "consent calendar" were: III.8, III.9, III.10, IV.8, IV.10, VI.2, VI.7, VII.8 and IX.12.
- No recommendation received higher than a 30% disagree rate. The highest disagree was IV.10 at 30%; the next highest was III.8 at 20%.
- Because of the low disagree rate, there was general consensus that all recommendations met the minimum requirements for acceptance of the report.
- Further discussion of the nine recommendations not on the "consent calendar" led to revisions in this final version of the report.

In addition to the Steering Committee meeting, the consultant met with a number of other groups both in Portland and in the region. Based on their reactions to the report, other changes have been made to correct errors and reflect community concerns.

This final report is in substance very similar to the preliminary report. However, it is important that the Steering Committee review it carefully to be sure it reflects their understanding of the modifications agreed to in June.

**Recommendation X.2:**

The Steering Committee should spearhead the completion of the planning process using specially convened *ad hoc* sub-committees to address specific topics.

Because of the detail and complexity of the consultants' report, it will be critical to begin a review process as soon as possible now that the final version of the report is available. The consultants recommend that *ad hoc* sub-committees of the Steering Committee (including non-members when deemed appropriate) be used to examine specific areas and work out the details of the consultants' recommendations.

Based on the consultants' experience with the task force process during the past year, several suggestions seem appropriate:

- The topics around which these sub-committees are convened must be carefully targeted to address specific questions of implementation strategy, priority setting, financial implications, or scheduling. As an example, a sub-committee might be assigned to work out the details concerning the specific working relationships that need to be forged between local governments, local arts councils, METRO, and the new Regional Arts Council.
- Each sub-committee should be appointed by the Chair of the Steering Committee and should meet no more than three times to address its focused agenda.
- While sub-committees should be kept small, their meetings should be open and well-publicized.
- Each sub-committee should compile a report of its recommendations which will be forwarded to the Executive Committee of the Steering Committee.
- As part of its charge, each sub-committee should be given a specific due date for reporting to the Executive Committee. Care should be exercised to allow for a schedule that provides for a staggered system for review of reports by the Executive Committee, if necessary.

The make-up of these sub-committees will be critical to the success of this phase of implementation. Therefore, individuals with specific expertise must be identified. At the same time, it will be important to continue to involve those people who were active in the Arts Plan 2000+ process. Task force members who wish to continue should be appointed, if possible, to sub-committees so that there is some continuity.

While the format of each *ad hoc* sub-committee may vary depending on the specific section of the report or issue to be addressed, the consultants provide the following as examples of the type of questions these sub-committees should consider:

- Should this recommendation or suggestion be implemented? Should it be altered? Should it be eliminated?
- If it is to be implemented, what is its priority (relative to other recommendations under consideration by this group)?

- What are the immediate and longer-term steps required for implementation? What are the approximate costs of these steps?
- What benchmarks might be established to determine whether the recommendation is being implemented?
- What methods of evaluation might be employed to assess whether the recommendation is accomplishing its purpose?

This process should begin immediately and the consultants expect that it will conclude ideally by early November, 1991 but in any case no later than the end of the year.

Although the original mandate of the Steering Committee was to serve through October, 1991, it will be necessary to extend this service to the end of 1991. Since the planning process began with, and has been implemented by, the structures created by Arts Plan 2000+, it is important that the Steering Committee, the Executive Committee, and the current Chair of Arts Plan 2000+ see the process through to the development and adoption of the community cultural plan. The planning has gone on for quite some time but the process should not be rushed to meet an unrealistic completion date.

**Recommendation X.3:**

Arts Plan 2000+ should develop an advocacy strategy in order to move toward acceptance of the plan by the community and implementation of its final recommendations.

Even though *ad hoc* sub-committees may be required to work on refining the cultural plan, the overall shape of the recommendations are likely to provide enough information and areas of agreement to begin the process of communicating with key constituencies, elected officials, and the general public. The initial step in this process is to develop a comprehensive strategy that can allow sufficient time to address all of the aspects of the final community plan. This will mean coordination of informational and advocacy activities on behalf of the plan and, initially, should include various components:



- The consultants' final report should be distributed to the Steering Committee, task force members, artists, arts organization staff and board members, and others in the arts community.
- Initial informational meetings should be held throughout the region with representatives of:
  - government, including both staff and elected officials
  - local arts groups, organizations, and agencies
  - private and public sector funders
  - the business community, in particular representatives of the tourism, entertainment, and sports industries
  - ethnic and racial minorities
  - school boards and educators.

The purpose of these meetings is to provide information on the thrust of Arts Plan 2000+ as well as assure continued active involvement by these sectors in the planning process. At least some of these meetings might be scheduled to coincide with Dr. Wolf's visit to Portland beginning on September 25, 1991.

- It will also be critical for a sub-committee of the Steering Committee to begin the process of discussions with elected officials and others in various local jurisdictions to determine which ones will be responsible for carrying out particular aspects of the final plan.
- Specific written material should be developed including:
  - a brochure which gives a concise summary of the highlights of Arts Plan 2000+
  - specific position and background papers which describe the impact of certain recommendations on particular segments of the public (for example, "How will a regional arts agency assist Beaverton?" or "Why should artists support Arts Plan 2000+?" or "How enhanced support for the arts will benefit business")
  - general summaries of the consultants' report, for distribution to interested individuals.

- In addition, a fully-fleshed out and staffed media and promotion campaign should be developed. The purpose of this campaign is to coordinate the information dissemination process so that there is some overall control and coordination of the Arts Plan 2000+ "story."

It is important to keep in mind that the public news-worthy moments of Arts Plan 2000+ are comparatively few and must be carefully exploited. Among the more important ones are the following:

- the kick-off of the public comment period
- Dr. Wolf's appearance in late September
- the "adoption" of the community plan by the end of the year
- the "passing of the baton" of Arts Plan 2000+ (shortly after the plan has been adopted) to the various agencies and organizations which will play some role in its implementation
- the convening of representatives of various government jurisdictions and other agencies (School Board, POVA, etc.) to discuss their role in implementing the community cultural plan.

**Recommendation X.4:**

Unless the final version of the plan suggests otherwise, after January, 1992, all aspects of the cultural planning process should be overseen and coordinated by the reconstituted Metropolitan Arts Commission and METRO.

The activities outlined in the previous recommendation address only the initial step of implementation and it is logical for Arts Plan 2000+ to oversee that step. Having established the planning structure and assembled the community resources, Arts Plan 2000+'s role in developing the final community plan is clear.

However, the consultants believe that implementation of the cultural plan will be on-going over the next several years. While many organizations and agencies will be involved in implementation, two will have particular responsibility for coordination and oversight — the new Regional Arts Council/reconstituted MAC and METRO. MAC has a proven track record in

planning, and has been able to be an effective advocate and fund raiser for planning activities. Furthermore, one of its roles over the next several years will be ongoing cultural planning for the region (cf. recommendation III.9). METRO has an obvious connection to the region, and its role in implementing the political and financial aspects of the plan has been clearly explained (cf. recommendation III.8).

It is important to keep in mind that this plan requires substantial changes to the Metropolitan Arts Commission and these changes are likely to have a significant impact on all aspects of MAC's governance and operation. Therefore it will be important for MAC to undergo an extensive and timely organizational review and planning process in order to meet the timetable suggested. In addition, it is at least possible that the final version of the plan will recommend other agencies to assume partial responsibility for the implementation of the planning process. Like all other aspects of the plan, the consultants cannot mandate specific actions to be taken nor can they predict what will occur after the final consultants' report is reviewed by the community.

**Recommendation X.5:**

Efforts should be made to expand the cultural planning process to include Clark County.

During the early stages of Arts Plan 2000+ in 1990, a decision was reached to define the geographic area covered by the plan to include Multnomah, Clackamas, and Washington Counties. As the planning process moved forward, a high level of interest was evinced by public officials and arts administrators in Clark County and particularly in its largest city, Vancouver. Representatives of Clark County requested that the consultants meet with elected officials, representatives of the arts community, and others to recommend ways that the County might be included in the Arts Plan 2000+ process.

Given the stage of the research and logistics of the planning process at the time the request was made, it was not possible to include Clark County as a full participant. However, the notion of a regional cultural plan that includes the City of Vancouver and Clark County is very appealing, particularly since the focus of the plan will be regional and there appears to be

a good deal of interest from key players both in Clark County and the Portland region.

It is obvious that Clark County is an integral part of the region and that the arts scene in the Portland region includes individuals, organizations, and activities that are based there. The cultural interchange between the Tri-County region and Clark County is substantial and it works in both directions. For example, some fifteen percent of the Oregon Symphony's subscribers live in southeastern Washington, primarily in Clark County, traveling to Portland for concerts. Conversely, the excellent theatre facility at the Columbia Arts Center in Vancouver is routinely rented by Portland groups wishing to take advantage of one of the few 300-seat facilities in the region.

Vancouver's support for the arts is substantial. The City has contributed over \$600,000 to the capital costs of the Columbia Arts Center. Both the City and the County contribute 16 percent of the operating budget of the Center as well. Other organizations, including the Tears of Joy Puppetry Center (currently in its twentieth year), are also supported through public funds and a base of private contributions. Just recently, the City agreed to lease for \$1 a year a building on the newly renovated Officer's Row to a group which is establishing a folk arts center.

The possibilities for cooperation between the Tri-County region and Clark County are impressive. For Portland organizations, opportunities exist for audience development activities; for the City of Vancouver and Clark County, opportunities for professional development and technical assistance for artists and arts organizations' staff should be considered.

The consultants recommend that a sub-committee of the Steering Committee meet with representatives of Clark County (appointed jointly by City and County) to establish an official connection and working relationship with Arts Plan 2000+. If it is possible to make formal this relationship in a timely manner, all task force assignments should be made from the new, four-county region.

### *Timeline for implementation*

The consultants provide the following timeline in order to clarify the key tasks that must be performed during the next eighteen months.

August 1 - September 3, 1991

During the summer months, the consultants' report should be disseminated throughout the community, particularly to those individuals who were interviewed or served on task forces. Because the report is so extensive, it may be appropriate to have copies available at certain locations and send out only the executive summary and recommendations.

In addition, the following tasks should be undertaken to begin the community planning phase which follows:

- make final the structure for refining and developing the cultural plan and select individuals for specific assignments
- develop promotional material (including a slogan, logotype, and other graphic materials) as well as brochures and other vehicles to summarize the consultants' report for distribution during the fall
- create a "speakers bureau" of individuals knowledgeable in the community planning process
- begin an organized process of contacting community leadership to develop support for the working document and the on-going planning process to be activated during the fall
- develop a list of specific groups that should have input into the community cultural plan and target individuals to assure that the process begins
- design the fall "kick-off" event for the community campaign (this might include a nationally prominent figure to address a "cultural congress" or other gathering of community leaders to discuss the cultural plan)
- begin planning for the end of year event to highlight "adoption" of the community cultural plan or the event for the "passing of the baton."

September 3, 1991 - December 31, 1991

During the fall and early winter, the widest possible review of the consultants' report should be conducted. The purpose of this phase is to assure that the recommendations of the consultants have been reviewed, revised, and accepted by the community so that the plan can be adopted by the end of the year and implementation can begin.

Among the specific tasks that must be undertaken during this period are the following:

- hold meetings of special sub-committees to review the specific assigned pieces of the consultants' report, as needed
- hold meetings of the Executive Committee of the Steering Committee to oversee the process
- conduct a media campaign, distribute promotional and informational materials, and conduct a fall "kick off" event
- address as many civic or governmental groups as possible, using representatives of the Steering Committee (and others from the speakers bureau), to provide an overview of the planning process and gather input and support for it
- continue planning and ultimately produce the event to highlight the acceptance of the community cultural plan by the end of the year.

January 2, 1992 and on

During this phase, the implementation process will be taken over by the reconstituted MAC/Regional Arts Council and METRO. Specific sections of the community plan should be officially submitted to those organizations and entities which must deal with implementation (for example, Portland City Council, local municipalities and county commissions, school boards, local arts agencies, tourism and economic development agencies, etc.). During this phase, implementation of key recommendations should begin. In addition, support and endorsements from civic organizations and other groups should be cultivated. If there are any initiatives in the community plan that require a vote of the electorate, implementation of the campaign must begin during this phase as well.

## *Appendices*

## Appendix A List of Participants

The consultants have interviewed, either individually or in small groups, the following individuals. They would like to express their appreciation for the time these people devoted to this process. Please note that titles, listed for purposes of identification only, were current as of the date of the interview.

<i>Carl Abbott</i>	Professor of Urban Studies and Planning, Portland State University
<i>Susan Addy</i>	Executive Director, Northwest Service Center
<i>Charles Ahlers</i>	Executive Director, Portland Oregon Visitors Association
<i>Jeff Alden</i>	Attorney, Stoel Rives Boley Jones & Grey
<i>Alan Alexander III</i>	Staff Assistant, Metropolitan Arts Commission
<i>Art Alexander</i>	Executive Assistant to Commissioner Lindberg
<i>Bruce Allen</i>	Project Manager, Portland Development Commission
<i>Mark Anderson</i>	Chair, Arts and Culture Standing Committee, City Club of Portland
<i>Richard Ares</i>	Commissioner, Metropolitan Exposition — Recreation Commission



---

<i>Mary Arnstad</i>	General Manager, The Heathman Hotel
<i>Joyce Ashmanskas</i>	Founding Member, Beaverton Arts Commission
<i>Robert Bailey</i>	General Director, Portland Opera
<i>Amanda Baines Ashley</i>	Consultant, Public Relations, Media, and Publicity
<i>Rebecca Banyas</i>	Arts Plan 2000+ Newsletter Editor
<i>Susan Banyas</i>	Artist
<i>Steve Bauer</i>	Director, Office of Finance and Administration, City of Portland
<i>Mary Becht</i>	Executive Director, Broward (FL) Cultural Affairs Council
<i>Candace Beck</i>	Principal, Buckman Elementary School
<i>Doug Benson</i>	Architect; Former President and Festival Chair, ArtQuake
<i>Ken Berry</i>	Educator, World Arts Foundation
<i>Howie Bierbaum</i>	Executive Director, Portland Area Theatre Alliance
<i>Dennis Bigelow</i>	Producer, Oregon Shakespeare Festival, Portland
<i>Earl Blumenauer</i>	Portland City Commissioner
<i>Dick Bogle</i>	Portland City Commissioner
<i>Lyn Bonyhadi-Schleicher</i>	Director of Marketing, Will Vinton Productions
<i>Brian Booth</i>	Attorney, Tonkin Torp Galen Marmaduke & Booth
<i>Karen Brooks</i>	Arts and Entertainment Editor, <i>The Oregonian</i>
<i>Larry Brown</i>	Project Manager, Portland Development Commission

---

<i>Richard Brown</i>	Administrator, Oregon Repertory Singers
<i>Richard Brown</i>	Metropolitan Arts Commissioner; Photographer
<i>Robert Buckner</i>	Executive Director, Kansas City Chapter of Young Audiences
<i>Bill Bulick</i>	Executive Director, Metropolitan Arts Commission
<i>Marlow Burt</i>	President, Kentucky Center for the Arts, Louisville
<i>Sue Busby</i>	Executive Director, Interstate Firehouse Cultural Center
<i>C. Herald Campbell</i>	Steering Committee Member, Arts Plan 2000+
<i>Clifford Carlsen, Jr.</i>	Attorney, Miller Nash Wiener Hager & Carlsen
<i>Ed Carpenter</i>	Artist
<i>John Carroll</i>	Managing Director, Prendergast & Associates
<i>Judith Catterall</i>	Co-Director, Oregon Dance Consort
<i>Greg Chaille</i>	Executive Director, Oregon Community Foundation
<i>Judith Chambliss</i>	Project Director, Aging and the Arts: Access & Action
<i>Daniel P. Chernoff</i>	Attorney, Chernoff Vilhauer McClung & Stenzel
<i>Barbara Clark</i>	Auditor, City of Portland
<i>Faith Clover</i>	Arts Curriculum Coordinator, Educational Service District, Portland Public Schools
<i>Larry Cole</i>	Mayor of Beaverton
<i>Edwin Collier</i>	Associate Professor of Art, Pacific University
<i>Kathy Condon</i>	Executive Director, Columbia Arts Center

---

<i>Dennis Crow</i>	Superintendent, Sandy Union High School, District #2
<i>Rena Cusma</i>	Executive Officer, METRO
<i>Gayle Darr</i>	Founding member, Hillsboro Community Arts
<i>Tom DeJardin</i>	Councilor, METRO, Clackamas County Representative
<i>Frank Delia</i>	Vice President and General Counsel, Mentor Graphics
<i>Harry Demorest</i>	Chair, Portland Development Commission
<i>Niel DePonte</i>	Conductor, Oregon Ballet Theater
<i>James DePreist</i>	Music Director and Conductor, Oregon Symphony
<i>Eduardo Diaz</i>	Director, City of San Antonio (TX) Department of Arts & Cultural Affairs
<i>Jerri Doctor</i>	Executive Director, Beaverton Chamber of Commerce
<i>Michael Doherty</i>	Video Executive Producer, NIKE
<i>Donna Drummond</i>	Senior Financial Consultant, Merrill Lynch
<i>Mary Ann Duboff</i>	Paralegal, Cooney Moscoto & Crew
<i>Leonard Duboff</i>	Professor of Law, Lewis & Clark Law School; Attorney, Cooney Moscoto & Crew
<i>Glenda Durham</i>	Steering Committee Member, Arts Plan 2000+
<i>Carol Edelman</i>	Managing Partner, Edelman Naiman
<i>Andrew Edwards</i>	Executive Director, Lakewood Center for the Arts

---

<i>Charles Encell</i>	Director, Beaverton Chamber Symphony Orchestra
<i>Charles Farmer</i>	Executive Director, Community Music Center
<i>Patsy Feeman</i>	Design Consultant
<i>Lee Fehrenkamp</i>	General Manager, Metropolitan Exposition-Recreation Commission
<i>Bill Flood</i>	Director of Continuing Education, Portland State University
<i>Mary Vinton Folberg</i>	Program Director for Dance Department, Jefferson High School
<i>Sylvia Forbes</i>	Founding Member, Beaverton Arts Commission
<i>Bill Foster</i>	Executive Director, Northwest Film & Video Center
<i>Robert Frasca</i>	Partner, Zimmer Gunzel Frasca
<i>Robert Freedman</i>	Manager, Portland Center for the Performing Arts
<i>Merrie French</i>	Director, Valley Arts Association
<i>Don Frisbee</i>	Chairman, PacifiCorp
<i>Joseph Gallegos</i>	Director of Gerontology, University of Portland
<i>Mark Gardiner</i>	Managing Director, Public Financial Management, Inc.
<i>Robert Geddes</i>	Executive Vice President and Corporate Counsel, US Bancorp
<i>Theonie Gilmore</i>	Director, M.U.S.I.C.
<i>Randy Gragg</i>	Arts writer, <i>The Oregonian</i>
<i>Shelley Greenwood</i>	Executive Director, The Metropolitan Council, St. Paul, Minnesota

---

<i>Michael Grice</i>	Public Information Specialist, Department of Public Information, Portland Public Schools; Commissioner, Oregon Arts Commission
<i>Bruce Hagensen</i>	Mayor of Vancouver, Washington
<i>Judie Hammerstad</i>	Clackamas County Commissioner
<i>Pat Harrington</i>	Marketing Director, BOOR/A Architects
<i>Michael Harrison</i>	District Planning Manager, City of Portland Bureau of Planning
<i>Jo Havercamp</i>	City Councilor, City of Gresham
<i>Ned Hayes</i>	President, Mt. Richmond Forest
<i>Marilynn Helzerman</i>	Past President, Hillsboro Community Arts
<i>John Hemsath</i>	Director of Theater Operations, Playhouse Square Foundation, Cleveland (OH)
<i>Christine Henderson</i>	Artist; Arts critic for <i>Willamette Week</i> ; Chair, Art Literacy Program, Tigard-Tualatin Public Schools
<i>Bob Hicks</i>	Theatre Critic, <i>The Oregonian</i>
<i>Larry Hilderbrand</i>	Associate Editor, <i>The Oregonian</i>
<i>Shirley Huffman</i>	Mayor, City of Hillsboro
<i>Jose Jaime</i>	Program Coordinator, El Centro Cultural
<i>William Jamison</i>	Owner, Jamison-Thomas Gallery
<i>Jane Jarrett</i>	Marketing Director, Portland Center for the Performing Arts
<i>Carol T. Jeschke</i>	Acting Executive Director, Cultural Resources Council, Syracuse, New York

---

<i>David Johnson</i>	Assistant Director, Tucson/Pima Arts Council
<i>Sarah Johnson</i>	Executive Director, Young Audiences of Oregon
<i>Kathleen Johnson-Kuhn</i>	Assistant to Commissioner Lindberg
<i>Nate Jones</i>	Principal, Portland Public Schools
<i>Charles Jordan</i>	Director, Portland Bureau of Parks & Recreation
<i>Harriet Jorgenson</i>	Executive Director, Clackamas Arts Commission
<i>Gretchen Kafoury</i>	Portland City Commissioner
<i>Mel Katz</i>	Artist
<i>Dr. John Keyser</i>	President, Clackamas Community College
<i>Cindy Kiebitz</i>	Executive Director, Huntington (NY) Arts Council
<i>Larry Kirkland</i>	Artist
<i>Nancy Klementowski</i>	Playwright
<i>David Knowles</i>	Attorney; METRO Councilor
<i>Alyce Koehler</i>	Board Member, Oregon Shakespeare Theater
<i>Chris Kopca</i>	Project Manager, Portland Development Commission
<i>Michihiro Kosuge</i>	Artist; Committee Member, MAC Public Art Advisory Committee
<i>Bernd R. Kuehn</i>	Conductor, Washington County Chorale
<i>Phil La Fond</i>	President, I.A.T.S.E., Local #28
<i>Robin Lane</i>	Artistic Director, Echo Theater

---

<i>Doug Lauchlan</i>	General Manager, Calgary Center for the Performing Arts
<i>Kristin Law Calhoun</i>	Public Art Assistant, Metropolitan Arts Commission
<i>David Lawrence</i>	Economic Development Director, City of Hillsboro
<i>Sally Lawrence</i>	Director, Pacific Northwest College of Art
<i>Elizabeth Leach</i>	Owner, Elizabeth Leach Gallery
<i>Helen Lessick</i>	Conceptual Artist
<i>Mike Lindberg</i>	Portland City Commissioner
<i>Lloyd Lindley</i>	Board Chair, ArtQuake
<i>Jo Long</i>	Director, Carver Community Center, San Antonio, Texas
<i>John Lottes</i>	Executive Director, Oregon School of Arts and Crafts
<i>Keeston Lowery</i>	Assistant to City Commissioner Mike Lindberg
<i>Fred Lueck</i>	Executive Producer, Music Theatre of Oregon
<i>Roger Luedtke</i>	Chair, Classical Chinese Garden Society
<i>E. Kimbark MacColl</i>	Author, historian
<i>Eloise MacMurray</i>	Public Art Manager, Metropolitan Arts Commission
<i>Doug Macy</i>	Partner, Walker & Macy Landscape Architects
<i>Linda Magee</i>	Executive Director, Chamber Music Northwest
<i>Julie Mancini</i>	Executive Director, Portland Arts & Lectures
<i>Paula Manley</i>	Community Television Coordinator, Tualitan Valley Community Access

---

<i>Karen Manning</i>	Executive Director, ArtQuake
<i>Deborah Margol</i>	Director of Marketing and Cultural Tourism, Metropolitan Dade County Cultural Affairs Council
<i>Melvin Mark, Jr.</i>	President, Melvin Mark Properties
<i>Ann Mason</i>	Executive Director, Arts Plan 2000+
<i>Nancy Matschek</i>	Chair, Dance Program, Portland State University
<i>Marianne Mayfield</i>	Jazz Musician and Singer
<i>Terry McCall</i>	District Manager, U.S. Bank of Oregon
<i>William McCormick</i>	President, Traditional Concepts
<i>Neil McFarlane</i>	Project Operations Manager, Oregon Convention Center, METRO
<i>Ed McNamara</i>	Director of Neighborhood Partnerships, Oregon Community Foundation
<i>Richard Meeker</i>	Publisher, <i>Willamette Week</i>
<i>Don Merkt</i>	Artist/Architect
<i>Art Middleton</i>	Artist/Architect
<i>Donna Milrany</i>	Assistant Director, Metropolitan Arts Commission
<i>Dan Monroe</i>	President, Oregon Art Institute
<i>Clay Moorhead</i>	City Manager, City of Sandy
<i>Lin Murakami</i>	Executive Director, Mt. Hood Festival of Jazz
<i>Hardy Myers</i>	Attorney; Chair, Portland Future Focus
<i>Evelyn Nagel</i>	Development Director, Oregon Symphony
<i>Bill Naito</i>	President, H. Naito Properties



---

<i>Jonathan Nicholas</i>	Columnist, <i>The Oregonian</i>
<i>Anne Nickel</i>	Development Coordinator, City of Milwaukie
<i>Alice Norris</i>	Executive Director, Oregon Trail Pageant, Oregon Trail Foundation
<i>Gary O'Brien</i>	Artistic Director, Oregon Stage Company
<i>Michael O'Loughlin</i>	Marketing Director, TO-RO Consumer Shows
<i>John Osburn</i>	Attorney, Miller Nash Wiener Hager & Carlsen
<i>Annie Painter</i>	Principal, Powell Valley Elementary School
<i>Karen Patterson</i>	Cellist; Board Member, ArtQuake
<i>Philip Peach</i>	Executive Director, Oregon Lodging Association
<i>Lillian Pitt</i>	Artist
<i>Harold Pollin</i>	Owner/Operator, Sheraton Portland Airport Hotel
<i>Vicki Poppen</i>	Coordinator, Artists in Education
<i>Michael Powell</i>	Chair, Metropolitan Arts Commission
<i>Juan Prats</i>	Publisher, <i>The Hispanic News</i>
<i>Mary Puskas</i>	Executive Director, Newberg Area Chamber of Commerce
<i>Ronald K. Ragen</i>	Attorney, Davis Wright Tremaine
<i>Judith Ramaley</i>	President, Portland State University
<i>James Randolph</i>	President, Tennessee Performing Arts Center, Nashville (TN)
<i>Tess McBride Ratty</i>	Media West Home Video
<i>Christopher Rauschenberg</i>	Photographer; Director, Blue Sky Gallery

---

<i>Bill Ray</i>	Commissioner, Oregon Commission on Indian Affairs
<i>Phil Reid</i>	Artist
<i>Steve Reischman</i>	Owner, Showman, Inc.
<i>Barry Richardson</i>	Executive Director, Baltimore (MD) American Indian Center
<i>Neill Roan</i>	Director, Programming and Marketing, Hult Center for the Performing Arts, Eugene, OR
<i>Don Rocks</i>	Executive Assistant, METRO
<i>Pedro Rodriguez</i>	Executive Director, Guadalupe Cultural Arts Center
<i>Charles Rooks</i>	Executive Director, Meyer Memorial Trust
<i>Leah Rosen</i>	Assistant Coordinator to Arts Programs, Chicago Department of Cultural Affairs
<i>Laura Ross-Paul</i>	Artist
<i>Don Roth</i>	Executive Director, Oregon Symphony
<i>Mary Rush</i>	Executive Director, Arts Commission of Tigard, Tualatin and Sherwood
<i>Laura Russo</i>	Owner, Laura Russo Gallery
<i>Mike Russo</i>	Artist
<i>Kathleen Saadat</i>	Assistant to Commissioner Gretchen Kafoury
<i>Debbie Sagen</i>	Director of Community and Economic Development, City of Gresham
<i>Joan Sappington</i>	Executive Director, Lake Oswego Festival of the Arts
<i>Tad Savinar</i>	Artist and playwright

---

<i>Betty Schedeen</i>	Founding Member, Gresham Arts Commission
<i>Carole Shick</i>	Councilor, City of Beaverton
<i>David Schiff</i>	Composer; Associate Professor of Music, Reed College
<i>Alice Schlenker</i>	Mayor, Lake Oswego
<i>Ron Schmidt</i>	Executive Vice President, PSW Public Relations
<i>Arlene Schnitzer</i>	Honorary Member, Steering Committee, Fountain Association
<i>Jayne Scott</i>	Executive Director, Beaverton Arts Commission
<i>Mitzi Scott</i>	Steering Committee Member, Arts Plan 2000+
<i>Janice Scroggins</i>	Musician
<i>Gilbert Seeley</i>	Artistic Director, Oregon Repertory Singers
<i>Ethan Seltzer</i>	Land Use Coordinator, METRO
<i>El Sheldon</i>	Director of Tourism, Portland Oregon Visitors Association
<i>George Sheldon</i>	President, SERA Architects; Chair, Arts Plan 2000+
<i>Harriet Sherburne</i>	Vice President for Development, Olympia & York Properties; Chair, Advisory Committee, Portland Center for the Performing Arts
<i>Jan Shield</i>	Associate Professor of Art, Pacific University
<i>Bob Silton</i>	Artist Initiative for Contemporary Art Collection
<i>Kay Slusarenko</i>	Chair, Art Department, Marylhurst College
<i>Carol Smith</i>	District Fine Arts Specialist, Beaverton Public Schools

---

<i>Joan H. Smith</i>	Executive Director, Washington County Historical Society
<i>Steve Smith</i>	Director, Metro Performing Arts
<i>Cheryl Snow</i>	Director, Blackfish Gallery
<i>Jose Solano</i>	Educator, Artist, Metropolitan Arts Commissioner
<i>Al Solheim</i>	Developer
<i>Ramona Soto-Rank</i>	Chair, Ecumenical Ministries of Oregon, Indian Ministry Committee; Metropolitan Arts Commissioner
<i>Bill Sullivan</i>	Operating Partner, Broadway Revue
<i>Tom Tomlinson</i>	Executive Director, Alaska Center for the Performing Arts, Anchorage
<i>Leslie Tuomi</i>	Executive Director, Oregon Arts Commission
<i>Carol Turner</i>	Portland Public School Board
<i>Yolanda Valdes-Rementería</i>	Artist/Educator
<i>Don Vallaster</i>	Architect, Vallaster & Corl Architects
<i>Dale Varner</i>	President, Clackamas County Arts Commission
<i>Edgar Waehrer</i>	Planner, City of Portland
<i>John Weber</i>	Associate Curator of Contemporary Art, Portland Art Museum, OAI
<i>Joel Weinstein</i>	Publisher, <i>Mississippi Mud</i>
<i>Naj Wikoff</i>	Director of Arts and Productions, Cathedral of St. John the Divine, New York
<i>Lee Winn</i>	Architect

<i>Roberta Wong</i>	Artist
<i>Elizabeth Woody</i>	Poet; NW Native American Writers
<i>Bill Wyatt</i>	Executive Director, Oregon Business Council
<i>Joseph Wyatt</i>	School Director, Oregon Ballet Theater
<i>Linda Wysong</i>	Artist
<i>Dr. Stephano Zegretti</i>	Professor of Urban Design, Portland State University; Architect

### STEERING COMMITTEE

#### *Honorary Advisors*

James DePreist

Arlene Schnitzer

#### *Steering Committee*

George Sheldon, Chair

Mary Arnstad

Charlotte Beeman

Brian Booth

Daniel Chernoff

Gayle Darr

Harry Demorest

Sho Dozono

Glenda Durham

Don Frisbee

Nickie Lynch

Marianne Mayfield

Annie Painter

Juan Prats

Dr. Judith Ramaley

Tad Savinar

Mitzi Scott

Joel Weinstein

Virginia Willard

William Wyatt

Richard Ares

Joyce Ashmanskas

Dennis Bigelow

C. Herald Campbell

William Creevey

Frank Delia

Michael Doherty

Donna Drummond

Ed Edmo

Renee Holzman

Nancy Matschek

Sharon Mitchell

Laura Ross-Paul

Joanne Priestley

Larry Rosencrantz

Ron Schmidt

Elizabeth Waters

Dr. Nancy Wilgenbusch

Clark Worth

Joseph Wyatt

*Elected Officials*

Comm. Mike Lindberg, Chair

*Executive Director*

Ann Mason

**TASK FORCE MEMBERS**

*Arts Education*

Vicki Poppen, Chair

Annie Painter, Executive Committee Representative

Sarah Johnson, Technical Representative

Anne Avery

Candace Beck

Liz Capps

Cindy DeCecco

Charles Farmer

Bob Graves

Chris Landon

Christine Miller

Dennis Phillips

Peter Sears

Steve Smith

Ellen S. Thomas

Ron Williams

Jean Baumann

Judy Madden Bryant

Faith Clover

Jana Demartini

Don C. Frisbee

Michael Grice

Gilbert Lissy

Amy Osaki

Amy Powell

Mary Simeone

Jan Sonnitson

Greg Ware

Joseph Wyatt

*Artist's Needs*

Gayle Darr, Chair

Laura Ross-Paul, Executive Committee Representative

Donna Milrany, Technical Representative

Dan Balmer

Martin Eichinger

Andre Middleton

Christopher Rauschenberg

Cheryl Snow

Don Vallaster

Niel DePonte

Bonnie Mansen-Young

Warren Mitchell

Tad Savinar

Michael Speaker

*Cultural Diversity*

Ramona Soto-Rank, Chair  
Carlton G. Bell, Co-Vice Chair  
Theonie Gilmore, Co-Vice Chair  
Elizabeth Waters, Executive Committee Representative  
Patty Vemer, Technical Representative

Dennis Bigelow	Frank S. Delia
Bill Foster	Marlene Gabel
Susan Giacometti	Michael Griggs
Jere Grimm	Rose Hill
Linda Odenberg	Nan Shen
Joel Weinstein	Mark Woolley

*Facilities*

Larry Cole, Chair  
Glenda Durham, Executive Committee Representative  
Jane Jarrett, Technical Representative

Robert Bailey	Jerry Bolas
Dennis Crow	Jeanne Doty
Pam Erickson	Robert Freedman
Pat Harrington	Phil La Fond
Jim Lee	Julie Mancini
Marianne Mayfield	Sherry Oeser

*Public Art*

Donna Drummond, Chair  
Clark Worth, Executive Committee Representative  
Eloise MacMurray, Co-Technical Representative  
Kristin Law Calhoun, Co-Technical Representative

Linny Adamson	Charlotte Beeman
Carol Edelman	Deborah Fairley
Terri Hopkins	Michihiro Kosuge
Mike McCulloch	Gerhard Pagenstecher
Martha Radakovich	Tess Ratty
Judith Reese	Mitzi Scott

*Public Involvement*

Renee Holzman, Chair  
Nickie Lynch, Executive Committee Representative  
Susan Addy, Co-Technical Representative  
Jane Hartline, Co-Technical Representative

Kandis Brewer	C. Herald Campbell
Antoinette Dewit	Deborah Dewit
Jim Gilsdorf	Dorothea Lensch
Marilyn Mork	Don Rocks
Mary Rush	El Sheldon
Bob Wilcox	

*Resources*

Larry Rosencrantz, Chair  
Joyce Ashmanskas, Executive Committee Representative  
Linda Magee, Co-Technical Representative  
Sara Nevue, Co-Technical Representative

Steve Bauer	Ernest Bloch
Terry Brandt	Bill Bulick
Kathy Carlson	Greg Chaille
Daniel Chernoff	Mark Gardiner
Theonie Gilmore	Paul Hart
Kathleen Johnson-Kuhn	Patrick LaCrosse
Dan Monroe	Alice Norris
Mary Brown Ruble	Katherine Sammons
Tad Savinar	Jayne Scott
Caryn A. Tilton	

*The following individuals met in focus groups to address specific areas of concern not covered by previous sessions:*

Howard Aaron	Rebecca Adams
Howie Bierbaum	Kim Brown
Ed Geis	Jim Gilsdorf
Beth Harper	Kevin Leinbach
Allen Nause	Gary O'Brien
Vana O'Brien	Steven Clark Pachosa



Michael Palmer  
Jan Powell  
Keith Scales  
Dennis & Linny Stovall  
Sandra Williams

David Poulshock  
Joanna Priestley  
Galen Schrick  
Tom Taylor

#### PUBLIC MEETING ATTENDEES

##### *Clackamas Community College (4/11/91)*

Richard Ares  
Carlton Bell  
Jerry Bolas  
C. Herald Campbell  
Glenda Durham  
Robert Freedman  
Robert Graves  
Hawk the Storyteller  
Ruth Jensen  
Kathleen Johnson-Kuhn  
Harriet Jorgensen  
Gerhard B. Pagenstecher  
Joan Sappington  
Loretta Schwartz  
Mark Woolley  
Carole Yates

Rona Aspholm  
Andrea Beylund  
Bill Bulick  
Vernetta A. Clark  
Pam Erickson  
Theonie Gilmore  
Michael Griggs  
John Hooley  
Leland John  
Marion Jones  
Chris Landon  
Carie Pommerville  
Bill Schuyler  
Ramona Soto-Rank  
Joe Wyatt

##### *Oregon Convention Center (4/11/91)*

Barbara Alatarre  
Violet Allman  
Pauline Anderson  
Michael Ray Ball  
Carlton Bell  
Bob Bridgeford  
Gladys Carlson  
Nancy Chernoff  
Kolin Craig  
Jennifer Curtis  
Francesa Deimel  
Niel DePonte

Peter Alef  
C. Anderson  
Joyce Ashmanskas  
Kelly Ball  
Betty Black Wolfe  
Bruce Broussard  
Isabella Chappell  
Charles Craig  
Marcella Cunningham  
Cindy DeCecco  
Jana Demartini  
Donna Drummond

Gabrielle Foulkes  
Theonie Gilmore  
Hawk the Storyteller  
Bruce Huntwork  
Kathleen Johnson-Kuhn  
Phil & Nancy La Fond  
Dorothea Lensch  
Mike Lindberg  
Stella J. Logan  
Sheila Mancilla  
Eilene Manning  
Marianne Mayfield  
Walt Mose  
Beth Peters  
Charlotte Pitt  
David Quincy  
Wanda Redwing  
Tom Sampson  
Loretta Schwartz  
Hazel M. St. Antoine  
David V. Stevens  
Theresa Tsosie  
Virginia Willard

Verena Gilbert  
Leon Hamblin  
Rose Hill  
SuEllen Johnson  
Jim Jones  
Jim Lee  
Charlotte Lewis  
Arnold Littlehead  
Donna Lopez  
Julie Mancini  
Marsha Masey  
Andre Middleton  
Mr. and Mrs. Pepper  
Helen L. Peterson  
Chris Poole  
Bill Ray  
Delores Riding In  
Tad Savinar  
Bing Sheldon  
George Standing Elk  
Jeb Stewart  
Karin Wallace

*Mt. Hood Community College (4/16/91)*

Sande Allman  
Carlton Bell  
L.F. Brian  
Debora Cohen  
Dennis Crow  
Jeanne T. Doty  
Meri Ealy  
Mary Glaine  
M. Leon Hamblin  
Penny Holeman  
C.B. Koenig  
Sheila Mancilla  
Mike McCulloch  
Clay Moorhead  
Annie Painter

Janet Armstrong  
Jeanine C. Boldt  
Less & Carrie Carman Hamblin  
Phil Coquillet  
Jackie Dolan  
Glenda Durham  
Kathleen Eldridge  
Robert Graves  
Pat Harrington  
Michael P. Jones  
Gilbert Lissy  
Gwenda McCall  
Mike McKeel  
Denise Osbourn  
Bing Sheldon

Susanne R. Sherman  
Ada Zimmerman

Cheryl Snow

*Portland Community College, Rock Creek Campus (4/18/91)*

Anne Avery  
Bruce Browne  
Faith Clover  
Gene Demmer  
Martin Eichinger  
Theonie Gilmore  
Pete Mesteth  
Loretta Schwartz  
Jose Solano

Debbie Boone  
Nancy Chernoff  
Larry Cole  
Betty Duvall  
Margaret Eickman  
Mike McCulloch  
Steve Rothman  
Jan Shield  
Kathleen Tyan

# Appendix B

## Performing Arts Center Facility Survey

During the winter and spring of 1991, consultants from The Wolf Organization, Inc. worked with a community-based committee, called ArtsPlan 2000+, to conduct a community cultural planning project for the City of Portland, Oregon and the Tri-County region. As part of that project, the consultants conducted a survey of seven performing arts centers across the country and in Canada. The results of that research are summarized in the following Appendix.

## Alaska Center for the Performing Arts

### *Anchorage, Alaska*

#### *Facility description*

The Alaska Center for the Performing Arts (ACPA), opened in 1988, was built as part of "Project 80s," a \$400 million, 8 year capital construction project to upgrade cultural and recreational facilities in Anchorage. The project, funded by the state, included construction of a library, a convention center, an arena, and bicycle trails. ACPA, the final part of the project to be completed, includes the following performing spaces:

**Evangeline Atwood Concert Hall:** seats 2,100, multi-purpose proscenium stage with full stage rigging, designed as a concert or symphony hall

**Discovery Theatre:** seats 722, traditional proscenium stage with full stage rigging and a large stage house suitable for legitimate theatre

**Sydney Laurence Theatre:** seats 377, asymmetrical seating arrangement for traditional proscenium theater with full fly

In addition, ACPA includes a 50' x 50' rehearsal hall which is currently being renovated to a black box performance space, a 50' x 85' rehearsal space (with no public access), and 3,000 sq. ft. of administrative office space (total square footage for ACPA is approximately 200,000).

#### *Other local performance venues*

**4th Avenue Theatre:** seats 400, movie house temporarily converted to performance space during construction of ACPA, subsequently re-converted to a movie house, currently not being used

**West High:** seats 1,200, high school theatre space with full fly

**University of Alaska at Anchorage Wendy Williamson Auditorium:** seats 1,500, used primarily for university events, some on-stage cabaret use, and some community events

**U. of Alaska Recital Hall and Theatre:** seat 205 and 174 respectively, used primarily for university events

**Museum and Library Auditoriums:** seat 231 and 234 respectively, used primarily for small community events or programs associated with the facility, no fly loft

**Sullivan Arena:** seats 8,000, used for rock concerts, ice shows, circuses, ice hockey

**Eagan Convention Center:** seats 2,000, used primarily for conventions and for some rock concerts when ACPA is not available

*Primary tenants*

**Atwood Concert Hall:** home of the Anchorage Concert Association (a major presenter with 60-70 events/year in 4 varied series) and the Anchorage Symphony (community orchestra presenting 5 concerts/year, as well as serving as symphony for "Nutcracker" performances and the Opera)

**Discover Theatre:** home of the Anchorage Opera Company (produce 3 operas/year, with one being an American musical) and the Alaska Junior Theatre (a presenter of children's theatre, for 4 week-long presentations with bussing of school children and weekend general public performances)

**Sydney Laurence Theatre:** home of the Alaska Stage Company (a semi-professional theatre company producing 3 shows/year for a 4-5 week run) and the Alaska Festival of Music (presenter/producer of a month-long chamber music festival running from June 21 through July 21)

*Other uses*

In 1990, ACPA acted as presenter of 16 different events (total of 78 performances) to fill in unused dates at the Center and to offer events not offered by other organizations. ACPA also co-produced a summer event ("Oil City Symphony") with the Anchorage Concert Association. In 1991, ACPA's role as presenter is more focused on co-presenting with the Junior Theatre and presenting/producing festival-type activities such as a week-long Soviet cultural exchange festival, rather than presenting their own series as was done in 1990. This is because there are fewer dates and fewer programming gaps to fill.

There are also other local performing arts renters as well as commercial renters. Commercial rentals include body building contests (6-7/year), beauty pageants (8-9/year), graduations, spelling bees, and commercial presenters (such as for "Cats" and "Les Miz", country western and rock concerts, etc.)

*"Dark" periods*

Generally, use of all performing spaces during the summer is minimal. Last year, ACPA co-produced "Oil City Symphony" with the Anchorage Concert Association in hopes of attracting the summer tourists. This event was not extremely successful, but discussion is underway with the Concert Association to plan a summer jazz festival which may

be held this summer outdoors at an adjacent park. Generally, summer is a time for capital construction, maintenance, and staff vacation time.

*Estimated budgets of major users*

Anchorage Symphony: \$500,000-\$750,000  
 Anchorage Concert Association: \$2.5 million  
 Anchorage Opera Co.: \$1.5 million  
 Alaska Junior Theatre: \$100,000  
 Alaska Stage Company: \$500,000-\$600,000  
 Alaska Festival of Music: \$100,000

*Rate schedule*

Resident companies have a seat on the board of directors (3 of which are voting seats and 3 of which are not, by self-selection), have priority in scheduling (provided dates are set by November 1 for the following year), and get an additional reduction in rental rates based on the size of their contract (contracts for longer use of facility get greater discounts). In general, rental rates are quite low, in part to match rates existing prior to the opening of ACPA and also to match rates for other venues in town. Municipal support of ACPA allows these (subsidized) lower rates to be maintained.

Actual rate schedules are available separately and are not bound with this report.

*Total attendance for most recent FY*

300,000 (resident companies maintain their own attendance figures, and they are not available from ACPA)

*Price ranges for tickets*

Generally, top ticket prices for events at ACPA are in the \$20s. The general range in prices is fairly great, however, with Opera tickets ranging in price from \$6 (student rates) to \$65. "Cats" tickets ranged from \$26 to \$56, Concert Association tickets generally range from \$6 to \$50, top price Symphony tickets are generally \$28, Alaska Stage Company top ticket prices are generally \$18, Alaska Junior Theatre day school events are generally \$2-\$3, and ACPA-presented events generally range in price from \$8 to \$28. The Opera, the Symphony and the Concert Association frequently sell most tickets by subscription. Per capita household income and general education level in Anchorage is higher than in most communities, and the per capita attendance at performing arts events is high as well. (Anchorage population is 225,000-230,000)

*User fee/entertainment tax*

There is a municipal \$1.00/ticket surcharge for all tickets (except for students and senior citizens) to ACPA events to retire the final construction debts. This surcharge is included in listed ticket prices.

*Center role*

In FY '90, 14% of activity days were ACPA-presented activities (84 out of 600). The balance were rentals (86%). The summer of 1990's production, "Oil City Symphony" (included in the 600 activity days), was partially produced by the Center in cooperation with the Anchorage Concert Association, in that sets and costumes were produced locally, rather than having them shipped in. Generally, ACPA does not fully produce its own events.

*Marketability of event types*

The marketability of any of the described events is obviously influenced by the name recognition of any particular performing group or artist. Rankings reflect average marketability, using a scale of 1 (lowest) to 5 (highest). NA reflects a type of event not presented or produced in the facility.

A concert by the local symphony	3
A concert by a major visiting symphony	NA
A chamber music concert or a recital	1
A performance by a local opera company	4
A performance by a visiting opera company	NA
A current Broadway musical, such as "A Chorus Line" or "Cats"	5
A play by a professional theatre company	4
A current Broadway drama such as "Steel Magnolias" or "Driving Miss Daisy"	4
A play presented by a local community theatre group	2
A children's theatre performance	4
An experimental or avant garde play	2
A performance by a local ballet company	NA
A performance by a visiting ballet company	4
A performance by a modern dance company	4
A one-man show, such as Hal Holbrook as Mark Twain	5
A comedy act, such as Jay Leno	5
A musical performance by a popular artist such as Frank Sinatra or George Benson	5
A jazz concert	4
A rock concert	NA
A country and western concert	5



A concert of ethnic music or dance	3
Novelty events (Mummenschanz, Chinese Opera, etc.)	4
Family event	4

*Marketing efforts to users*

The Center has a marketing/development staff of 3.5 people for all marketing and development responsibilities. Marketing efforts to attract users include advertising in trade journals for non-local users, and the development of a brochure to attract local non-arts users. No marketing is necessary for local arts users, as they are all familiar with the facility.

*Marketing efforts for audience*

Marketing efforts to attract audience to ACPA-presented events include direct mail, advertising, use of local media, and other traditional marketing strategies. In addition, ACPA produces a semi-monthly newsletter which appears as an insert in the local paper, listing all events at the Center as well as providing articles about activities. ACPA marketing staff also coordinates newspaper listings for all Center events, and maintains a mailing list cooperative for use by renters of the Center.

*Marketing efforts for tourists*

ACPA is located across the street from the Convention Center, which uses it as a marketing tool in attracting conventions. Several major conventions have used the facilities of the ACPA in conjunction with their use of the Convention Center. In addition, ACPA advertises in hotel books and puts flyers at other local institutions. Last summer, research was done on the nature of the tourist market in Anchorage, and it was determined the majority of the tourists are stopping only briefly in Anchorage as part of a boat or train trip, which means that it is difficult to attract them to evening events at the Center. There are a number of tourists, however, who stay locally with friends or family and who are thus potential attenders of summer events. Programming is being developed to attempt to attract these tourists, such as the summer outdoor jazz series mentioned above.

*Education programs*

ACPA has a half-time education staff person, who primarily acts as coordinator of resident companies educational programs, particularly day programs for school children. In addition, this person works with all users of ACPA to encourage development of pre-show lectures or other educa-

tional tools, if none are planned. This summer, ACPA is offering a program on technical aspects of theatre for high school students, taught by ACPA staff. ACPA was also a recent participant in the John F. Kennedy Center Toyota Institute, a national program to train arts center staff around the county in how to develop educational programming and how to work with schools.

*Programs for special constituencies*

Anchorage's population is primarily white, the largest non-white population being Korean. Efforts have only recently been started to present ethnic programming, including some Native Alaskan programming. ACPA has worked as a leader in outreach to the "differently-abled" community, is currently drafting guidelines for users on how to incorporate signers for the hearing-disabled into programming, and has developed a special ticket-purchasing method for wheel-chair patrons. ACPA and most renters have ticket discounts for senior citizens.

*Local facilities for multi-cultural/ethnic activities*

None, although there are active neighborhood councils that deal with community issues. There are also a number of community centers for lower income neighborhoods which offer after-school athletic programs for children and other socially-oriented programs. None of the centers offer arts-related programming, however.

*Neighborhood facilities* See above.

*Regional programming* None. The ACPA serves only Anchorage, since the region around Anchorage is essentially physically inaccessible.

*Public/private partnerships*

ACPA opened in 1988, having been constructed as part of a state-funded project designed to upgrade Anchorage's cultural and recreational facilities. ACPA is an independent nonprofit organization with nearly 70% of operating funds deriving from municipal support. This means that ACPA operates as a quasi-governmental agency, with all meetings being public meetings, all information being considered public information, budgets being submitted to the Mayor's office and subsequently to the Assembly for approval, and monthly financial statements being submitted for review by the City budget comptroller.

<i>Income for most recent FY</i>	\$2,861,405 (operating fund only)		
<i>Sources of this income</i>	<b>Earned Income</b>		
	Concession	34,409	
	Rentals	227,119	
	Production	81,188	
	Advertising	47,199	
	Ticket sales-sponsored events	741,555	
		<u>1,131,470</u>	40% of total
	<b>Public Support</b>		
	Municipality of Anchorage	\$1,325,000	46% of total
	<b>Contributed Income</b>		
Private contributions	274,806		
Grants	22,928		
	<u>297,734</u>	10% of total	
<b>Interest/Other</b>			
Interest and other	107,201	4% of total	
<i>Expenses for most recent FY</i>	\$2,861,185		
<i>Personnel costs for most recent FY</i>	30%		
<i>Major user involvement in policy</i>	The six resident companies each have a seat on the board of directors, 3 of which are voting seats and 3 of which are not, by self-selection (on a 27-member board of directors).		
<i>Geographic area served (over 60% of audience drawn from this area)</i>	Anchorage		

Calgary Centre for the Performing Arts

*Calgary, Alberta*

*Facility description*

The Calgary Centre for the Performing Arts is part of a mixed-use facility located on Olympic Plaza that combines performing and commercial space. The facility was constructed with the intent that income from rentals of the commercial space would go to support the Centre, ideally amounting to 10% of the Centre's operating budget. To date, commercial rentals have not been as successful as hoped, and one commercial space intended to be a bar has been transformed into a performing space (seating 62) by an avant garde theater group. The Centre includes the following performing spaces:

**Jack Singer Concert Hall:** seats 2,000 (including 200 in choir loft), classic concert hall

**Max Bell Theatre:** seats 750, European opera house style proscenium theatre with full fly loft

**Martha Cohen Theatre:** seats 450, Elizabethan style theatre with flexible proscenium stage and full fly

**Empress Theatre:** seats 225, proscenium stage with less than full fly, scheduled to be completed no earlier than September, 1992.

*Other local performance venues*

**Southern Alberta Jubilee Auditorium:** seats 2,700, proscenium with full fly, serving as home to the Calgary Opera, Calgary Ballet, and road shows; Auditorium also includes a second performing space which seats 500, serving as home to a local dance company and other community activities

**University of Calgary:** several performing spaces, the largest of which seats 500, used primarily for university activities

**Mt. Royal College:** two performance spaces seating 300 each; used primarily for college activities although one space used for musical theatre is used for community activities as well

**Olympic Saddledome:** seats 20,000, used primarily for sports and pop music concerts

**The Coral:** arena which seats 9,000, similar in use to Saddledome

There are also several smaller performance facilities seating 200-300, used by various amateur theatre groups.

<i>Primary tenants</i>	<p><b>Jack Singer Concert Hall:</b> home of the Calgary Philharmonic Orchestra, which presents 70-80 concerts a year, for an evening use schedule of approximately 90 uses/year, as well as a heavy day rehearsal schedule</p> <p><b>Max Bell Theatre:</b> year-round lease to Theatre Calgary, with lease-back arrangement for Centre-presented events</p> <p><b>Martha Cohen Theatre:</b> year-round lease to Alberta Theatre Projects, with lease-back arrangement for Centre-presented events</p>
<i>Other uses</i>	<p><b>Jack Singer Concert Hall:</b> This hall is used an average of 220 days/year, with the Philharmonic using 90, the Centre using about 40, concert promoters using 30-40 (4 wall rentals), non-theatrical uses of 25-30/year (conventions, religious and political groups), and 12 rent-free community access dates/year. Day use averages 300 days/year, with rehearsals, sales meetings, private rentals (use of lobby for dinners, etc.) Other performances spaces are leased on an annual basis as described above.</p>
<i>"Dark" periods</i>	<p>Generally, use of all performing spaces during the summer is minimal. The period from Christmas to New Year's is also a hiatus. Max Bell Theatre is generally dark June through August, and Martha Cohen Theatre is dark for August, during which time maintenance work is done.</p>
<i>Estimated budgets of major users</i>	<p>Calgary Philharmonic Orchestra: \$4 million          Theatre Calgary: \$2.5-3 million          Alberta Theatre Projects: \$3.5-4 million</p>
<i>Rate schedule</i>	<p>Each major user has a unique lease agreement that has evolved since the opening of the Centre (1985) and which is composed of various written and verbal agreements. Negotiations are currently underway to establish 60-year written lease agreements with these organizations, now that the relationship between the Centre and the lessors has stabilized. The Philharmonic leases office space in the Centre at the rate of \$8/sq. ft. (considerably less than market rate), gets a 10% discount on published Hall rental rates, and pays technical costs and front of hall costs based on a negotiated flat rate. The Centre provides all maintenance for the Hall. The resident theatre companies' leases provide for rental of office and storage space, as well as use of performance space. These companies assume respon-</p>

sibility under their leases for stage maintenance costs for the leased spaces, although the Centre continues to provide general facility maintenance.

Actual rate schedules are available separately and are not bound with this report.

<i>Total attendance for most recent FY</i>	300,000 (resident companies maintain their own attendance figures, and they are not available from the Centre)						
<i>Price ranges for tickets</i>	Resident companies ticket prices range from \$18-\$35, as do most ticket prices for Centre-presented events. Broadway shows, however ("Les Miz", "Phantom") range in ticket prices from \$57-\$70 or \$85.						
<i>User fee/entertainment tax</i>	None, although there is a \$.50/ticket surcharge for all tickets to Centre events for a Centre Capital Replacement Fund (for resident companies and other renters' ticket sales, as well as for Centre-presented events.)						
<i>Center role</i>	The Centre acts as presenter or co-presenter and rental house, rarely producing its own events. The Centre does present/produce an annual week-long Children's Festival, which has a budget of \$680,000 (FY '90) and the Calgary International Organ Festival, which occurs every four years and has a budget of \$750,000. It also occasionally co-produces events with resident companies. Centre philosophy is not to exclude producing events, but to generally avoid doing so in order to not compete with resident companies. The Centre sees its role of presenter as being to fill gaps in programming by local companies, and again, not to compete with them. The Centre's role is also to provide a stable facility in which resident companies can operate.						
<i>Marketability of event types</i>	<p>The marketability of any of the described events is obviously influenced by the name recognition of any particular performing group or artist. Rankings reflect average marketability, using a scale of 1 (lowest) to 5 (highest). NA reflects a type of event not presented or produced in the facility.</p> <table> <tr> <td>A concert by the local symphony</td> <td>3.5</td> </tr> <tr> <td>A concert by a major visiting symphony</td> <td>NA</td> </tr> <tr> <td>A chamber music concert or a recital</td> <td>4.0</td> </tr> </table>	A concert by the local symphony	3.5	A concert by a major visiting symphony	NA	A chamber music concert or a recital	4.0
A concert by the local symphony	3.5						
A concert by a major visiting symphony	NA						
A chamber music concert or a recital	4.0						

A performance by a local opera company	5.0
A performance by a visiting opera company	NA
A current Broadway musical, such as "A Chorus Line" or "Cats"	5.0
A play by a professional theatre company	3.5
A current Broadway drama such as "Steel Magnolias" or "Driving Miss Daisy"	NA
A play presented by a local community theatre group	3.0
A children's theatre performance	NA
An experimental or avant garde play	4.0
A performance by a local ballet company	5.0
A performance by a visiting ballet company	4.0
A performance by a modern dance company	4.0
A one-man show, such as Hal Holbrook as Mark Twain	4.0
A comedy act, such as Jay Leno	4.0
A musical performance by a popular artist such as Frank Sinatra or George Benson	4.0
A jazz concert	4.0
A rock concert	NA
A country and western concert	4.0
A concert of ethnic music or dance	3.0
Novelty events (Mummenschanz, Chinese Opera, etc.)	4.0

*Marketing efforts to users*

The Division of Centre Services (staff of 4, which includes responsibility for bar and front of house administration) markets facility to potential users, including non-theatrical uses of the space. Apart from close personal contact with promoters, there is little marketing effort for additional theatrical uses of the space. Marketing for the new Empress Theatre, which is intended for use by community groups, will require more effort.

*Marketing efforts for audience*

There are 3 staff people in marketing/sales. There are also 2 staff people for Corporate Communications, which includes public relations, preparation of the annual report, and planning for community programming (the 12 free community uses/year). Centre staff produce a bi-monthly calendar listing all Centre events, entitled "Centrefold." This calendar is distributed to all Centrestage members (subscribers), local arts organizations, media, and targeted households in selected areas of Calgary. Staff use traditional marketing techniques to attract audiences to Centre-

presented events, including direct mail, paid advertising, television and radio promotion, etc.

*Marketing efforts for tourists*

The Centre works closely with the Convention and Visitors Bureau, advertises actively in tourist publications, and gets television and radio promotion and coverage. All Centre events are listed in "Where", a magazine available at all Calgary hotels.

*Education programs*

All of the resident companies have their own independent educational programming. In addition, the Centre has initiated partnerships with resident companies and local schools focussing on arts projects in high schools. The Centre also produces/presents the annual Calgary International Children's Festival held the end of May/first week in June and which draws over 75,000 people. In FY '91, this Festival included 135 mainstage performances, several visual arts programs, on-site performers, and hands-on activities.

*Programs for special constituencies*

The Centre has targeted some programming specifically for senior citizens (big band tea dances, for example) and offers discounted tickets for this same group. In addition, several events at the Children's Festival are aimed at hearing impaired, visually impaired, and special needs audiences.

Calgary has until recently been a fairly homogeneous community, so that serving minorities has not been an issue. Currently, programming is being planned to reach newly developing ethnic groups through existing programs, rather than creating separate programs.

*Local facilities for multi-cultural/ethnic activities*

None

*Neighborhood facilities*

None

*Regional programming*

Calgary is located in ranch country, so that outside of the immediate Calgary region, the population is quite sparse. The mandate is for the Center to serve all of southern Alberta, but regional marketing efforts are limited. Children are bussed in to attend the Children's Festival, but not for other events.



<i>Public/private partnerships</i>	Initial building costs (completed in 1985) were \$81 million, of which the province provided \$58 million, the City provided \$10 million, the private sector provided \$12 million, and the federal government provided \$1 million. Also included in the governmental support agreement was a 5-year provision of \$1.2 million/year each from the province and the City. This agreement has been renewed for a sixth year and negotiations are underway to extend it further (as well as to increase the amount of support.) The governmental support acts as an indirect subsidy to users of the Centre, as it allows the Centre to provide subsidized user charges.																															
<i>Income for most recent FY</i>	\$5,750,000 (operations only)																															
<i>Sources of this income</i>	<table border="0"> <tr> <td colspan="2"><b>Earned Income</b></td> <td></td> </tr> <tr> <td>Theatre and concert hall:</td> <td>\$1,928,000</td> <td></td> </tr> <tr> <td>Children's Festival:</td> <td>674,000</td> <td></td> </tr> <tr> <td>Concessions and catering:</td> <td>608,000</td> <td></td> </tr> <tr> <td>Retail leases:</td> <td>140,000</td> <td></td> </tr> <tr> <td></td> <td><u>3,350,000</u></td> <td>58% of total</td> </tr> <tr> <td colspan="2"><b>Public Support</b></td> <td></td> </tr> <tr> <td>Province of Alberta:</td> <td>1,200,000</td> <td></td> </tr> <tr> <td>City of Calgary:</td> <td>1,200,000</td> <td></td> </tr> <tr> <td></td> <td><u>2,400,000</u></td> <td>42% of total</td> </tr> </table>		<b>Earned Income</b>			Theatre and concert hall:	\$1,928,000		Children's Festival:	674,000		Concessions and catering:	608,000		Retail leases:	140,000			<u>3,350,000</u>	58% of total	<b>Public Support</b>			Province of Alberta:	1,200,000		City of Calgary:	1,200,000			<u>2,400,000</u>	42% of total
<b>Earned Income</b>																																
Theatre and concert hall:	\$1,928,000																															
Children's Festival:	674,000																															
Concessions and catering:	608,000																															
Retail leases:	140,000																															
	<u>3,350,000</u>	58% of total																														
<b>Public Support</b>																																
Province of Alberta:	1,200,000																															
City of Calgary:	1,200,000																															
	<u>2,400,000</u>	42% of total																														
<i>Expenses for most recent FY</i>	\$5,667,013																															
<i>Personnel costs for most recent FY</i>	55%																															
<i>Major user involvement in policy</i>	None, and none is being considered. Involvement by constituent users in Centre policy and management issues is considered impractical. However, there is a staff level Operating Committee, composed of Centre and resident company staff representatives, which meets on a regular basis to discuss operating issues.																															
<i>Geographic area served (over 60% of audience drawn from this area)</i>	Calgary and immediate vicinity																															

Playhouse Square Foundation

*Cleveland, Ohio*

*Facility description*

The Playhouse Square Foundation (PSF) consists of three contiguous theatres, originally built in 1921-22 as for-profit theatres in downtown Cleveland. The Foundation was formed in 1973 to safeguard the theatres from demolition, and they were subsequently renovated as the initial part of a city redevelopment plan. The three theatres are:

**State Theatre:** seats 3,000, proscenium theatre with full fly loft (stagehouse, loading dock and scenery area substantially expanded during renovation)

**Palace Theatre:** seats 2,700, proscenium theatre with full fly loft (38 ft. deep stage)

**Ohio Theatre:** seats 1,000, proscenium theatre with full fly loft

Projects of the Foundation that extend beyond these performance facilities include use of Foundation-owned property for construction of an Office Tower on Playhouse Square, and planning for the development of a nearby luxury hotel, a restaurant, and market-rate housing, also to be located on Foundation-owned property.

*Other local performance venues*

**Front Row:** seats 3,200, theatre in the round used primarily for pop entertainment (located in an eastern suburb)

**Music Hall:** seats 3,000, part of City of Cleveland Convention Center used for legitimate and pop music presentations

**Nautica:** seats 5,000, outdoor performance area on river used primarily for pop music presentations

**Blossom Music Center:** seats 5,000 in pavilion and 13,000 on lawn, used as summer home of Cleveland Orchestra and for big-name pop music presentations

**Coliseum:** seats 20,000, used for sports and big-name pop entertainers

**Public Hall:** seats 10,000, downtown arena used similarly to Coliseum

**Severance Hall:** seats 1,800, winter home of Cleveland Orchestra located in University area (near Case Western)

**Cleveland Playhouse:** includes 3 small theatres, ranging from 150 to 850 seats; used for LORT theatre September through May

**3 community theatres:** seating 500 (approximately)

**Convocation Center for Cleveland State:** currently under

construction, to be used primarily for Cleveland State activities and some pop entertainment

*Primary tenants*

**State Theatre:** home of the Cleveland Ballet (63 performances/year) and Cleveland Opera (29 performances/year)

**Ohio Theatre:** home of Great Lakes Theater Festival (LORT) (110 performances/year), Ohio Ballet (chamber ballet)(9 performances/year) and DanceCleveland (modern dance presenter)(7 performances/year)

**Palace Theatre:** None (all programming in this theatre is by Playhouse Square Theatre)

*Other uses*

**State Theatre:** Cuyahoga Community College performances (4/year), PSF produced/presented performances (56/year) and performances by other renters (15/year)

**Ohio Theatre:** Cuyahoga Community College performances (13/year), PSF produced/presented performances (73/year), and performances by other renters (10/year)

**Palace Theatre:** PSF presented performances (116/year) and performances by other renters (26/year)

Cuyahoga Community College uses the theatres for 15 performances a year, free of charge. This is part of the agreement reached with the state through which capital funds are funneled through the College to PSF.

In addition to the above-described performances, there are 169 special events/year, including wedding receptions, pre-concert receptions, etc. (non-performance usages). These usages include the three theaters, rehearsal halls, and Kennedy's (room seating 85 at tables or 125 in row seating; used primarily for meetings and parties).

(Number of performances/events based on 1989/90 data.)

*"Dark" periods*

January and June are traditionally the slowest months, with a total of 21 and 26 performances/month respectively, as compared to an annual average of 45 performances/month for all theatres.

*Estimated budgets of major users*

Not available through PSF; major users operate entirely independently from the Foundation

*Rate schedule*

Each major user has a unique lease agreement with PSF, details of which are confidential. Generally, however,

major users get discounted rental fees and some waiving of associated costs (security, front of house, etc.).

Actual rate schedules are available separately and are not bound with this report.

*Total attendance for most recent FY* Total audiences of 727,000 (700,000 to performances, 21,000 to special events, and 6,000 on tours).

*Price ranges for tickets* Tickets range in price from \$6 (children's theatre performance) to \$55 (Cleveland Ballet or Kirov). The average ticket price is \$25. Broadway shows generally run \$18-\$35; top price tickets for Great Lakes Theater Festival generally run \$16-\$18; top price tickets for Opera generally are \$35.

*User fee/entertainment tax* As of April 1, 1991, the City of Cleveland admissions tax is 6% of gross sales (until April 1 this tax was 3%). This tax must only be paid by for-profit corporations, however. (PSF is nonprofit.) In addition, the City assesses a 2% net income tax on for-profit presenters, and a 2% income tax on all performer fees (for nonprofit and profit organizations).

*Center role* The PSF acts as presenter/producer (245 out of 535 performances, or 46%) and 4-wall rental agency (290 out of 535 performances, or 54%). PSF also rents the facility for special events (including wedding receptions, pre-concert receptions, etc.), of which there were 169 in FY 1989/90.

*Marketability of event types* The marketability of any of the described events is obviously influenced by the name recognition of any particular performing group or artist. Rankings reflect average marketability, using a scale of 1 (lowest) to 5 (highest). NA reflects a type of event not presented or produced in the facility.

- A concert by the local symphony 3
- A concert by a major visiting symphony 1
- A chamber music concert or a recital 2
- A performance by a local opera company 5
- A performance by a visiting opera company NA
- A current Broadway musical, such as "A Chorus Line" or "Cats" 5
- A play by a professional theatre company 2
- A current Broadway drama such as "Steel Magnolias" or "Driving Miss Daisy" 4

A play presented by a local community theatre group	1
A children's theatre performance	5
An experimental or avant garde play	1
A performance by a local ballet company	3
A performance by a visiting ballet company	4
A performance by a modern dance company	2
A one-man show, such as Hal Holbrook as Mark Twain	4
A comedy act, such as Jay Leno	5
A musical performance by a popular artist such as Frank Sinatra or George Benson	5
A jazz concert	3
A rock concert	4
A country and western concert	3
A concert of ethnic music or dance	5
Rhythm and blues concert	4
Urban musical (new genre - using gospel music, equivalent of Broadway show for black audience)	3.5

*Marketing efforts to users*

Little is done to market the facility to users since there are so few available dates. Major promoters contact PSF unsolicited for desired dates. Even advertising for nonperformance activities (wedding receptions, etc.) was ended, since 90% of the requests were not possible to fill. Roughly half of the calls received by PSF by potential users have to be refused due to unavailability of dates.

*Marketing efforts for audience*

There is a 6 person marketing staff, which carries out a marketing plan that includes paid advertising, flyers in programs, direct mail, television and radio, subscription series, news releases, sponsor promotions, and a Celebrity Seat club which provides advance ticket notice and priority seating for members paying a \$35 fee.

*Marketing efforts for tourists*

Marketing staff members travel with members of the Tourism Council on promotional trips to various cities, offer group ticket sales to visiting conventions, communicate regularly with Ohio and Pennsylvania travel agents, contact national bus tours to encourage Cleveland stopovers and performance attendance, and will host an event at the Center in connection with this year's National Tour Brokers' Convention to be held in Cleveland.

---

<i>Education programs</i>	PSF has developed educational programming in connection with the Children's Theatre performances presented in the Ohio Theatre. Working with the Junior League, the theatre company has developed study guides and pre-performance preparatory materials. In addition, PSF offers private theatre tours to specific groups on request and free tours to the general public once a month.
<i>Programs for special constituencies</i>	PSF tries to reach special constituencies in the Cleveland area through regular programming.
<i>Local facilities for multi-cultural/ethnic activities</i>	There are no facilities specifically for multi-cultural/ethnic arts activities, although there is a community center called Caramu House which houses a semi-professional theatre company that trains black actors.
<i>Neighborhood facilities</i>	None whose purpose is to offer arts activities.
<i>Regional programming</i>	None. Programming is all based at the facilities in Cleveland, with marketing efforts focussed on the Cleveland area, except in the case of a particularly unusual event. (25 buses came to the Center for an Easter Passion Play produced by a black church.)
<i>Public/private partnerships</i>	Capital funds were received from the state to cover initial facility renovation costs (funneled through Cuyahoga Community College) in the '80s (\$5 million). Additional capital funds (\$1 million for the current year) have been received through the College since that time (PSF may apply for state capital funds every other year). State funding has also come to PSF through the Ohio Arts Council, but due to budget cutbacks in the Council, this funding has been reduced. In addition, the City loaned UDAG funds (federal) to PSF to fund the construction of a parking garage which was completed in 1988. The funds, received by the City of Cleveland, must be repaid by PSF to the City (at which point the City may re-loan the funds to another agency for another purpose). Income from the parking garage will help cover operation costs of PSF once the loan is paid. Beyond this UDAG loan, PSF receives no City support other than in-kind police coverage.
<i>Income for most recent FY</i>	\$7,676,000 (Operating Fund only)

<i>Sources of this income</i>	<b>Earned Income</b>		
	Theatre ticket revenues*	\$2,098,000	
	Other operating revenues	4,306,000	
		<u>6,404,000</u>	83% of total
	<b>Contributed Income</b>		
	Unrestricted contributions	1,186,000	16% of total
	<b>Interest/Other</b>		
	Net investment income	50,000	
	Other income	36,000	
		<u>86,000</u>	1% of total

\*Gross ticket revenues were \$13.2 million, of which \$11.1 million was remitted to constituents.

<i>Expenses for most recent FY</i>	\$6,749,000 (includes theatre operations and general and administration)
<i>Personnel costs for most recent FY</i>	43%
<i>Major user involvement in policy</i>	None, and none is being considered. All policy issues are resolved solely by PSF.
<i>Geographic area served (over 60% of audience drawn from this area)</i>	100 mile radius of Cleveland, although audience members may come from as far as Toledo, Columbus, Akron or Pittsburgh for particular performances.

## Hult Center for the Performing Arts

### *Eugene, Oregon*

<i>Facility description</i>	<p>The Hult Center, constructed by the City of Eugene, opened in 1982. It consists of two performing spaces, administrative offices, and a gallery space. The performing spaces are as follows:</p> <p>Silva Concert Hall: seats 2,500, multi-purpose proscenium theatre with full fly loft</p> <p>Soreng Theatre: seats 500, altered proscenium theatre with no fly loft</p>
<i>Other local performance venues</i>	<p>Community Center for the Performing Arts: seats 200-300, used primarily for "alternative" presentations</p> <p>University of Oregon Ballroom: seats 1,000, used primarily for university programming</p> <p>University of Oregon Beall Hall: seats 550, used primarily for university programming</p> <p>University of Oregon Robinson Theatre: seats 500-600, used primarily for university theatre and dance presentations</p> <p>Lane Community College Theatre: seats 500, used primarily for theatre presentations by the college</p> <p>Parks System Community Centers: outdoor venues programmed in the summer by the Center</p>
<i>Primary tenants</i>	<p>Silva Concert Hall: home to Eugene Symphony (14 performances/year, 35-40 rehearsals, and several special events), Oregon Bach Festival (25 performances during 3 weeks in the summer), Summer Festival of Musical Theatre (total of 40 performances, 25 of which are in the Concert Hall and 15 of which are in the Soreng Theatre), Eugene Opera Company (6-8 performances/year and 40 rehearsals) and Eugene Ballet (15 performances/year)</p> <p>Soreng Theatre: home to Oregon Mozart Players chamber music ensemble (12 performances/year) and Actors Cabaret of Eugene (3 musical/comedy events/year). This theatre is primarily used by non-resident local performing arts groups.</p>
<i>Other uses</i>	<p>The Hult Center presents 50 performances/year in the Center, organized into 8 subscription series (classical, jazz, dance, new performances, children's performances, "Giving Voice" (socio-political series), world music, and world dance). There are also 12-15 commercial presentations each</p>



	year (rock and roll, magic, etc.) and some non-performance uses (business meetings, weddings (?), etc.). In FY 1990, there were a total of 187 events in the Center. (what does 841 activities mean vs 187 events?)
<i>"Dark" periods</i>	Usually no events (or few events) for last two weeks of August and first week of September.
<i>Estimated budgets of major users</i>	Not available from Center; primary tenants operate totally independently from Center.
<i>Rate schedule</i>	Rental rates for the Silva Concert Hall are \$1,750/night for commercial rentals and \$520/night for nonprofit rentals. The Soreng Theatre rents for \$500/night, a package price which includes technical staffing for lighting, house, etc. (Since this space is used primarily by smaller and less sophisticated organizations, only the package rental is available.) Resident companies, all of which are nonprofit organizations, get the published rental rate, free rehearsal space (scheduling of which is second priority to scheduling of other performances), and an 8% discount on union labor costs for technical crew.
<i>Total attendance for most recent FY</i>	221,577
<i>Price ranges for tickets</i>	Tickets range in price from \$8 (small hall events) to \$50 (classical or musical theatre events). The average ticket price is \$14.75. Commercial shows generally run \$20-\$22. In general, there is great resistance to higher priced tickets.
<i>User fee/entertainment tax</i>	There is a \$1/ticket user fee for all Center events, \$.50 of which is used for operations, and \$.50 of which is for capital costs and maintenance. This user fee applies to all Center events except those for which no admission is charged. This user fee is included in all ticket prices.
<i>Center role</i>	The Center acts primarily as a renter, with 137 out of 187 events in 1990 being rentals (73%). The remaining events are presented by the Center (50 out of 187, or 27%). The Center has not yet fully produced any events.
<i>Marketability of event types</i>	The marketability of any of the described events is obviously influenced by the name recognition of any particular per-

forming group or artist. Rankings reflect average marketability, using a scale of 1 (lowest) to 5 (highest). NA reflects a type of event not presented or produced in the facility.

A concert by the local symphony	5.0
A concert by a major visiting symphony	3.0
A chamber music concert or a recital	4.0
A performance by a local opera company	3.0
A performance by a visiting opera company	NA
A current Broadway musical, such as "A Chorus Line" or "Cats"	5.0
A play by a professional theatre company	3.0
A current Broadway drama such as "Steel Magnolias" or "Driving Miss Daisy"	4.0
A play presented by a local community theatre group	2.0
A children's theatre performance	5.0
An experimental or avant garde play	3.5
A performance by a local ballet company	3.0
A performance by a visiting ballet company	4.0
A performance by a modern dance company	4.0
A one-man show, such as Hal Holbrook as Mark Twain	4.0
A comedy act, such as Jay Leno	3.0
A musical performance by a popular artist such as Frank Sinatra or George Benson	4.0
A jazz concert	3.5
A rock concert	5.0
A country and western concert	3.0
A concert of ethnic music or dance	4.0
World dance (international)	4.0
New Age concert	4.0
Gospel	3.0
Performance art	3.5

*Marketing efforts to users*

Little is done to market the facility to users since there are so few available dates. Marketing staff maintain personal contacts with agents and promoters, and the Center prides itself on the level of service it offers to promoters who use the facility, which results in increased usage by these promoters.

*Marketing efforts for audience*

Marketing staff consists of 2.0 FTE. The main emphases of Center marketing are direct mail and print media. Direct

mail efforts include subscription brochures to all former ticket buyers, a bi-monthly newsletter to all ticket buyers, and segmented (by potential interests) postcard mailings to selected groups of ticket buyers. Print media efforts include paid advertising (local and selected Portland publications), newspaper articles, and reviews. Television advertising is used to kick-off subscription campaigns, but not to advertise specific events. Marketing efforts are not limited solely to Center-presented events: the newsletter includes schedules and articles about renters' events, newspaper articles and reviews are solicited for all events. The marketing staff sees their responsibility as marketing all Center events, and they see themselves as partners with any users of the facility.

*Marketing efforts for tourists*

The summer festivals (Oregon Bach Festival and Festival of Musical Theatre) are specifically programmed with the idea of attracting tourists to the Center. Specific marketing efforts include purchasing advertising in Visitor Guides to Eugene, as well as working with the Convention Office to provide calendar information of events to those attending conventions in Eugene. There are also regularly scheduled tours of the Center for tourists wishing to visit the facility outside of regularly scheduled events.

*Education programs*

Education staff at the Center consists of one full time staff person. 80% of Center-presented events have educational activities associated with the event, including residencies, master classes, symposiums, and pre-concert lectures. The Center has a ticket scholarship program through which 30-60 free tickets are offered to classes for presentations that are part of the class curriculum plan. This program is coordinated by the Director of Program and Marketing and the curriculum coordinators of the local school districts. The philosophy of the Center is that all programs should be educational, since a goal of the Center is to create a more meaningful life and dialogue in the community. Resident companies also have their own educational programs.

*Programs for special constituencies*

The Hult Center is a 100% handicapped accessible facility. Furthermore, the Center has made substantial efforts to provide programs such as residencies for the disabled and underserved (one residency this year is in a prison with a former convict doing workshops in jazz; one residency next year is with a dance company doing dance with the dis-

abled) and infra-red systems for the hearing impaired for next year's "Giving Voice" series. The Center has also developed specific policies for programming with senior citizens, including scheduling of events in the afternoon to facilitate attendance and providing van transport to those unable to otherwise attend. All tickets to Center-presented events or in-house productions have discounts for senior citizens as well.

The Hult Center presents multi-cultural programming as part of its regular presenting series. However, staff at the Center work to incorporate representatives of the specific community whose work is to be presented into the planning for and programming of the event. (When American Indian Dance Theatre was presented, members of the Native American community were involved in planning of the event as well as in outreach and targeted ticket subsidy programs.)

Finally, the Center is designing a ticket program targeted at low income families. Through this program, U.S. Department of Agriculture voluntarily designated low income families will become eligible for substantially discounted tickets to Center-presented events. These identified families will also be invited to serve as mentor families to bring other low income families to these same events.

*Local facilities for multi-cultural/ethnic activities*

There are no facilities specifically for multi-cultural/ethnic arts activities.

*Neighborhood facilities*

None, other than Park Department community centers described under "Other local performance venues".

*Regional programming*

The Center does not do any programming outside of the facilities in Eugene. However, programming in the Center is designed to appeal to a broad spectrum of attendees, so as to provide events of interest to those living outside of the immediate urban area.

*Public/private partnerships*

None. The Hult Center is an agency of City government, being built and operated by the City of Eugene. The Cultural Affairs Commission of the City of Eugene is the official advisory body to the Cultural Services Division, which oversees administration of the Center. The facility was built in 1980-81, primarily with City funds, and opened in

September 1982. The Center receives no state support other than project support received through the state arts council.

*Income for most recent FY* \$4,494,338

<i>Sources of this income</i>	<b>Earned Income</b>		
	Earned income	\$3,685,184	82% of total
	<b>Public Support</b>		
	General fund of City of Eugene	464,159	
	Room tax allocation from City of Eugene	344,995	
		<u>809,154</u>	18% of total

*Expenses for most recent FY* \$4,494,338

*Personnel costs for most recent FY* 31%

*Major user involvement in policy* None, and none is being considered.

*Geographic area served (over 60% of audience drawn from this area)* Eugene (68% of all ticket purchasers are from Eugene).

Kentucky Center for the Arts

*Louisville, Kentucky*

*Facility description* The Kentucky Center for the Arts, the state performing arts facility, includes a gift shop, a restaurant, administrative offices, three rehearsal halls, and the following performance spaces:

**Whitney Hall:** seats 2,500, multi-purpose proscenium stage with fly loft

**Bomhard Theater:** seats 625, thrust/proscenium stage with fly loft

**Martin Experimental Theater (MeX):** seats 135, black box space

In addition, in the past year the Center became manager of a performing space located elsewhere in Louisville:

**Macauley Theater:** seats 1,400, proscenium stage with hemp and bag fly loft (restored older theater)

Negotiations are currently underway to have the 6,000 seat Louisville Gardens placed under the management of the Center. This facility is primarily a sports facility and rock concert venue, which it would remain unchanged under the management of the Center.

*Other local performance venues* **Arena at fairgrounds:** seats 19,358, used primarily for sporting events and popular music presentations  
**Memorial Auditorium:** proscenium stage, seats 1,700, used primarily for touring theatre and small music events

*Primary tenants* **Whitney Hall**  
Kentucky Opera: 24 performances/year  
Louisville Ballet: 46 performances/year  
Louisville Orchestra: 43 performances/year  
Louisville Theatrical Association's Broadway Series: 76 performances/year  
Kentucky Center for the Performing Arts: 10 performances/year  
**Bomhard Theater**  
Stage One: Louisville Children's Theatre: 209 performances/year  
Kentucky Center for the Performing Arts: 74 performances/year

	<p>MeX Theater Kentucky Center for the Performing Arts (14 performances/year)</p> <p>Macauley Theater Theatre Workshop of Louisville (black theater group) (Number of performances based on FY 1989/90 data)</p>
<i>Other uses</i>	<p>Total numbers of uses of the Center for the past year was 2,664. Of these uses, 606 were performances. The balance were rentals for weddings, chamber of commerce events, conventions, bank meetings, other community events. Use of the Center for non-performance events is seen as critical to the general image of the facility, as these uses increase the accessibility of the Center to the community.</p> <p>Total number of uses of the Macauley Theater for the past year was 200. This facility is only recently under the management of the Center, and has not yet been developed as an active venue. Prior to management by the Center, the facility was not doing well.</p>
<i>"Dark" periods</i>	<p>Use of the Center from the period June through August is minimal. Part of this is intentional, as it is during this period that annual maintenance work is accomplished. Summer is also a difficult time to attract audiences in Louisville.</p>
<i>Estimated budgets of major users</i>	<p>Kentucky Opera: \$2 million Louisville Ballet: \$2 million Louisville Orchestra: \$4 million Stage One: Louisville Children's Theatre: \$1.8 million Louisville Theatrical Association's Broadway Series: \$3 million</p>
<i>Rate schedule</i>	<p>Actual rate schedules are available separately and are not bound with this report.</p>
<i>Total attendance for most recent FY</i>	<p>468,651 (excluding Macauley Theater)</p>
<i>Price ranges for tickets</i>	<p>Ticket prices for events at the Center range from \$38 to \$6, depending on the presenter/producer. Kentucky Opera tickets range from \$38 to \$8, Broadway Series tickets range from \$31.50 to \$22.50, Stage One tickets range from \$8.50</p>

	A concert of ethnic music or dance	3.5
	A circus	2.0
	Ice shows	5.0
	Novelty events (acrobats, etc.)	5.0
<i>Marketing efforts to users</i>	Advertisements in trade journals, personal contact with known promoters (letters, phone calls), tours to visiting promoters.	
<i>Marketing efforts for audience</i>	There are 5 staff people in marketing/sales. One focus of marketing efforts is rentals and catering services for nonperformance events, which helps bring new people into the facility, with the idea that they will then feel more comfortable attending other events there. (The image of formality of the Center can serve to discourage attendance, particularly for events like county and western concerts where audiences are not sophisticated arts attenders.)	
<i>Marketing efforts for tourists</i>	The Center works closely with the state Tourist Division and the Louisville Convention and Tourist Bureau to ensure inclusion of cultural activities as one of the state's attractions for tourists. In addition, there are Center brochures at highway rest stops, hotels or other tourist information points, advertisements on television and in magazines, videos on hotel television, package deals with local hotels, and special events planned in connection with conventions.	
<i>Education programs</i>	<p>The Kentucky Center has an extensive education program, with a staff of 5 and a budget of \$500,000/year. The Center's education program brings over 40,000 students/year to the Center and provides services across the state. Programming of resident companies in the Center brings in an additional 100,000 students/year. Kentucky Center educational programming includes the following:</p> <ul style="list-style-type: none"> <li>• Imagination Celebration: two weeks of activities, performances, and field trips for students</li> <li>• Very Special Arts Day: day of activities and performances for physically and mentally challenged children</li> <li>• Family Festival Day: day of activities and performances for families</li> <li>• Governor's School for the Arts: three weeks of intensive artistic training for talented high schools</li> </ul>	



to \$7.00, Louisville Chorus tickets range from \$12.00 to \$6.00, "KCPA Presents..." tickets range from \$20 to \$0.

*User fee/entertainment tax*

None

*Center role*

The Center acts as presenter or co-presenter (98 out of 606 performing events, or 16%) and rental house, producing none of its own events. Primary tenants produce/present roughly 60% of total events, with other rentals comprising the balance. (Total events at Center: 2,664)

*Marketability of event types*

The marketability of any of the described events is obviously influenced by the name recognition of any particular performing group or artist. Louisville audiences generally respond well to big-name artists and groups, and are not inquisitive about lesser known performers. Rankings reflect average marketability, using a scale of 1 (lowest) to 5 (highest). NA reflects a type of event not presented or produced in the facility.

A concert by the local symphony	3.0
A concert by a major visiting symphony	4.5
A chamber music concert or a recital	2.0
A performance by a local opera company	4.0
A performance by a visiting opera company	NA
A current Broadway musical, such as "A Chorus Line" or "Cats"	5.0
A play by a professional theatre company	4.0
A current Broadway drama such as "Steel Magnolias" or "Driving Miss Daisy"	5.0
A play presented by a local community theatre group	1.0
A children's theatre performance	3.5
An experimental or avant garde play	1.0
A performance by a local ballet company	4.0
A performance by a visiting ballet company	4.0
A performance by a modern dance company	1.0
A one-man show, such as Hal Holbrook as Mark Twain	5.0
A comedy act, such as Jay Leno	5.0
A musical performance by a popular artist such as Frank Sinatra or George Benson	5.0
A jazz concert	1.0
A rock concert	NA
A country and western concert	1.0

students from across the state in a summer residential program

- Ride to the Center: provides matching grants to help distant Kentucky school districts send field trip buses to Center events
- Arts Education Showcases: series of one-day events across the state where educators can view examples of educational arts and cultural programs available locally and learn how to better utilize these programs in their schools. Participants receive an Arts Resource Directory (prepared by Center staff) which provides further information on artists and arts programs featured in the showcases.
- Outreach: Center staff coordinates and partially funds educational programs and tours of resident companies, both at the Center and throughout the state (Kentucky Opera, Louisville Ballet, Louisville Orchestra, Louisville Theatrical Association, Stage One: Louisville Children's Theatre). Staff also works closely with Kentucky Educational Television to provide coverage of programming to all schools.

*Programs for special constituencies*

Louisville has a minority population of 18%. The Center currently has a Cultural Diversity Program which is targeted at black audiences. This program is being rethought, however, as the idea of segregating this programming to a separate series is evaluated. High quality black artists draw equally well from both white and black audiences, and current thinking is that all programming should be targeted at all audiences.

The Center is totally handicapped accessible, and special services are available for the visually and hearing impaired. In addition, there is a specific usher program for physically handicapped people, with special care being taken to help them to their seats.

*Local facilities for multi-cultural/ethnic activities*

In addition to the Macauley Theater, which has a black theater company as its primary user, these activities are generally presented only in bars. Occasionally a minority artist (rock or pop musician, for example) is presented at Memorial Auditorium.

*Neighborhood facilities* None who present arts activities (Parks & Recreation has some neighborhood facilities, but they do not present arts events.)

*Regional programming* Since the Center is the state's performing arts center, there is considerable effort invested in making the programming of the Center available throughout the state. Kentucky Educational Television (KET) provides extensive television coverage of programming at the Center, with both live and taped performances. Working with KET, the Center provides programming at every school in the state. The Center also helps in touring some of the events presented at the facility, through coordinating and initiating regional booking and through providing financial support for some touring costs (as with tours of Louisville Children's Theater performances.)

*Public/private partnerships* Initial building costs for the Center, which opened in 1983, were \$32.5 million. The state provided \$23.5 million of these funds. The state also continues to provide substantial operating support to the Center (state funding is generally for specific items, such as heat and other utilities, school programming, television programming, and capital improvements.) The Center also receives revenue from a 1% transient room tax levied by Jefferson County. The Center is managed by an independent nonprofit corporation, however, and is not a state agency. The Center receives no support from the City of Louisville.

*Income for most recent FY* \$4,882,187 (including \$289,743 transferred from Kentucky Center for the Arts Endowment Fund, Inc.)

<i>Sources of this income</i>	<b>Earned Income</b>		
	Programming	\$1,113,737	
	Facility rentals	1,589,667	
	Concessions	154,079	
	Retail	344,970	
		<u>3,202,453</u>	66% of total
	<b>Public Support</b>		
	Room tax proceeds	937,137	19% of total

	<b>Contributed Income</b>		
	Gifts and grants	135,596	
	Membership revenue	176,623	
		<u>312,219</u>	6% of total
	<b>Interest/Other</b>		
	Transfer from Endowment	289,743	
	Interest and other	140,635	
		<u>430,378</u>	9% of total
<i>Expenses for most recent FY</i>	\$4,692,558		
<i>Personnel costs for most recent FY</i>	43% (includes salaries, benefits and fringe)		
<i>Major user involvement in policy</i>	None, and none is being considered. Involvement by constituent users in Center policy development and management is considered inappropriate.		
<i>Geographic area served (over 60% of audience drawn from this area)</i>	Within 80-100 miles of Louisville (although mandate is to serve entire state, and efforts are made to achieve this)		

## Tennessee Performing Arts Center

### *Nashville, Tennessee*

*Facility description*

The Tennessee Performing Arts Center (TPAC) consists of 250,000 square feet, with the following performing facilities:

**Jackson Hall:** seats 2,442, multi-purpose proscenium stage with full fly loft and orchestra pit

**Polk Theatre:** seats 1,050, full proscenium with orchestra pit, primarily used for theatre and chamber music

**Johnson Theatre:** seats 300, flexible black box with no fly

*Other local performance venues*

**Academy Theatre:** seats 1,200

**War Memorial Auditorium:** seats 1,800

**Grand Ole Opry:** seats 4,400

**Municipal Auditorium:** seats 9,000, used primarily for sports and pop music concerts

**Middle Tennessee State Arena:** seats 14,000, similar in use to Municipal Auditorium

**Vanderbilt Langford Auditorium:** seats 1,600, used primarily for University programming

*Primary tenants*

**Jackson Hall:** Nashville Symphony, Nashville Opera and Nashville Ballet "Nutcracker"

**Polk Theatre:** Nashville Ballet, Tennessee Repertory Theatre, Friends of Music (chamber music group)

**Johnson Theatre:** Circle Players

In addition, the Actors' Studio Conservatory, a training program, regularly uses rehearsal space at the Center.

*Other uses*

The Center had 356 public ticketed performances in 1990 presented/produced by primary tenants, by TPAC, and by renters. In addition, there were numerous nonperformance uses, including conventions, seminars, corporate meetings, and filming of music videos.

*"Dark" periods*

Summer is generally the quietest period for the Center, and is the period during which maintenance is done (season generally runs September through June 15). Summer 1991, however, "Cats" and "Les Miz" are being presented.

NA reflects a type of event not presented or produced in the facility.

A concert by the local symphony	4.0
A concert by a major visiting symphony	NA
A chamber music concert or a recital	3.0
A performance by a local opera company	3.0
A performance by a visiting opera company	3.0
A current Broadway musical, such as "A Chorus Line" or "Cats"	5.0
A play by a professional theatre company	4.0
A current Broadway drama such as "Steel Magnolias" or "Driving Miss Daisy"	4.5
A play presented by a local community theatre group	3.0
A children's theatre performance	3.5
An experimental or avant garde play	2.0
A performance by a local ballet company	3.0
A performance by a visiting ballet company	3.0
A performance by a modern dance company	2.0
A one-man show, such as Hal Holbrook as Mark Twain	2.5
A comedy act, such as Jay Leno	4.0
A musical performance by a popular artist such as Frank Sinatra or George Benson	4.0
A jazz concert	3.5
A rock concert	5.0
A country and western concert	4.0
A concert of ethnic music or dance	2.0

*Marketing efforts to users*

There is a production and sales staff of 2, who are responsible for marketing the facility. This marketing includes advertisements in trade publications ("Auditorium and Arena", "Cavalcade of Acts and Attractions") as well as personal contact with previous users.

*Marketing efforts for audience*

There are 6 staff people in marketing/sales, who carry out a traditional marketing plan of direct mail, paid advertising, television and radio promotion, etc.

*Marketing efforts for tourists*

Little effort has been made to attract tourists to TPAC until recently since the demographics of Nashville tourists have not been those of people disposed to attend arts events. Recently, tourist demographics in Nashville have changed, and this summer (since most of Nashville's 16 mil-

---

<i>Estimated budgets of major users</i>	Nashville Symphony: \$3.5 million Nashville Opera: \$700,000 Nashville Ballet: \$1 million Tennessee Repertory Theatre: \$2 million Friends of Music: \$200,000
<i>Rate schedule</i>	<p>The rate structure offers different rates for for-profit, non-profit and video users. (Video rates are dependent on number of people involved and type of activity.) In general, there is a 10% discount on rental rates for multiple dates. Support services are provided free of charge to resident companies.</p> <p>Actual rate schedules are available separately and are not bound with this report.</p>
<i>Total attendance for most recent FY</i>	367,151
<i>Price ranges for tickets</i>	Ticket prices for Broadway shows, the Opera and the Symphony range from \$10 to \$39 (Broadway tickets are generally most expensive). Tennessee Repertory Theatre prices range from \$10 to \$25. Circle Player prices range from \$5 to \$15.
<i>User fee/entertainment tax</i>	There is a State Amusement Tax of 7.75% on gross ticket sales for all events for which admission is charged. Ticket prices include this tax, which is the responsibility of the producer/presenter to pay. Over the last five years, TPAC has paid \$1.2 million to the state for this tax on its own ticketed events.
<i>Center role</i>	The Center acts as primarily as presenter or co-presenter and rental house, rarely producing its own events (TPAC produced one event in the last three years). TPAC-presented performances are about 1/3 of all performances, and generally include Broadway shows, family entertainment or other non-classical programs to avoid competition with resident company programming. The balance of usage is rentals.
<i>Marketability of event types</i>	The marketability of any of the described events is obviously influenced by the name recognition of any particular performing group or artist. Rankings reflect average marketability, using a scale of 1 (lowest) to 5 (highest).

lion tourists visit in the summer) programming is being offered that will be attractive to tourists ("Cats" and "Les Miz"). TPAC staff is working with the Chamber of Commerce, tour groups and hotels to market these events.

*Education programs*

TPAC has an extensive education program entitled Humanities Outreach in Tennessee (HOT). This program brings in over 60,000 school children annually to see opera, ballet, theatre, and orchestral music. The program is a curriculum based program, with materials developed in cooperation with the State Department of Education and teachers. Study guides are provided to teachers for use in the classroom prior to performances, and seminars with performers and technicians are offered immediately following performances. HOT also offers financial assistance for transportation costs. In the FY 90/91 season, ten HOT events were offered (during school hours) at a ticket price of \$4.

HOT also tours events across the state. For example, in a joint project with Metro Nashville Arts Commission, actors from the Acting Studio Conservatory traveled to 25 schools throughout the mid-state region to perform and involve students in an intimate theatre experience.

The annual budget for HOT is \$500,000, with \$100,000 coming from state government, \$200,000 from ticket sales, and the balance contributed by corporations and individuals. HOT has a staff of 4.

*Programs for special constituencies*

TPAC offers discounted tickets to senior citizens to encourage their attendance at events. Beginning FY 1991/92, TPAC is presenting some events to attract minority audiences as part of the regular programming (Nashville population consists approximately of 20% black, 1% Hispanic, and the balance white).

*Local facilities for multi-cultural/ethnic activities*

None

*Neighborhood facilities*

Jewish Community Center: community center in Nashville which offers arts programming

*Regional programming*

TPAC does outreach to people living within 100 miles of Nashville through direct mail, local newspapers, and other



media advertising. There is no regional programming other than the touring of educational programs described above.

*Public/private partnerships*

TPAC was created through a partnership between the state and a group of local citizens. The state funded the construction of the facility, which opened in 1980. (The Center is part of a building complex with the Tennessee State Museum and the State Office Tower.) The state provides free office space, major maintenance and utilities. The state also provides \$100,000 in support of the educational programming of TPAC. Since unrestricted operating funds were not available from the state, the private citizen group raised a \$4 million endowment, the interest from which helps cover operating costs. The City of Nashville provides little support to the Center (\$4,000 this year in support of the educational programs).

*Income for most recent FY*

\$4,991,216

*Sources of this income*

**Earned Income**

Ticket sales	\$2,492,872	
Space rentals	653,434	
Ticketmaster fees	689,528	
	<u>3,835,834</u>	77% of total

**Contributed Income**

Grants and gifts	360,276	7% of total
------------------	---------	-------------

**Interest/Other**

Endowment income	579,000	
Other	216,106	
	<u>795,106</u>	16% of total

*Expenses for most recent FY*

\$5,268,942

*Personnel costs for most recent FY*

29%

*Major user involvement in policy*

None, and none is being considered. The state charter requires this independence. In fact, when originally conceived, the facility was to serve the entire state, and there were to be no resident companies. This philosophy has evolved as the Center has been in operation, but the inde-

pendence of the governing entity from potential conflict of interest situations has remained.

*Geographic area served* Region within 100 miles of Nashville (although people do  
*(over 60% of audience* come from as far as Louisville, KY or Birmingham, AL)  
*drawn from this area)*

Portland Center for the Performing Arts

*Portland, Oregon*

*Facility description*

The Portland Center for the Performing Arts (PCPA) consists of three buildings with four theatres as follows:

**Portland Civic Auditorium:** seats 3,000, proscenium stage with full fly loft

**Arlene Schnitzer Concert Hall:** seats 2,700, proscenium stage with full fly loft (renovated movie palace)

**Intermediate Theatre:** seats 900, proscenium stage with full fly loft

**Winningstad Theatre:** seats 340, Elizabethan style theatre with flexible floor space and stage rigging at one end

The Intermediate Theatre and the Winningstad Theatre are housed in the New Theatre Building, which also includes a restaurant, administrative offices for PCPA, and offices for Oregon Shakespeare Festival/Portland. In addition, there is an incomplete multi-purpose studio space for which PCPA is exploring avenues for funding to complete (approximately \$900,000 required).

*Other local performance venues*

**Memorial Coliseum:** seats 13,000, used for sports, rock music, and other major events (Disney on Ice, etc.)

**University of Portland Theatre:** seats 400, used for dance series and university events

**Mt. Hood Community College amphitheater:** seats 10,000, outdoor facility used for Mt. Hood Jazz Festival

**Fox Theatre:** seats 1,200-1,400, former movie theatre

**Echo Theatre:** seats up to 300, converted warehouse with flexible seating, used primarily by Do Jump Dance Company (local dance company and presenter) and other local organizations

*Primary tenants*

**Civic Auditorium:** Oregon Ballet Theatre, Portland Opera Association, Music Theatre Oregon (produces Broadway revivals), Oregon Children's Theatre

**Schnitzer Concert Hall:** Oregon Symphony, Portland Youth Philharmonic, Royal Cavalcade (travelogue series)

**Intermediate Theatre:** Oregon Shakespeare Festival (October through April)

	Winningstad Theatre: New Rose Theatre, Tygress Heart Shakespeare Co., Tears of Joy (puppet theatre)
<i>Other uses</i>	In addition to uses by major tenant organizations (57%) and other local performing arts groups (14%), the facilities are used by commercial promoters for rock concerts and "middle of the road" shows (19%) and for non-performing events (10%) including graduations, business meetings, lectures, film presentations, and lobby functions and receptions.
<i>"Dark" periods</i>	Summer is generally the quietest period for PCPA, (especially August) and is the period during which maintenance is done.
<i>Estimated budgets of major users</i>	Not available from PCPA
<i>Rate schedule</i>	Major tenant organizations do not get a special rate for rental of facilities. If any renter grosses over \$45,000 in ticket sales, they must pay 8% of the amount over \$45,000 (5% for nonprofits not acting as a presenter) to the Center.  Actual rate schedules are available separately and are not bound with this report.
<i>Total attendance for most recent FY</i>	865,311
<i>Price ranges for tickets</i>	Not available from PCPA
<i>User fee/entertainment tax</i>	There is a user's fee charged by the Metropolitan Exposition-Recreation Commission (MERC) on all tickets sold for public events at PCPA as follows: \$.50/ticket for tickets under \$10.00, \$1.00/ticket for tickets \$10.00 to \$21.99, \$1.50 for tickets \$22.00 and up. This user fee is included in all ticket prices.
<i>Center role</i>	The Center acts solely as a rental house, neither producing nor presenting its own events.
<i>Marketability of event types</i>	The marketability of any of the described events is obviously influenced by the name recognition of any particular performing group or artist. Rankings reflect average marketability, using a scale of 1 (lowest) to 5 (highest).

NA reflects a type of event not presented or produced in the facility.

A concert by the local symphony	5.0
A concert by a major visiting symphony	NA
A chamber music concert or a recital	1.0
A performance by a local opera company	5.0
A performance by a visiting opera company	NA
A current Broadway musical, such as "A Chorus Line" or "Cats"	5.0
A play by a professional theatre company	3.5
A current Broadway drama such as "Steel Magnolias" or "Driving Miss Daisy"	NA
A play presented by a local community theatre group	2.0
A children's theatre performance	5.0
An experimental or avant garde play	NA
A performance by a local ballet company	3.5
A performance by a visiting ballet company	3.5
A performance by a modern dance company	3.5
A one-man show, such as Hal Holbrook as Mark Twain	5.0
A comedy act, such as Jay Leno	5.0
A musical performance by a popular artist such as Frank Sinatra or George Benson	4.0
A jazz concert	4.0
A rock concert	5.0
A country and western concert	3.5
A concert of ethnic music or dance	NA
Novelty act/family entertainment	5.0

*Marketing efforts to users*

There is a marketing staff of 4 (including 1 clerical support person). Marketing efforts to promote rental of facilities are fairly minimal, since there are relatively few open dates (except for summer). Efforts are basically limited to advertising in professional journals.

*Marketing efforts for audience*

The same marketing staff handles audience marketing efforts, which consist of a bi-monthly calendar listing all events at PCPA, an electronic sign outside the theatre listing current events, and a regular advertisement in the Sunday *Oregonian* which promotes current activities by users paying to participate.

---

<i>Marketing efforts for tourists</i>	In conjunction with the Memorial Coliseum and Civic Stadium, PCPA events are promoted in a special entertainment tabloid ("Applause") that is distributed through the facilities, hotels and motels, visitors' associations, and retail outlets. In addition, PCPA purchases advertising in tourist publications.
<i>Education programs</i>	PCPA currently has no educational programming, although most of the major tenant organizations have their own. PCPA is currently examining what its role should be in this area.
<i>Programs for special constituencies</i>	None, although major tenant organizations do some special programming (for example, Portland Opera Association has an open dress rehearsal with substantially discounted tickets for senior citizens and students).
<i>Local facilities for multi-cultural/ethnic activities</i>	<b>Interstate Firehouse Cultural Center:</b> city owned and funded facility located in a primarily minority neighborhood which includes a theatre seating 110, a dance studio and a gallery. There is a theatre company in residence in the facility, and the facility is used by other local performing arts groups, including the Northwest Theatre of the Deaf. The facility is also used for wedding receptions and neighborhood association meetings.
<i>Neighborhood facilities</i>	<b>Metro Performing Arts</b> consists of performance and training programs at various neighborhood facilities operated by Portland Parks and Recreation. These facilities include the following: <ul style="list-style-type: none"><li>• 4 rooms at Rice School for a dance program</li><li>• Carousel Courtyard Theatre - private theatre in a commercial real estate development at which there is a Children's Theatre program</li><li>• Mt. Tabor Annex - old grade school; will be closed</li><li>• Laurelhurst Dance Studio - one room facility for dance</li><li>• Eastside Performance Center - high school building with auditorium used for performances in conjunction with the Portland Public Schools</li><li>• Firehouse Theatre - converted firehouse used for performances and office space</li></ul>

Due to recent and potential budget cuts to Portland Parks and Recreation, the continued operation of several of these facilities is in question.

*Regional programming* None

*Public/private partnerships*

PCPA is a governmental entity under the jurisdiction of the Metropolitan Regional Authority (METRO). The first steps toward the creation of PCPA were the renovation (funded by the City of Portland) and re-opening of the Civic Auditorium in 1968 and the Schnitzer Concert Hall (formerly the Paramount Theatre) in 1984/5, which were placed under the jurisdiction of the City's Commissioner of Public Affairs. The City constructed the New Theatre Building in 1987 using a \$19 million GO bond, \$6 million of other city money, and \$10 million from the private sector. PCPA was initially under the jurisdiction of the City's Exposition-Recreation Commission, but was transferred to the Metropolitan Exposition-Recreation Commission (MERC), a commission of METRO, in 1990. PCPA pays METRO and MERC for services, including insurance, maintenance, and some administration costs. In return, MERC covers PCPA operating deficits through profits generated at the Memorial Coliseum.

*Income for most recent FY*

\$2,573,258 (operating revenues, including \$790,000 transfer from City Coliseum Fund)

*Sources of this income*

<b>Earned Income</b>		
Rentals	\$884,941	
User fees	370,408	
Commissions	179,417	
Concessions/merchandizing/ catering	193,280	
	1,628,046	63% of total
<b>Public Support</b>		
Coliseum Fund*	790,000	31% of total
<b>Interest/Other</b>		
Other	155,212	6% of total

\*Note that these funds are earned revenues transferred from City Coliseum Fund.

*Expenses for most recent FY* \$3,469,982

*Personnel costs for most recent FY* 68% (This percentage is relatively high due in part to the fact that PCPA is exclusively a rental house, with no presenting or producing costs.)

*Major user involvement in policy* None. PCPA policy is established by MERC. There is an advisory committee which was established as part of the transition from City management, but its role is as yet unclear.

*Geographic area served (over 60% of audience drawn from this area)* City of Portland



## Appendix C Model Programs in Identified Areas of Concern

During the spring of 1991, consultants from The Wolf Organization, Inc. conducted a planning project for the City of Portland, Oregon to develop a community cultural plan. As part of that project, the consultants identified model programs in identified areas of concern for the Portland community. Descriptions of the model programs are provided in the following Appendix.

## Facilities and Programs for Multi-Cultural Activities

### *Carver Community Cultural Center* *San Antonio, Texas*

#### **Program description**

Founded in 1905 to provide a refuge from flooding as well as a library and educational center, The Colored Community House was originally located in a small house in downtown San Antonio. The house was moved to the current location of the Center, also in downtown San Antonio, in 1919 and an adjacent building was built for public assemblies. In 1929, the old facilities were demolished and a new complex was erected by the City of San Antonio, The Carver Library Auditorium (originally called The Colored Library Auditorium), which served as a focal point for activities in San Antonio's black community, including debutante balls, educational forums, banquets, graduations, political meetings, and performing arts presentations. In the 1970's, the building, which had become run-down and less used, narrowly escaped demolition. Succumbing to community pressure, the City agreed to renovate the facility, and in 1977 it was rededicated as The Carver Community Center. In 1986, a new complex, based on renovated existing space and new construction, was opened (funded through a Community Development Block Grant), and a 10,000 square foot outdoor area was developed into a Heritage Garden, which opened in 1991. The Center recently purchased the adjacent church, which will be renovated to house workshops in the performing arts, performances, meetings receptions, and other activities.

The Cultural Center complex includes administrative offices, a gallery, a 650 seat theatre, production areas, dressing rooms, equipment storage areas, a dance studio, a full kitchen, a set shop, wardrobe, laundry and sewing rooms, a ceramic studio, and the Heritage Garden.

Current programming of the Carver includes an annual season of performing and visual arts events (50 performances, 24 art exhibitions, numerous presentations of local artists, and a diverse series of hosted events), children's dance classes, ceramic classes for children and adults, and numerous other community activities. Events presented by the Center have a multi-national, multi-cultural focus, including in 1990/91 a ten day African-Caribbean Festival. The Center is also available for rental by local organizations and community groups.

The Center is an agency of city government, with an affiliated nonprofit organization for fund raising.

#### **Budget for FY 90/91**

\$1.1 million (budget for FY '91/92 will be \$850,000, as there will be no African-Caribbean Festival)

- *Hispanic Dance Program*: performances and classes offered by resident dance company, Performance Company.
- *Publications*: publication of TONANTZIN, a program and information booklet in conjunction with major events; a monthly newsletter to apprise members of events and developments at the Center; and The Guadalupe Review (fall 1991), a multi-cultural journal of contemporary literature.

**Budget for most recent FY**  
Over \$1.25 million

#### **Sources of funding**

City of San Antonio, Texas Commission on the Arts, Texas Committee on the Humanities, National Endowment for the Arts, corporate, foundation, and individual contributed support, memberships, ticket sales, class registration fees.

### *Baltimore American Indian Center, Inc.* *Baltimore, Maryland*

#### **Program description**

The Baltimore Indian Center was established in 1968 to assist all Native Americans living in the metropolitan Baltimore area in achieving personal self-sufficiency by helping to find solutions to their needs and problems. The purpose of the Center is also to help Indian people understand and appreciate their own culture and background.

The Center was founded in 1968 by a group of Native Americans who had settled in a section of Baltimore and who felt the need to create a community support center. Originally funded under various federal programs, the Center was housed in a local church. The initial facility for the Center was a building donated by the Catholic Church. The Center is now located in a 3 story building with 4,000 sq. ft. of space, including community meeting rooms, office space, and classroom space. The Center currently owns a total of 9 buildings, including 3 apartment buildings and one single family house which are rented primarily to Native Americans moving to the area. One of the buildings houses a small museum, and another houses a day care facility and senior citizen center. Some of the buildings were donated to the Center, and some were purchased through funds accrued through the baseball concession program (see section on sources of funding).

The Center provides direct relief and service to Native American individuals and families through programs of community service, economic development (business assistance), job placement, senior citizen activities, cultural programming (including an annual Pow Wow, a Native American Cultural Arts Festival, and classes in dancing, drumming and Indian arts and crafts), educational programming (G.E.D.

### Sources of funding

Funding for the Center is from ticket sales, the National Endowment for the Arts, the Texas Commission for the Arts, the City of San Antonio, and private contributions (through the affiliated nonprofit).

## *Guadalupe Cultural Arts Center* *San Antonio, Texas*

### Program description

Founded over ten years ago with the banding together of three local arts groups, the Guadalupe Cultural Arts Center is a community arts center dedicated to the preservation, development and promotion of Mexican-American arts and to presenting activities that bring about a greater appreciation of other Latino and Native American artistic impressions. Activities at the Center are designed to provide opportunities for community involvement, with numerous free or low cost activities. The facility is located in the renovated Guadalupe Theater, which was adapted from a traditional theater space to a multi-purpose space, with removable seats, a dance floor, a stage house, props storage space, and a gallery.

Programs are presented in the following areas:

- *Visual Arts Program*: includes classes for adults and children, management of an art gallery presenting exhibitions of local, national and international artists, an annual Juried Women's Art Exhibit, an arts and crafts bazaar, advanced workshops for professional artists, and roundtable discussions for artist information exchange.
- *Chicano Music Program*: includes music and instrument instruction, as well as the Tejano Conjunto Festival of traditional conjunto music (held at various locations throughout San Antonio) which draws an international audience and has been recorded live for public sale.
- *Literature Program*: includes creative writing classes and workshops by local and visiting Chicano writers and poets, the Lumbre Writers series which brings in major writers and poets for extended residencies, and the Inter-American Book Fair, which brings publishers, writers and poets to San Antonio for a major literary event.
- *Theatre Arts Program*: presents a series of four plays each year by a resident acting company, Los Actores de San Antonio, and offers summer classes in dramatic arts for children.
- *Teatro Guadalupe*: includes an annual CineFestival, a week-long festival of feature films, documentaries, and videotape productions from the United States and Latin America; various film series of non-commercial films; free classic Mexican movies presented for senior citizens and in an outdoor summer film series; and a performing arts series.

tutoring), a youth program (including Soaring Eagles Youth Group, Baltimore Orioles baseball concessions training, employment and classroom training), a drug and alcohol prevention program, and a housing program.

**Budget for most recent FY**  
\$1.2 million

**Sources of funding**

U.S. Department of Labor funding, earned income from concessions at Oriole baseball games (special program sub-contracted from company handling full concessions at the baseball field), Baltimore United Way, city and state support, Indian Health Service funding, Administration for Native Americans funding, and Office of Indian Education funding.

*Metropolitan Dade County Cultural Affairs Council*  
*Miami, Florida*

**Program description**

The Metropolitan Dade County Cultural Affairs Council has several programs that are intended to serve multi-cultural constituencies, including the following:

- *Hannibal Cox Cultural Grants Program*: grants program which provides general operating support and/or project support funding and technical assistance to small and mid-sized organizations with budgets between \$100,000 and \$500,000 (Category I) and to emerging or ethnic organizations with budgets of less than \$100,000 (Category II)
- *Community Grants Program*: grants program which provides project support to any Dade County nonprofit organization that has projects or events with strong community involvement and/or outreach. Since Dade County has such a high percentage of ethnic/minority populations, the majority of these grants go to organizations serving multi-cultural constituencies.
- *Cultural Advancement Grants*: operating support to mid-size performing arts groups and presenting organizations (budgets of between \$50,000 and \$250,000) with a history of high artistic quality, combined with marketing support and technical assistance for the grantee groups. Purpose of the program is to increase organization stability. Also funds substantial (\$15,000) visual and media artists fellowships aimed at increasing professional development of individual artists. 80% of groups currently funded are either multi-cultural or minority organizations themselves or provide a high percentage of their programming to multi-cultural or minority audiences.

- *Black Cultural Arts Coalition* (name to be changed to Multi-cultural Arts Coalition): Under the leadership and coordination of a Council staff person, a group of artists and administrators from multi-cultural arts organizations in Dade County have formed a coalition which produces a newsletter, coordinates events, plans joint projects, serves as an advocacy group, and co-sponsors technical assistance workshops with the Council and with other community groups.
- *Marketing*: Marketing staff for the Council have arranged for South Florida Magazine to profile a different minority arts organization each month. This series is based on a similar series the Council did last year in the *Miami Herald*. Marketing staff also coordinates a general program of cultural marketing which includes paid and community service multi-media joint marketing campaigns (television, radio, newspapers) and the publication of collateral materials including brochures and magazine insert sections. Since this service markets all local arts activities, it includes a large number of multi-cultural events and organizations, and participating newspapers include the two major minority newspapers, *El Nuevo Herald* and the *Miami Times*.

#### Budget for FY '91

*Hannibal Cox Cultural Grants*: \$233,000

*Community Grants Program*: \$423,000

*Cultural Advancement Grants*: \$285,000 (year 1 of a 4-year NEA Challenge III grant)

*Black Cultural Arts Coalition*: \$13,500

*Marketing*: \$27,500 plus substantial in kind contribution by local media (excludes administration and \$19,000 for marketing efforts included as part of Cultural Advancement budget)

#### Sources of funding

*Hannibal Cox Cultural Grants*: County Tourist Development Room Tax and County General Funds

*Community Grants Program*: County General Funds

*Cultural Advancement Grants*: National Endowment for the Arts, Dade County Tourist Development Room Tax (increased collections, which qualifies as new revenues), Broward County Tourist Development Room Tax, and Miami Beach Tourist Development Room Tax

*Black Cultural Arts Coalition*: County Tourist Development Room Tax, membership fees, contracted services, and corporate contributions

*Marketing*: County Tourist Development Room Tax, Greater Miami Convention and Visitors Bureau funds, in kind contributions by media, and contributed services by agencies, designers and artists

## Programs for Low Income Populations

### *Neighborhood Arts Program* Chicago Department of Cultural Affairs

#### **Program description**

The Neighborhood Arts Program (NAP) is a granting program of the Chicago Department of Cultural Affairs, the purpose of which is to encourage and support the presentation of high-quality instructional arts projects to benefit youth, elderly and disabled participants in Chicago's low and moderate income neighborhoods. Artists who live and/or work in these neighborhoods may request up to \$4,000 in funding support for workshops and classes at Chicago Housing Authority housing sites, community centers, facilities serving the elderly or disabled, or at elementary and secondary school locations. Activity sites must be located in low/moderate income community areas designated for Community Development Block Grant funding, and DCA staff may assist grantees in determining site locations. Applicants must be individual professional and practicing artists of outstanding talent and demonstrated ability who are at least 21 years of age and are Chicago residents. Priority is given to quality proposals demonstrating the potential to stimulate ongoing community activities. Recent projects funded include:

- a musician teaching children to play mariachi at the Mexican Fine Arts Center
- a play-writing workshop with seniors at a senior center, using biographical stories of workshop participants
- a theatre workshop with disabled students at a local school.

**Budget for most recent FY**  
\$96,000 (excluding administrative costs)

#### **Funding sources**

All funds distributed through this program are Community Development Block Grant funds. Administrative costs (including staff) are included in Department of Cultural Affairs administration costs paid for by the City of Chicago.

### *Cathedral of St. John the Divine* New York, New York

#### **Program description**

The Cathedral has developed several programs that serve special constituencies in the community of the church, with the ultimate goal of infusing the arts throughout society. These programs include:

- *Artist residencies*: artists are placed in residence at homeless shelters or transitional shelters to work with residents. For example, a dancer choreographed a dance using children at a homeless shelter, culminating in a performance. This program indirectly involved parents as well, as they were drawn in by the enthusiasm of the children. Another dancer/choreographer did a residency at a shelter working with women in transition, with the resulting dance, based on their individual stories, being performed by the participants to much acclaim.
- *Concerts in schools*: the Cathedral works with local schools in Harlem to present multi-cultural artists reflective of the cultural heritages of the school children (African, Caribbean, Hispanic) in performances at the schools. This program is intended to introduce these children to their cultural backgrounds, of which many are unaware.
- *Ticket purchase program*: ticket flyers to events at the Cathedral suggest that an additional ticket be purchased to be contributed to a designated special group, such as homeless people, people with AIDS, or other indigent groups. This program generates from 20 to 100 tickets per event for these identified groups.
- *Stoneyard Apprenticeship Program*: the Cathedral sponsors an apprenticeship program to teach people how to cut and carve stone. All participants in the program are lower income or people off the street. Apprentices receive an annual stipend for participating. This program now has more applicants than it can handle, through word of mouth publicity.
- *Manhattan Valley Program*: program to teach minority youth how to get and keep jobs, also provides counselling services. As part of this program, participants organize and present their own arts events (concerts, fashion show), which gives them the satisfaction of creating and realizing a project, as well as teaching them technical skills that can be transferred to paid employment (in the recording industry, for example).

#### Budget for most recent FY

Arts and cultural programming budget at the Cathedral is approximately \$1.4 million, which includes artist residencies, concerts in schools, and ticket purchase program, as well as a full schedule of presented arts events. Costs for the various outreach programs are difficult to identify as they are incorporated into other programming efforts. Prices on residencies may be as high as \$30,000 for one residency, which includes all production and marketing costs for the culminating performances. The Stoneyard Apprenticeship Program has an annual budget of \$1.8 million, and the Manhattan Valley Program has an annual budget of \$1.5 million. The Stoneyard and Manhattan Valley Programs are independent from the



arts and cultural programs, although all are programs of the Cathedral and they frequently collaborate on projects.

**Sources of funding**

The artist residencies are frequently paid for by the shelters in which the programs take place. School programs are funded by the New York State Council on the Arts or other traditional funding sources. The Stoneyard and Manhattan Valley Programs are funded by city and state training grants for homeless and other indigent people.

## Regional Activities

### *Cultural Facilities District* *Denver, Colorado*

#### Program description

In November, 1986 voters in a six county metropolitan district surrounding Denver approved a sales tax of .10 of one percent (10 cents on each \$100 purchase, implemented in May, 1987), creating a Cultural Facilities District which provides funding for the region's zoo, museums and performing arts programs. The District includes Boulder, Denver and Jefferson counties, as well as parts of Adam, Arapahoe and Douglas counties. Organizations receiving funding through this program are divided into three groups, based on their finances, attendance, and overall servicing of the region:

- 65% of the funds are distributed to the Natural History Museum, the Denver Zoo, the Denver Art Museum and the Botanic Garden.
- 25% of the funds are distributed to programs with budgets over \$700,000 such as the Denver Center for the Performing Arts, the Denver Symphony, the Arvada Center, the Children's Museum, Central City Opera, Opera Colorado and the Colorado Ballet. Other organizations can qualify as their budgets grow.
- 10% of the funds are distributed by cultural councils within each county. Funds are distributed to the councils in proportion to each county's sales tax contribution.

The District has a nine-member governing board, with three members appointed by the Governor and one from each of the six counties. Board members receive no compensation. There is also one staff person, paid from the .75 of 1 percent of funds allowed for administration. The tax has generated \$15 million for each of the last two years, a higher figure than had been anticipated in the initial planning for the District.

Key to voter approval of this District was the emphasis on "a little bit from everybody" (estimated at about 57 cents per person per month, or "the cost of a cup of coffee".) There was also great emphasis on the benefit to the region — for children, for cultural institutions, for the economy (tourism), for service to suburban residents.

**Budget for most recent FY**  
\$15 million

**Funding sources**  
Sales tax of .10 of one percent

*Metropolitan Dade County Cultural Affairs Council*  
*Miami, Florida*

**Program description**

With administrative support provided by the Council, five arts councils from the Miami region have formed the South Florida Cultural Consortium (Palm Beach, Broward, Dade, Monroe and Martin Counties). Programs of this coalition include participation in the Artist Fellowship program of Cultural Advancement Grants (including soliciting applications and contributing financial support - see "Programs for Multi-Cultural Constituencies" above for more detail on this program), joint marketing efforts (such as current feature coverage of minority organizations in South Florida Magazine), and advocacy efforts (the Consortium has been working to generate support for a .35% surcharge or levy on hotel stays dedicated to support for cultural programs which is currently before the legislature). In addition, state funds through the Vital Locals Project are being solicited by the Consortium to expand regional marketing campaigns for the arts.

**Budget for FY '91**

*Artists Fellowships* (part of Cultural Advancement Grants): \$110,000

There is no funding for the Consortium beyond this granting program for FY '91. The Consortium was started five years ago with NEA Locals funding. This is the first year there has been no funding, and the counties have continued to work as partners. It appears that Vital Locals funding of \$85,000-\$95,000 will be available next year for the Consortium, with matching obligations from the participating counties.

**Sources of funding**

*Artists Fellowships* (part of Cultural Advancement Grants): National Endowment for the Arts, Dade County Tourist Development Room Tax (increased collections, which qualifies as new revenues), Broward County Tourist Development Room Tax, and Miami Beach Tourist Development Room Tax

*The Metropolitan Council*  
*St. Paul, Minnesota*

**Program description**

The Metropolitan Council is a designated regional arts council which serves the seven county region which includes the metropolitan area of Minneapolis/St. Paul and surrounding suburbs. The Council, which is currently part of municipal government, is in the process of establishing itself as an independent nonprofit, and the name will be changed to the Metropolitan Regional Arts Council. As the Council receives no direct funding from the municipality, this move will not have a major impact on organization funding.

Programming of the Council includes the following:

- *Sponsor and Presenter Grant Program*: provides project support to nonprofit organizations, schools, units of government or collaborations of three or more artists (using a fiscal agent). No organizations applying for Organizational Support at the Minnesota State Arts Board or with budgets over \$300,000 may apply for funding. In order to make this program accessible to the 7-county region served, informational meetings are held at community or neighborhood centers in several different locations throughout the region prior to application deadlines. In addition, information on the program is published in community newspapers throughout the region and panels for grant review include representatives from across the region served.
- *Publications*: includes "Art Town", a biennially revised guide to the arts in the 7-county service area, including information on organizations in arts education, arts services, arts centers, dance, ethnic and folk arts, film and video, literature, multidisciplinary arts groups, music, radio, theater and visual arts.
- *Forums and workshops*: series of 3-4 forums or workshops offered each year at different locations in the 7-county service area, occasionally in collaboration with other agencies. Topics covered in these workshops are selected to fill gaps in other professional development workshops offered in the region.
- *Technical Assistance*: staff provides individual assistance in areas of organizational development, including grant writing, budgeting, and other areas. Staff also acts as referral service to various professional development opportunities available in the region. Since many applicants to the Sponsor and Presenter Grant Program are relatively inexperienced in writing grants, substantial individual staff assistance is provided to applicant organizations.
- *Planning*: Every two years, the Council must submit a two-year plan to the State for consideration in the State's biennial budgeting process. The Council offers this plan for review at eight different locations throughout the region, with staff and board attending an open town meeting at each location to hear discussion on the proposed plan. This process allows the entire region served to be involved in planning agency programs.

Budget for FY '91  
\$539,000 (of which \$470,000 is regranted)

Sources of funding  
State of Minnesota

## Arts in Education

### *Huntington Arts Council* *Huntington, New York*

#### Program description

The Huntington Arts Council Arts in Education Program combines two interrelated projects whose themes are multi-cultural understanding: *The Journey Project* and *Imagination Celebration*.

*The Journey Project* is a sequential, cross-cultural exploration of the art, food, customs, myths, crafts and peoples of Africa, China, India, Latin America and Native Americans, with a strong emphasis on teacher participation in planning of projects. Program components include cultural arts workshops by artists for teachers and students (on topics such as Chinese calligraphy, Mexican backstrap weaving, African fabric stamping, Iroquois cornhusk crafts); "discovery chests" prepared by the Council with related and thematic cultural artifacts and curriculum materials (such as Chinese silk embroidery, Mexican basketry, African story cloths, ethnic toys, eating utensils, clothing); artist workshops in the classrooms (with artists selected by the Arts Council); artistic performances; creative art projects (which have included African masks, Chinese dragons, Egyptian mummies, an African adinkra print quilt, sand paintings); and culminating exhibits in a public setting. Artists selected by the Council for participation are actual representatives of the cultures they represent, the art that they demonstrate is of professional quality, they understand the goals of the program, and they must interact well with students. Currently eight school districts participate in this program. The program is planned, monitored and evaluated by an Arts in Education Task Force, composed of one administrator/liaison from each participating school district. Each year there is also an Annual Superintendent Partner Meeting to have participating school superintendents meet with Council staff for program updates and planning.

Related to *The Journey Project* is *Imagination Celebration*, a six week long series of family-centered activities which celebrate the multi-cultural diversity and creativity of the community and the world. All *Imagination Celebration* activities are free and open to the public. In 1990, the celebration included a multi-cultural dance company; an international gallery exhibit; a family concert by the Long Island Philharmonic Orchestra; Earth Day-related events including story-telling, playacting, and multi-cultural myths; a community-wide series of exhibits of students' multi-cultural arts projects (developed through *The Journey Project*); and a Celebrate Youth Day final event with activity booths, performances, participatory activities, and a multi-cultural fair.

#### Budget for most recent FY

\$75,000 (*Journey Project* and *Imagination Celebration*)

Sources of funding	
Participating school districts (8 districts contribute \$3,200)	\$25,600
<i>Imagination Celebration</i> (national and state funding)	\$25,000
Corporations and foundations	\$25,000

*Young Audiences' Arts Partners*  
*Kansas City, MO*

**Program description**

Arts Partners is a comprehensive arts in education program which integrates community arts resources into the curriculum of participating school districts. This is accomplished by the creation of a partnership team which includes representatives from school districts, community arts organizations, funders, and Young Audiences (a national arts in education organization which presents artists in schools to help establish the arts as an essential part of all children's education). Members of this partnership work together to create a kindergarten through twelfth grade curriculum which combines classroom study, field trips, performances, workshops, and residencies in the visual and performing arts.

Arts Partners was started in Kansas City in 1986 as a three-year pilot program, administered by Young Audiences and including 86 schools in four metropolitan school districts. Seven major arts organizations participated in the first year of the program. Funding was 1/3 from the participating school districts and 2/3 from a consortium of private funders, spearheaded by a local community foundation (which also acts as fiscal agent). Currently, funding is 3/4 from local schools districts and 1/4 from private funders, 10 local arts organizations participate, and the program is being used as a model nationally for collaborative arts in education programming.

Each of the four participating school districts has a specific curriculum agenda. Each also has its own Arts Partners Planning Team, composed of arts supervisors and representatives of other disciplines, which meets regularly with Arts Partners staff at Young Audiences. Arts programming options are organized and presented to these teams by Arts Partners staff, using the resources of Young Audiences and the other arts organization providers. The Arts Partners staff at Young Audiences work with artists and arts organizations to develop programs which meet the goals of the Planning Teams. Supporting services, including teacher in-service education, a summer institute, and curriculum materials are also developed and provided by Arts Partners staff.

The partnership is managed through the oversight of two committees: the Arts Partners Advisory Committee, composed of superintendents from the participating schools districts, representatives from funders, community leaders in arts or education, representatives from the Arts Partners Steering Committee, parent repre-

representatives, Young Audiences' Executive Director, and a member of the Young Audiences Board; and the Arts Partners Steering Committee, composed of one representative from each participating arts organization and Young Audiences' Arts Partners staff. All scheduling, coordinating, promotion and management of the program is by Young Audiences Arts Partners staff; fund-raising efforts are coordinated and managed by the local community foundation, which acts as fiscal agent for the program as well.

#### Budget for most recent FY

\$663,709 (FY '90) (FY '91 budget is an additional \$80,000, FY '92 budget is projecting a similar increase)

#### Sources of funding

Participating school districts:	\$423,144 cash plus \$36,995 in kind
Private support:	\$152,850
Missouri Arts Council:	\$10,100
Kansas Arts Commission:	\$14,400
Young Audiences salary support:	\$26,220

### *Cultural Resources Council* *Syracuse, New York*

#### Program description

The Cultural Resources Council, which serves as a local arts agency and a facility manager of the Civic Center in Syracuse, has an extensive series of arts in education programs, including the following:

- *CRC Institute for the Arts in Education*: summer workshops for teachers and school year training and repertory for students with an emphasis on aesthetics (based on the education programs of Lincoln Center). The purpose of the Institute is to assist teachers and students in developing their capacity to understand and enjoy the arts. Through Institute activities, teachers and their students become actively involved with the arts by observing, listening to, and discussing works of art, as well as exploring their perceptions of these works through participatory activities.
- *Arts Sampler*: a showcase and mini trade show for teachers, principals and other school representatives who book arts and cultural events into the schools. This program benefits local producers as well by providing a local marketplace for sales. Programs and artists presented at the Arts Sampler are on the Regional BOCES Artist Touring Program, and are thus eligible for BOCES State aid.
- *CRC Youthatre Series*: traditional presenting of performing arts events in a professional theatre setting to which students are bussed. A

teacher's kit is provided prior to the event, which includes a Youtheatre Playbill for each student, activity suggestions, and additional information on the performance.

- *\$5 Arts Pass* (new program for FY 91): program which provides high school students with a pass to purchase tickets at a discounted price of \$5 for events of their choice; pass provides a program of scheduled events from a range of local organizations, including dance, theatre, music. Funding from local foundations paid for printing of the passes, which were distributed to students through the schools; funding from the same foundations is also available to reimburse participating producers/presenters for lost ticket revenue. The response to the pass has far exceeded what had been anticipated — usage to date has totalled over 1,000, rather than the anticipated 250. Participating agencies have agreed to pro-rated reimbursement for lost ticket revenue (as funds are not sufficient for full reimbursement) since they are excited and pleased with the audience development aspect of the program.
- *High School Theatre Festival*: 3-day central New York regional high school drama competition, with adjudication, scholarship awards, and related workshops.
- *Student Jazz Festival and Competition*: day-long regional middle school/junior high/high school and college jazz ensemble competition, with adjudication, scholarship awards, and concert.
- *CRC Youtheatre Institute*: series of Saturday creative dramatics classes for ages 7 through 18.

#### Budget for FY 91/92

*CRC Institute for the Arts in Education*: \$88,300 (including administration)

*Arts Sampler*: \$3,400

*CRC Youtheatre Series*: \$117,000 (including administration)

*\$5 Arts Pass*: \$10,000

*High School Theatre Festival*: \$9,100

*Student Jazz Festival and Competition*: \$10,000

*CRC Youtheatre Institute*: \$4,100

#### Sources of funding

*CRC Institute for the Arts in Education*: New York State Council on the Arts (NYSCA) (\$2,500), New York State Education Department (\$68,700), registration fees (\$17,500)

*Arts Sampler*: NYSCA, corporate support, registration fees

*CRC Youtheatre Series*: NYSCA (\$10,500), ticket sales (\$105,500), class fees (\$5,400)

*\$5 Arts Pass*: Local foundations



*High School Theatre Festival: Private support, registration fees*

*Student Jazz Festival and Competition: Corporate support, registration fees*

*CRC Youthatre Institute: Class fees*

## Programs for Cultural Tourism

### *San Antonio Department of Arts and Cultural Affairs* *San Antonio, Texas*

#### Program description

The Department of Arts and Cultural Affairs (DACA) is a city department funded with through a municipal hotel/motel tax. In order to assuage the hotel/motel industry and to promote the arts as a tourist attraction for San Antonio, DACA has done the following:

- Under their existing Special Initiatives granting program, DACA established a Cultural Tourism Program to fund projects by arts organizations or artists that represent collaborations with the tourist industry (hotels, restaurants, transportation carriers, attractions, tour operators, travel agents, and other tourist-oriented merchants) to attract tourists to San Antonio arts events. The first year of the program, FY 1990, only one project was funded, which was a collaboration between a local presenter, a hotel, and a shop in a mall to attract Mexican tourists. The program is on hold for the current year, but will be re-established next year.
- DACA is planning a technical assistance program to encourage local organizations to collaborate with the tourist industry (which in turn will stimulate additional applications to the Cultural Tourism Program). This technical assistance program will take the form of forums and workshops with representatives of the tourist industry and other related professionals to help arts organizations and tourist industry professionals better understand and communicate with each other.
- DACA works very closely with the Convention and Visitors Bureau (CVB), which is also a city department. Since tourism is a leading industry in San Antonio, the CVB is very active, conducting many promotion/sales missions and attending various trade shows. A representative of DACA attends these shows with CVB staff, and has a table with brochures of local arts organizations as well as other arts marketing information. In addition, when CVB brings in travel writers, DACA staff meets with these writers to discuss arts activities in San Antonio.
- DACA publishes its own tour guides and brochures (in English and Spanish) about arts activities in San Antonio. It also publishes a bi-monthly newsletter which includes a calendar of events and which is sent to all hotels, tour operators, convention and visitor booths, libraries, etc.

- DACA is a member of the Hotel Sales and Marketing Association, whose members include hotel sales managers, tour operators, and other industry professionals. This membership is part of DACA's continuing efforts to nurture their relationship with the tourist industry.

Budget for most recent FY  
Cultural Tourism Program: \$25,000

Sources of funding  
Hotel/motel tax

*Broward Cultural Affairs Council*  
*Ft. Lauderdale, Florida*

**Program description**

The Broward Cultural Affairs Council (BCAC) is an agency of county government funded in part by tourist tax funds. BCAC efforts in recent years to develop a good working relationship with the tourist industry, specifically with the Greater Ft. Lauderdale Convention and Visitors Bureau and the Broward County Hotel/Motel Association, include the following:

- *Annual workshops on arts and tourism:* For each of the last two years, BCAC has sponsored workshops for cultural organizations and tourist industry representatives featuring nationally-known experts in the cultural tourism industry. These workshops are presented in partnership with the Convention and Visitors Bureau, the Hotel/Motel Association, and the Hotel Sales and Marketing Association. They have been attended by over 100 people, half from each of the targeted groups. The workshops have led to the development of several joint projects between these groups (historical river tours by a museum and a water taxi service, hotel package with bus tour operators including tickets to the Broward Center for the Performing Arts' production of "Phantom").
- *Arts and Tourism Partnerships:* Working with the Cultural Executive Committee (composed of executives of local cultural organizations) and the Hotel/Motel Association, BCAC has matched 30 organizations with 30 hotel managers, with the idea that these "partners" meet and discuss possible joint programming/marketing efforts. The results of these meetings are being written up for review and followup by BCAC staff. Several projects have resulted from these meetings, such as a dinner theatre program developed by a local theatre group and their "partner" hotel.

- *"Break for the Arts"*: Volunteers from the Chamber of Commerce Cultural Task Force conduct a travelling orientation program for hotel staff, using slide shows and other materials provided by BCAC. BCAC staff also conduct several of the orientation sessions. Cultural and hotel prizes are offered in response to correct answers after the program. This program acquaints hotel staff with available cultural resources.
- BCAC provides calendar information to the Convention and Visitors Bureau (CVB) for inclusion in a brochure produced by CVB for semi-annual distribution in all hotels.
- BCAC and CVB staff hold informal monthly luncheon meetings to exchange information.
- BCAC developed telephone stickers listing their cultural "hotline" number to be placed on hotel telephones. This "hotline" provides immediate information on current cultural events in Ft. Lauderdale.
- BCAC meets with travel writers referred by CVB to provide information on local cultural resources.
- Posters from local cultural organizations are provided by BCAC to hotel staff for posting in hotel lobbies.
- BCAC has organized several "FAM Tours" for hotel staff, which are bus tours to familiarize staff (front desk, concierge, valet parking, and marketing) with local cultural resources. Staff participating in the tours also receive free passes to the facilities for future visits, with the idea that familiarity with what is available will increase the likelihood of staff recommending these venues to tourists.

**Budget for most recent FY**

Minimal - most are volunteer activities.

**Sources of funding**

Workshops are funded by participant fees.

# Appendix D

## Telephone Survey Protocols

On the following pages the consultants provide a copy of the telephone survey protocol developed in consultation with the client and used in the survey described in detail in Part II of this report. Please refer to that section for answers to questions relating to the findings as well as the methodology employed.

PORTLAND TRI-COUNTY ARTS SURVEY QUESTIONNAIRE

(ASK TO SPEAK TO HEAD OF HOUSEHOLD.) Time Started:

Hello, I'm calling on behalf of the Metropolitan Arts Commission to investigate interest in the arts in the region. We would like to ask you a few questions about the cultural activities in Portland and the Tri-County Metropolitan area.

1. For this survey we are only talking to people in certain age categories. What is your age please?

- 1. Under 18         -- TERMINATE
- 2. 18-24
- 3. 25-34
- 4. 35-44
- 5. 45-54
- 6. 55-64
- 7. 65 AND OVER

2. In what County do you live?

- 1. Multnomah      -- GO TO Q2a
- 2. Washington    -- GO TO Q 3
- 3. Clackamas      -- GO TO Q 3
- 4. ALL OTHERS    -- TERMINATE

2a. Do you live within the City of Portland?

- 1. No
- 2. Yes

3. During the past 12 months, have you attended any type of performing arts or entertainment event in Portland or the Tri-County Metropolitan area, such as the symphony or other classical music concert, a play, a Broadway show, a dance concert, an opera performance, or a popular concert for which you or someone else paid for the tickets?

- 1. No    -- (GO TO Q.3a)
- 2. Yes    -- (GO TO Q.3b)

3a. Have you visited a museum, a science center or an art gallery in Portland or the Tri-County Metropolitan area in the past 12 months?

- 1. No    -- ( go to Q. 11)
- 2. Yes    -- ( go to Q. 4)

3b. Have you visited a museum, a science center or an art gallery in Portland or the Tri-County Metropolitan area in the past 12 months?

- 1. No
- 2. Yes

4. I am now going to read a list of cultural events and institutions. For each type of event, please tell me if, within the last 12 months, you have attended such an event *in the Tri-County Metropolitan Area*, and if you have, about how many times you attended in the past year.

	If attended,		
	Attended	# of Times	
1. A concert by the Oregon Symphony	No	Yes	_____
2. A concert presented by Chamber Music Northwest	No	Yes	_____
3. A performance by the Portland Opera	No	Yes	_____
4. A visit to the Oregon Museum of Science and Industry	No	Yes	_____
5. A current touring Broadway musical, such as "A Chorus Line" or "Cats"	No	Yes	_____
6. A visit to the Portland Art Museum	No	Yes	_____
7. An event at the Interstate Firehouse Cultural Center	No	Yes	_____
8. A performance by the Oregon Ballet Theatre	No	Yes	_____
9. A play by the Oregon Shakespeare Festival - Portland	No	Yes	_____
10. A play by a professional theatre company other than the Oregon Shakespeare Festival	No	Yes	_____
11. A free outdoor event such as Waterfront Classics or concerts in neighborhood parks	No	Yes	_____
12. A play presented by the Lakewood Theatre Company or another community theatre group	No	Yes	_____
13. A youth theatre performance	No	Yes	_____
14. An experimental or avant garde play	No	Yes	_____
15. A modern dance concert, such as Twyla Tharp	No	Yes	_____
16. An arts festival like ArtQuake	No	Yes	_____
17. A One-man Show, such as Hal Holbrook as Mark Twain	No	Yes	_____
18. A comedy act, such as George Carlin	No	Yes	_____
19. A performance by a Popular Artist such as Frank Sinatra or George Benson	No	Yes	_____

- 20. A jazz concert No Yes \_\_\_\_\_
- 21. A rock concert No Yes \_\_\_\_\_
- 22. A Country and Western Concert No Yes \_\_\_\_\_
- 23. A concert of ethnic music or dance, such as the African-American Ballet Company or East Indian music or dance No Yes \_\_\_\_\_
- 24. A class at a Park and Recreation department program such as the Theatre Workshop or the Community Music Center No Yes \_\_\_\_\_
- 25. Other \_\_\_\_\_ No Yes \_\_\_\_\_

5. What is your primary source of information about arts events? (DONT READ)

- 1.  The Oregonian
- 2.  The Downtowner
- 3.  Willamette Week (*pronounced will AM et*)
- 4.  National Public Radio (KOPB)
- 5.  National Public Television (Channel 10)
- 6.  Portland Center for the Performing Arts Calendar
- 7.  Direct mail from Arts Groups
- 8.  Word of mouth
- 9.  Other \_\_\_\_\_

6. When you attend arts events, how many people are usually in your party, including yourself?

1. Number in party \_\_\_\_\_

7. When you attend an arts event, are there ever children under age 18 in your party?

- 1. No -- ( go to Q. 8)
- 2. Yes -- ( go to Q. 7a)

7a. What percentage of the time would you say that children accompany you to arts events?

- |           |            |
|-----------|------------|
| 10% _____ | 60% _____  |
| 20% _____ | 70% _____  |
| 30% _____ | 80% _____  |
| 40% _____ | 90% _____  |
| 50% _____ | 100% _____ |

7b. When children attend with you, how many attend? \_\_\_\_\_



8. Are you a season ticket holder, or a subscriber, to any *performing arts* group in the Tri-County Metropolitan area?

- No    ()-- ( go to Q.9)  
Yes   ()-- ( go to Q.8a)

8a. Which ones? (DON'T READ)

1. () Oregon Symphony
2. () Oregon Shakespeare Festival - Portland
3. () Portland Opera
4. () Oregon Ballet Theatre
5. () Portland Arts and Lectures Series
6. () Other \_\_\_\_\_

9. Do you hold a membership in any local museum, science center or art gallery?

1. No ()-- ( go to Q. 10)
2. Yes ()-- ( go to Q. 9a)

9a. Which ones? (DON'T READ)

1. () Portland Art Museum
2. () Children's Museum
3. () Oregon Museum of Science and Industry
4. () Oregon Historical Society
5. () Other \_\_\_\_\_

10. Within the past three years, have you made a monetary contribution to a cultural group in the Tri-County Metropolitan area?

1. No ()-- ( go to Q. 11)
2. Yes ()-- ( go to Q. 10a)

10a. Which ones have you contributed to?(DON'T READ)

1. () Oregon Symphony
2. () Oregon Shakespeare Festival - Portland
3. () Portland Opera
4. () Oregon Ballet Theatre
5. () Portland Arts and Lectures Series
6. () Portland Art Museum
7. () Children's Museum
8. () Oregon Museum of Science and Industry
9. () Oregon Historical Society
- 10.() Other \_\_\_\_\_

11. I am going to read some reasons people give for not attending more events in *the Tri-County Metropolitan area*. For each reason that I read, please tell me whether it is a major reason, a minor reason, or not a factor at all for you, yourself, not attending more events in the area.

	Major	Minor	Not a Factor
1. "The performing arts groups don't offer what I want to see."	1	2	3
2. "The facilities in Portland are difficult to find."	1	2	3
3. "The quality of the presentations is not high enough."	1	2	3
4. "I don't hear about the events in Portland."	1	2	3
5. "Parking downtown is difficult and expensive."	1	2	3
6. "The starting times for arts events are not convenient for me."	1	2	3
7. "It takes a long time to get into Portland for events."	1	2	3
8. "The ticket prices are too high for me to attend more events."	1	2	3
9. "I don't have anyone to attend events with."	1	2	3
10. "I don't feel safe in Portland."	1	2	3
11. "I don't understand arts events."	1	2	3
12. "I only go to see well known performers."	1	2	3
13. "I don't feel comfortable with the people who attend arts events."	1	2	3
14. "Other activities use up all of my free time."	1	2	3
15. "I'm not interested in arts events."	1	2	3

12. We have heard some general comments about the arts in the metropolitan area, and I am going to read them to you. For each of these comments, please tell me if you strongly agree, agree, disagree, or strongly disagree with the statement.

	Strongly Agree	Agree	Don't Know	Disagree	Strongly Disagree
1. "The arts are available to all residents, no matter where in the Tri-County area they live."	1	2	3	4	5
2. "More cultural activities should take place in neighborhoods rather than in downtown Portland."	1	2	3	4	5
3. "The quality of the arts in Portland is higher than it was five years ago."	1	2	3	4	5
4. "The arts in Portland are only of interest to the wealthy and well-educated"	1	2	3	4	5
5. "There are plenty of facilities for small performances and classes throughout the Tri-County area."	1	2	3	4	5
6. "There is little diversity of cultural expression in arts programs in Portland."	1	2	3	4	5
7. "Portland is a much better place to live because of the variety of arts activities going on here."	1	2	3	4	5
8. "City and County government should continue to support cultural activities in our community."	1	2	3	4	5
9. "There should be more opportunities for interested people to participate in the arts through classes and performance opportunities."	1	2	3	4	5

13. If more high quality arts programs for children were available in *the region*, do you think your annual attendance at children's events would increase, remain about the same, or decrease?

1. ( ) Increase -- GO TO 13a
2. ( ) Remain about the same -- GO TO 14
3. ( ) Decrease -- Go TO 13b

13a. By how much do you think your attendance would increase?

1. ( ) once a year
2. ( ) twice a year
3. ( ) 3-5 times a year
4. ( ) 6-8 times a year
5. ( ) 9 or more times a year

GO TO Q. 14

13b. By how much do you think your attendance would decrease?

- 1. ( ) once a year
- 2. ( ) twice a year
- 3. ( ) 3-5 times a year
- 4. ( ) 6-8 times a year
- 5. ( ) 9 or more times a year

14. Now I am going to read a list of events. For each one, please tell me whether you would be extremely interested, very interested, a little interested, or not at all interested in attending, if a top quality offering were available *in the metropolitan area.* (RECORD BELOW)

	Extremely Interested	Very Interested	A Little Interested	Not At All Interested
1. A concert by the Oregon Symphony	1	2	3	4
2. A concert by a major visiting symphony	1	2	3	4
3. A chamber music concert or a recital	1	2	3	4
4. An performance by the Portland Opera	1	2	3	4
5. A performance by a visiting opera company	1	2	3	4
6. A current Broadway musical, such as "A Chorus Line" or "Cats"	1	2	3	4
7. A play by the Oregon Shakespeare Festival or another professional theatre company	1	2	3	4
8. A current Broadway drama such as "Steel Magnolias" or "Driving Miss Daisy"	1	2	3	4
9. A play presented by a local community theatre group	1	2	3	4
10. A children's theatre performance	1	2	3	4
11. An experimental or avant garde play	1	2	3	4
13. A performance by the Oregon Ballet Theatre	1	2	3	4
14. A performance by a visiting ballet company	1	2	3	4
15. A performance by a modern dance company	1	2	3	4
16 A One-man Show, such as Hal Holbrook as Mark Twain	1	2	3	4
17. A comedy act, such as George Carlin	1	2	3	4

18. A musical performance by a Popular Artist such as Frank Sinatra or George Benson	1	2	3	4
20. A jazz concert	1	2	3	4
21. A rock concert	1	2	3	4
22. A Country and Western Concert	1	2	3	4
23. A concert of ethnic music or dance, such as the African-American Ballet Company or East Indian music or dance	1	2	3	4
24. An Arts Festival like ArtQuake	1	2	3	4

15. There are many ways in which education in art, music, drama, and dance may be improved for school children in the region. For each of the programs I will read to you, please tell me if you think it is Very Important, Somewhat Important, or Not Important to include them in the school curriculum.

	Very Important	Somewhat Important	Not Important
1. Providing more classroom education in art, music, drama and dance.	1	2	3
2. Providing field trips to museums and arts events.	1	2	3
3. Providing tickets to live arts events at reduced cost to school children and their families.	1	2	3
4. Providing more extracurricular, participatory activities in art, music drama and dance.	1	2	3
5. Providing artists to work with children for special in-school experiences.	1	2	3

16. Portland and some of the counties in the area have programs through which one percent of the budget for public construction projects is spent to purchase art works like Portlandia or the sculptures on the transit mall for placement in public spaces. Are you aware of these programs?

- 1. No ( ) -- GO TO Q 17
- 2. Yes ( ) -- GO TO Q 16a

16a. Do you think these programs should be expanded, remain about the same, or be reduced in scope?

- 1. ( ) Expanded
- 2. ( ) Remain about the same
- 3. ( ) Reduced in scope

17. In the past 12 months, have you attended a professional or semi-professional sports event in the Tri-County Metropolitan area?

- 1. No ( )
- 2. Yes ( )

### CLASSIFICATION

Now, I have a few more questions for statistical purposes only. The answers will, of course, be kept in strictest confidence.

18. How long have you lived in the Tri-County Metropolitan area?

- 1. ( ) one year or less
- 2. ( ) 2 years
- 3. ( ) 3 years
- 4. ( ) 4-6 years
- 5. ( ) 7-10 years
- 6. ( ) More than 10 years

19. Was the highest level of education you completed...

- 1. ( ) Grade school
- 2. ( ) Some high school
- 3. ( ) High school graduate
- 4. ( ) Some college
- 5. ( ) College graduate
- 6. ( ) Post graduate work
- 7. ( ) Technical school

20. Which of the following best describes your current living situation? (READ LIST)

- 1. ( ) I am married and living with my spouse
- 2. ( ) I am living with my parents or other adult family members
- 3. ( ) I am living alone
- 4. ( ) I am living with other adults, not family members
- 5. ( ) I am the only adult in my household

21. How many children under age 18 live in your household? \_\_\_\_\_

22. Is the chief wage-earner self-employed, or employed by a company or the government?

- 1. ( ) Self-employed
- 2. ( ) Has employer
- 3. ( ) Retired
- 4. ( ) Other

23. What is the occupation of the chief wage-earner? (Probe for specific details of duties for classification.) \_\_\_\_\_

24. Is there another wage-earner in the house?

- 1. No ( )-- GO TO Q. 24
- 2. Yes ( )-- GO TO Q. 23b

24b. How many wage-earners are there in all? \_\_\_\_\_

25. If you don't mind telling me, was your total household income before taxes in 1990...

- 1. ( ) Under \$10,000
- 2. ( ) \$10,000-14,999
- 3. ( ) \$15,000-24,999
- 4. ( ) \$25,000-34,999
- 5. ( ) \$35,000-49,999
- 6. ( ) \$50,000-74,999
- 7. ( ) \$75,000-99,999
- 8. ( ) \$100,000 or more

26. Is your ethnic origin...

- 1. ( ) White
- 2. ( ) African-American
- 3. ( ) Hispanic
- 4. ( ) Native American
- 5. ( ) Asian-American
- 6. ( ) Other (specify) \_\_\_\_\_
- 7. ( ) No answer

27. Record Sex of Respondent

- 1. ( ) Male
- 2. ( ) Female

28. Record Zip Code \_\_\_\_\_

## Appendix E: Local Government Support for Art Museums

A survey of West Coast art museums was conducted recently by the staff members of the Oregon Art Institute. The survey provided the following information about local government support for facility maintenance and security costs. It is important to note that these figures reflect accounting systems and methods of funding that vary widely. They are intended to give a general idea of the extent of local government support in the areas mentioned. The consultants would like to thank Erin Boomer at the Oregon Art Institute for this material.

### Anchorage Museum of History and Art

Local government support provided by Municipality of Anchorage

Facility maintenance:	\$607,580
Security:	\$376,020

The municipality also provides funding for capital expenses

### The Fine Arts Museums of San Francisco

Local government support provided by City and County of San Francisco

Facility maintenance and security:	\$4,363,950
------------------------------------	-------------



Seattle Arts Museum

Local government support provided by City of Seattle

Facility maintenance:	\$176,000
Security:	\$211,000

San Diego Museum of Art

Local government support provided by City of San Diego through Park Bureau

The Park Bureau was unable to break down support figures because numerous City agencies (General Services, Fire Bureau, Police Bureau, Park Bureau, etc.) provide services or pay expenses directly. An estimate of \$600,000 was given.

Crocker Art Museum

Local government support provided by City of Sacramento, California

Facility maintenance:	\$8,000
Security:	\$180,000