Building Arts Participation in Rural America

Success Stories



Learning from Montana's Arts Organizations

montana arts council

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How to Build Arts Participation in Rural America Learning from Montana's Arts Organizations

By Louise K. Stevens



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PARTICIPATION STRATEGY: BROADEN, DEEPEN, DIVERSIFY

Seven Communities, Seven Models for Building Rural Participation

Broaden			
Alberta Bair Theater	Billings	Build an audience and presence in the neighboring rural town of Laurel BAP Investment \$56,250 Total Project \$168,500	
Montana Shakespeare in the Parks	Bozeman	Build local commitment, ownership, and audience in rural towns where it annually tours. BAP Investment \$34,000 Total Project \$198,800	
Pondera Players	Conrad	Install seating, invite audience response, build a database, and ask for volunteers to perform and work backstage. BAP Investment \$29,970 Total Project \$91,300	
Deepen			
Glacier Symphony and Chorale	Kalispell	Create "second home" satellites in rural communities throughout the Flathead region. BAP Investment \$37,500 Total Project \$390,200	
Performing Arts League	Choteau	Extend every visiting artist stay to include community pre-performance residencies and events and challenge localities to experience artists and art forms that are new to the community. BAP Investment \$34,875 Total Project \$275,060	
Diversify			
Custer County Art and Heritage Center	Miles City	Build a local and tourist audience through broader range of exhibits and programs along with billboards and tourism marketing. BAP Investment \$37,148 Total Project \$174,425	
Hockaday Museum of Art	Kalispell	Showcase area collectors and their collections, winning new members, attendees and enthusiasm. BAP Investment \$20,257 Total Project \$156,290	



Communities	Population	
Billings	95,220	
Choteau	1,738	
Laurel	6,342	
Libby	2,648	
Bigfork	1,421	
Miles City	8,162	
Kalispell	18,480	
Conrad	2,600	
Bozeman	33,535	

The Place

Rural America is defined by land. From wide, open fields to narrow valleys, people in rural communities are deeply linked to place. They are self-sufficient, and capable of producing a great deal with very little. In attitude and perspective, they have changed remarkably little from those who lived in these communities a hundred years ago.

Of all America, Montana may best define rural. Its big cities are what others would call small towns. There are many places where the population is less than one person per square mile. Statistically, there are on average seven people per square mile statewide. There are many one-room schools. A drive for groceries can be a daylong excursion. They don't call it Big Sky Country for nothing.



Butte Performance, Montana Shakespeare in the Parks.

Going to an arts event in a Montana town may take an hour or more each way on rural roads—bumpy, narrow gravel roads. Potentially, these are snowbound roads from November to April. A trip home after a December concert, for a rural resident, can involve a snowmobile ride in the dark if a resident lives 20 or so miles outside a hub like Bozeman or Missoula, down a windy gravel road. To get out of a more isolated place like Cooke City in the winter—say for a weekend trip to go see a play at the Alberta Bair Theater in Billings—residents have been known to snowmobile across a high mountain basin for a good hour to reach an open road, and then drive two more hours across high mountain roads. It is the simple reality of this place. A long summer drive across miles and miles of empty ranch land, or a winter trek through white-out conditions: both tell of the every day challenges Montanans accept as normal.

Here the arts groups reflect the land, the isolation, the challenges of distance and transportation. The art itself can be as sophisticated and cutting edge as any. The quality can be superb, rivaling anything, anywhere. Many artists have chosen to move here from urban hubs, bringing their expertise and considerable talent. They rub shoulders with homegrown artists who have legacies of their own.

But the nature of the arts organizations themselves, and their ability to build participation, is significantly different from organizations in populated areas. They are kind to newcomers, but they don't take kindly to newcomers telling them what to do. They want a larger audience, a larger donor base, and the hallmarks of success. But countering that, and much more important to them: they are fiscally prudent and conservative. They want their organizations to be solid, which typically means rolling up their sleeves and doing more with less. They are wary of risks.

Their boards will bake pies to serve up during intermission. They'll exhibit old cars to get the ranchers and construction guys into the museum. They'll buy a bus so their visiting artists don't have to brave the white-out winter storms driving on their own to get to a school residency. They'll buy bleacher seats so their audience can see the play better than they could with folding chairs. They are practical and about as down to earth as it comes.

These organizations don't always do things like strategic plans—at least, not easily or willingly. They aren't prone to big dreams. They don't like writing grant applications if a potluck can raise just as much money. They stop working at the limits of their volunteers' time. Long range means six months from now, not six years. They are used to working with no public money to speak of—certainly not much from their local government. In an almost perverse way, they are proud of the tradition of not over-relying on government

support, or of needing the kind of foundation or corporate support that their counterparts in populated areas rely upon. (There is only one Fortune 500 Corporation in the state.) There is a self-reliant backbone in each of these organizations. It is the framework of their thinking.

Because they reflect the determination and dedication of their volunteers, they typically have always offered much more of what is the new nonprofit "in" phrase-public value. Their public value is evident in the one dollar and one hundred dollar bills they see in the old fashioned "pass the hat" at the end of the play. It is seen in the in-kind lumber donations for theater sets, or when the volunteers in the towns they visit set up dinner for the musicians. You can see it in the willingness of the Chambers of Commerce and Downtown Associations to hang banners over Main Street announcing symphony concerts. Or, in the willingness of a farmer to stop by the restaurant table and buy dinner for the visiting actors, even if they are a decidedly different group than the normal Carhartt crowd that frequents the local saloon-steakhouse.

With this as their world, they also face the same reality of any arts groups, anywhere in the country, plus the challenges of small towns in many places: out-migration is greater than in-migration, as in many places around the state young people leave home and don't return.

Satellite dishes bring hundreds of channels to rural homes. Satellite internet brings instant information. iPods are ubiquitous. As a result, people make those drives into town for the arts less and less. They don't need it as much. Factor in the cost of gas for lengthy Montana-size trips, and the barriers are significant. Populations have shrunk. In many rural communities that are experiencing a decline in population, and are dominated by older residents, donors have died off. There are fewer volunteers to do the work.

But then, there are the newcomers, the thousands of people who have flocked here over the past decade from places such as Washington, California, Oregon and Minnesota. These newcomers have created a huge opportunity for some rural arts groups, especially those in the western part of the state where mountains, lakes and rivers offer relocation benefits. They want to get involved in their new communities. They want quality arts-and they know quality when they see it. They want arts for their children. They often don't quite know how to break into or break down the walls around those self-reliant groups. But they keep trying, coming up with new ideas, wanting to get involved, and pressing the old and comfortable status quo.

In this way, in communities that experience both in-migration and outmigration, Montana's rural arts groups mirror and model the dynamic that faces many similar organizations in states throughout the country and around the world. Those that are experience in-migration are losing one audience—



Exhibit, Custer County Art & Heritage Center.

their long time, now aging group of loyal supporters and seeking another group that is younger, perhaps new to town, and unknown to them.

They are proud of their ability to work on a shoe-string, but need more resources in order to produce the quality and have the visibility they need to win that new participation. They love the fact that their budgets are a fraction of what you'd see in a group doing similar work in a state like Wisconsin or Ohio. But they need bigger budgets to survive.

They are accustomed to being volunteer driven, inward oriented, but they need to think about their audience interests and respond in order to build a new public value. It

challenges their way of operating. To stay relevant, they need to do more, reach more people, and develop a new image. They need to advertise and do the outreach. They need more earned and contributed income. They have to earn more to do more.

This is the context for Montana's Building Arts Participation (BAP) program, an initiative of the Montana Arts Council funded by The Wallace Foundation. As one of the thirteen states funded for the State Arts Partnership for Cultural Participation (START) Program, Montana received \$500,000, a tremendous sum for a rural state. Of this, the Montana Arts Council re-granted \$300,000 to the field in multi-year funding. This went, first, to twelve organizations in the form of modest planning grants (\$5,000 each). Out of those twelve, seven organizations were selected by a panel to receive anywhere from \$20,000 to \$56,000 over a three-year period.

For organizations of this size (their combined budgets were \$2.6 million when they entered the program), in a state with only a handful of foundation and corporate donors, these grants were significant. The grant size was intentional;

to provide enough funding to leverage the grantees through the changes needed to build participation and new revenue.

There were several pieces to the program. Chief components were designed by Cinda Holt, the business development specialist for the Montana Arts Council and program director of the BAP program, and consultant Louise Stevens, President of Montana-based ArtsMarket, Inc., who provided project planning guidance, research, and evaluation for the BAP program. Stevens's prior experiences as a consultant and evaluator for the former NEA Advancement Program, and her experience in counseling arts organizations of all sizes in building participation, shaped the research-based and benchmarking approaches she recommended to the program.

Cinda Holt's experiences helped inspire her to institute the planning grants. "Having spent over 20 years as an arts administrator, in various size institutions, I always found it difficult to take seriously and carve out the time necessary to plan," said Cinda. "To have a grant opportunity that has funding attached provides a vehicle to formalize a team. It was especially rewarding to hear, after the fact, from organizations that didn't receive planning grants that this started the planning discussion anyway." Coaching from professional organizational development consultants was integrated into the program, which was something very new to most of the organizations. The Montana Arts Council also established a Leadership Institute, offering these organizations and their boards a tuition-free way to work through topics such as governance and fund raising. Periodic teleconferences or in-person get-togethers were held for the groups to share success stories and challenges.

The program was preceded by a statewide telephone survey undertaken by ArtsMarket on behalf of the Montana Arts Council, The Montana Study¹, that provided a baseline of public opinion and participation statistics, broken out by region and community, so that all the participants could learn about their markets. Along with this, there was a baseline financial study and economic impact study that documented audiences, participation, donors, outreach, and revenues. The project was designed to require annual benchmarking against this baseline, and set up an evaluation dialogue to help each organization through reflective learning.

The seven selected organizations mirrored the geography of the state, from the rangelands of Miles City in the east, to the mountains of Kalispell in the northwest. The organizations entered the program by choosing to work on a particular strategy to build participation: broadening audiences, deepening participation, and diversifying involvement. These three themes responded to the Wallace Foundation's investment in participation research with the

¹ The Montana Study, ArtsMarket, Inc. 2001.

RAND Corporation, which identified the three as the essential pathways to building public participation in the arts. By the end of three years, most had blurred the lines between the pathways, broadening, deepening, and diversifying their audiences.

Each found success. They built participation, sometimes in spectacular numbers. Like those gravel Montana roads, there were plenty of bumps along the way. In small communities, changes to a board composition or the exact count of how many people showed up for a dance performance are very visible. Newcomers came and joined as members, and old timers sometimes left. But these Montana organizations weathered the changes and came out stronger, a little unsure of their new selves, a little wary of success—as always. Rural groups don't get cocky. They just work harder.

These are great case studies of what it takes to build participation in rural America. The Montana Arts Council itself is a case study in how it shaped the program, responded to the rural organizations involved, and evolved in its own grant making and relationships to the field. Without its recognition of the realities of the arts in a rural landscape, and its willingness to let the grantees learn, experiment, and share the ups and downs along the way, the arts would not be as valued as they currently are within this state.

As evidence of the depth of public value the arts now have in the state, consider the editorial that the Bozeman Daily Chronicle wrote about Montana Shakespeare in the Parks, one of the Building Arts Participation grantees, a few months after the three year BAP program ended. On Sunday, July 16, 2006, the full editorial column was headed "Do Your Part to Keep Shakespeare on the Road." The column noted that "some might regard this egalitarian dose of summer theater for far flung Montanans as a luxury, but it's a luxury that this state can ill afford to lose from an educational and qualify of life standpoint."

Would there have been the same commitment to Shakespeare in the Parks before it began the zealous outreach and relationship building it undertook through the Building Arts Participation program? Not likely. Now, its hometown newspaper editorial asks readers to "Be there when Shakespeare in the Parks comes around for a performance. When the show is over, pony up a ten-spot. You'll be doing yourself and all your fellow Montanans a good turn." Luxury? Irrelevant? Hardly.

Learn by Doing

"In Montana, we learn by doing. We don't learn from academic models from the outside. We dig in and do," said Arni Fishbaugh, director of the Montana Arts Council. She was speaking to two points: one, why the council prefaced its Building Arts Participation granting program with a major statewide telephone survey; and second, why it then rapidly moved forward with a granting program that invited experimentation from the field.

Montana isn't a place where people ponder and theorize. They act. When the Montana Arts Council won Wallace Foundation funds, it wanted to put those funds out into the field as quickly as possible. "We launched the process using information from The Montana Study and the ideas behind the RAND study's focus on broadened, deepened and diversified participation," said Fishbaugh.



Workshop, Custer County Art & Heritage Center.

"We let our arts organizations take it from there. We didn't go through long and lengthy academic explanations of how organization could build participation. We wanted them to learn by doing, and we wanted to learn side by side with them. We wanted to have a serious impact on the arts industry. So we came up with the approach of practicality, of on-the-ground work."

The program was called Building Arts Participation. Like all building, the intent of this program was to begin with basic ideas, turn them into to blueprints, and then action. As a practical, learn-by-doing program, it allowed ample room for—and actually encouraged—experimentation. Normally, when organizations are strapped for resources and fiscally conservative by nature, they don't experiment. With grants this size, over a multi-year period, the arts council was encouraging the kind of risk taking that otherwise wouldn't happen.

There were experiments that failed. There were ideas that blossomed into something bigger and better once they were tried and refined. There was the



Workshop, Performing Arts League.

recognition that the job was never done, and that no one could rest on their laurels and stop working on building new participation. For three years, Montana arts organizations built participation, learned what worked, and changed the way they did business.

By encouraging organizations to experiment, and to do so transparently—with the win and lose stories shared along the way—the arts council became a partner, not just a grant maker. By providing tools for the experimentation such as the 1000 household "The Montana Study" as well as the program's Leadership

Institutes and the periodic group gatherings, it took responsibility for forwarding new thinking. By requiring annual evaluation and benchmarking of progress in publications such as The Montana Story², it set up a level of candor with its grantees: everyone was in this together.

"The process changed us, too," said Fishbaugh. "It shaped our strategic planning process. It led us to ask what role a state arts council should have in helping arts organizations prove relevance."

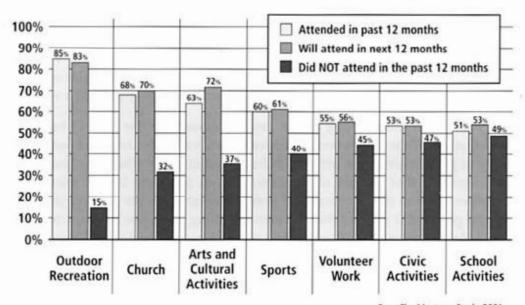
Is that the job of a funder? It didn't used to be. But the Montana Study showed clearly that the arts matter to the majority of citizens in this state, not just a few. So moving arts organizations to respond to that public interest became a job of both the funder and the grantees. The Montana Study showed that the public here wants the arts, wants quality, and wants art that is relevant.

The study showed that the arts here aren't at all the province of a few, but are an interest of the majority. It found that Montanans are more likely to participate in the arts than in sports, civic activities or school activities. "I think the Montana Study was immensely important to start this process, because it was written for our area and was relevant for our people. It spoke to them, and it illuminated for our arts organizations what would motivate participation," said Fishbaugh. While national data is helpful, people always put more value into studies that speak to their communities, to their realities.

² Building Arts Participation in Rural America, The Montana Story. By Louise K. Stevens. Published by The Montana Arts Council, 2004.

"We heard time and again how interested people were in the survey findings," Fishbaugh continued. "It helped them reshape the way they market their work. They paid attention to the finding that one of the top reasons to attend is shared experience with family and friends. They were interested in the figure that compared arts participation to sports participation and found that arts participation came out ahead. That gave folks in the field a feeling of great validity and importance in their work."

Among many statistics, the study showed that the arts and culture were second only to outdoor recreation as something people planned to do in the next year. "It showed the way residents care about the arts in comparison to outdoor recreation and church, which was an important finding in this state," said Fishbaugh. People move to Montana for outdoor recreation. And in small towns, churches are very important. To see interest in arts participation up there with sports, church, and outdoor recreation was important. That finding, alone, hit home with arts groups and gave them courage to take the risks involved in reaching out to build audiences. And it resonated with legislators who began to see that the arts were meaningful to the majority of Montanans.



From The Montana Study, 2001

Recognizing how the public perceived the arts in a broader context shaped many elements of the Building Arts Participation program. The study was required reading for all applicants, and most of the applicants used its statistics as foundations for the strategies they chose. The statistics on broad public interest in the arts also opened up the council's dialogue with state legislators, and encouraged the council to place legislators on the BAP grant evaluation panel.

"We had put legislators on panels before," said Fishbaugh. With the study in hand, the council was even more convinced that dialogue about building participation needed to involve elected officials. They wanted legislators to evaluate best strategies to use these funds to leverage change, to have groups take important risks. "So this time, we asked them specifically, 'what would it take to



Exhibit, Hockaday Museum of Art.

convince you that something is a success and worthy of state investment?' They said 'return on investment.' They wanted to know that in building participation, Montana's arts organizations were building public value. They wanted to see that arts organizations increased their public relevance, and to do that requires building relationships."

This thinking opened the door for new operating philosophy for the Montana Arts Council. If the public values the arts, as the study proved, then building arts organizations' capacity to make the arts much more accessible—and get more people more deeply involved—would become a top priority. This, in turn, would make arts organizations throughout the state more relevant and meaningful not only to their specific audiences, but to the public as a whole.

The study also showed one of the key disconnects in the task of building participation: While the majority of Montanans value the arts and are more likely to participate in the arts and culture than in many other civic pursuits, they reported that the art often showcased in the state lacked relevance. "Another element of the report that was important was the finding that the general public did not feel that the artwork being done was relevant to their lives. And so that created a catalyst for groups to develop creative ways

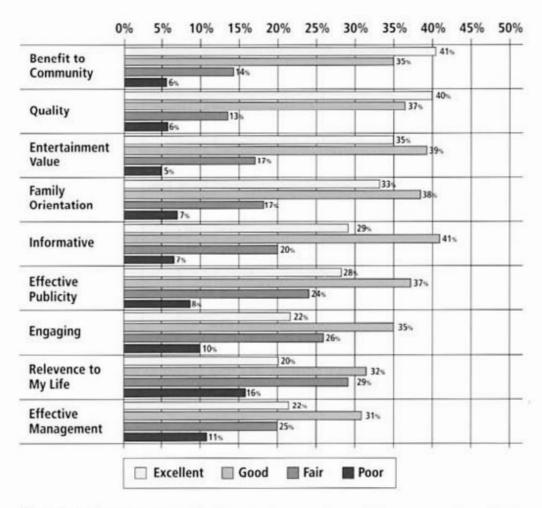


Reception, Glacier Symphony and Chorale.

to make connections to their public," said Fishbaugh.

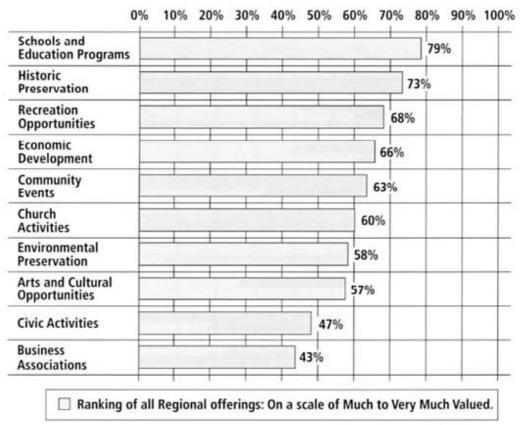
The relevance finding was seminal. Respondents ranked the relevance low. More Montanans ranked the "relevance" of the arts that they participated in as only "fair" and "poor" than any other characteristic related to the arts in the survey. It was a shocker.

Perceptions of the Arts in Montana, from The Montana Study, 2001



Return on investment and relevance became two of the program's calls to action. The third call to action, the concepts of relationship, responded to another disconnect the study identified. While Montanans said they were more likely to participate in the arts than in civic, school, or sports activities, they didn't feel that the arts mattered to their communities—from the smallest community to the largest cities—anywhere near as much as other causes. The arts weren't a cause evoking the same level of passion as schools, economic development, or even historic restoration.

To change this, and to increase the value people feel the arts bring to their lives, the Building Arts Participation program focused on building relationships with the public, as well as on building relevance. Getting people involved, passionate and active would prove to be an important element of the success of this program.



Source: The Montana Study, 2001

The concept of "building participation" rather than "building audiences" was important to the program. It has its roots in the RAND report, "A New Framework for Building Participation in the Arts³," that demonstrated participation as being built in diverse ways. It showed that deepening the affiliation that people feel towards an organization (or towards the arts in general) is as important as geographically or demographically expanding or diversifying audiences and participation.

The "deepening" approach was the stated strategy of two of the BAP grantees going into their projects. By the end of the program, however, four out of the seven organizations found they had concentrated their efforts most successfully on deepening relationships with their community, their members, and participants. Every one of the grantees noted that while getting newcomers in the door once is great, for the long term, it is more important to get people truly involved, to make the organization a part of their lives. All of the organizations noted that success for the long term comes most often in the

³ A New Framework for Building Participation in the Arts. By Kevin McCarthy and Kimberly Jinnett. Published by RAND, 2001.

counts of new members, who then renew memberships, become contributors, and get involved as volunteers. These are the people who then tell their friends to come, who invite others and thereby build the circle of support.

These are the people who begin to make the arts organization a cause, who care as deeply about it as other community events, their churches, their civic economics, and their schools.

The Three Rs. Return on Investment, Relevance, and Relationship not only shaped the program, but also became the foundation for new thinking within the Montana Arts Council. "That return on investment idea," said Fishbaugh, "has changed our operating support grants from Organizational Excellence Grants to Public



Arlynn Fishbaugh

Value Partnerships, to investments that tie what we now call the Three Rs into the guidelines. In the past four years, we've all learned that building participation builds value. And in the end, that building it is all about the Three Rs—relevance, relationships, and return on investment," explained Fishbaugh.

In addition to conceptually changing the Montana Arts Council's programs, the BAP program also changed the way the council speaks to its constituents and what it requires of them. To do this, the BAP program responded to that fundamental rural "can do" mentality by promoting clear, basic ideas. Throughout, it used straightforward language. From the Montana Study on through the design of the entire program, the Montana Arts Council was committed to translating jargon into terms and words the field could understand, accept and use.

For example, based on the recommendations of that original panel concerning return on investment, the BAP program set up an annual self-evaluation process that was required of each group. "The straightforwardness of the annual evaluations—not theoretical or academic—were useful here, said Fishbaugh. "Our asking the question about return on investment and asking organizations to report on that issue, was very valuable."

"We wanted this to be a learning process. We allowed for success and failure and encouraged candor," said Fishbaugh. "People knew this was a learning process. We wanted enough time in the program for them to learn and reshape as they went along. And we wanted to help when they needed it."

"It was to be a customized course," said Cinda Holt. "We wanted people to take planning seriously, and give them the resources to enable them to get enthusiastic about it. Sizable seed monies made all the difference. All too often



Cinda Holt with Louise Stevens.

nonprofit organizations have to shape their planning around someone else's agenda, perhaps a funder, or an individual on the board. This was an opportunity for them to ask for funding for their own agenda, for something integral to their own growth."

Research provided the tools to build that enthusiasm and show organizations the many ways they could build participation. In addition to the Montana Study, BAP organizations used another tool provided

to them, a diagnostic self-study that helps organizations quiz themselves on marketing and participation capacity. Originally presented as a part of a workshop text developed for a 1998 audience development workshop for Montana presenting organizations, sponsored by the Montana Arts Council, program consultant and evaluator Louise Stevens customized her diagnostic tool for the BAP participants. Stevens had developed a version of her marketing and audience development capacity diagnostics especially for Montana's smaller and midsized arts organizations before the start of the BAP program, when she led audience development workshops for the Council. Now, she worked to tailor the tool to the realities of rural and small organizations. She had designed the diagnostics to be "pain free" organizational learning questionnaires, to be taken by staff and board members alike, so everyone could gain a shared baseline of skills, strengths, and areas to strengthen.

"The diagnostic was an essential exercise," said Fishbaugh. Simple, easy to use, easy to learn from, it helped us to translate theory into the practical. "It helped organizations reach different levels of understanding of their strengths and weaknesses." Its intent was to stimulate new thinking, help organizations understand what they needed to fix, and where risk taking just might work.

The program also employed a baseline organizational condition study to establish audience and participation counts and budget characteristics. The findings from the study were reported to the organizations and it—along with its companion economic impact analysis—showed, by region, the audience and economic pull of the arts organizations in Montana.

⁴ The Marketing Diagnostic. © 1998 by Louise K. Stevens, ArtsMarket, Inc.

BAP as an Organizational Development Model

Planning, setting benchmarks, and sticking to a plan throughout a multiyear timeline. These are constrictions on the way volunteers traditionally work. The informality and the smallness of many organizations and their towns are at odds with formal multiyear plans and benchmarks. "Small groups are generally driven by one or two people without succession plans," noted John Barsness, one of the BAP coaches. "Having them even talk about the next two years is hard enough. Getting them to agree to it and stick to things or follow a plan is very hard." In designing the program, Fishbaugh, Holt and Stevens had anticipated the challenges and assumed that any multiyear program would pose new challenges to groups that hadn't had prior experiences in strategic planning or setting long-range goals.

"We knew it would be hard," said Arni Fishbaugh. "In Montana, many groups don't do formal long-range planning. They don't even like the word: planning."



Performance, Glacier Symphony and Chorale.

But showing return on investment means setting goals, evaluating and finetuning strategies, and tracking change against a baseline. So, in essence, the BAP organizations had to become planners.

To push through the idea of planning, the arts council's first stage of the BAP program was strictly a planning grant and it paid for planning counsel and facilitation. This preceded the project implementation grants and targeted a larger pool of interested organizations. "If you are going to ask people to take planning seriously, you have to give them the resources to get excited," said Cinda Holt. "That \$5,000 in planning grant funds (to each of 12 organizations) got their attention. That's a sizable amount in a rural state like this." Typically, the Montana Arts Council's organizational development grants were capped at \$1,000. This sum signaled the depth of commitment the BAP program wanted.

The size of the grants to the final seven selected organizations also signaled serious intent. "We were interested in a meaningful investment, a significant investment, and in making it possible for the groups to really move forward with their plans," said Holt.

BAP coach Pam Mavrolas, who runs a Helena-based organizational development consulting firm, feels that "as an organizational development strategy, the process of preparing the letter of intent worked remarkably well."

Simple, straightforward planning and benchmarking-helping groups set annual goals for accomplishment—grounded BAP. The two-phase planning and implementation grants, which required annual evaluation and benchmarking, focused each group's organizational priorities. The benchmarking helped them take a hard look at their original plans. For example, the program's emphasis on annual self-evaluation and analysis of indicators of success caused many organizations to edit and cut back on their original plans. The Glacier Symphony and Chorale realized that its work in Bigfork, MT, was ultimately going to be self-sustaining, while its relationship with Libby, MT, did not meet expectations due to the distance between the communities. So it gradually focused more and more of its outreach to Bigfork, with great success. Alberta Bair Theater in Billings had planned outreach expansion into at least three outlying communities in the three-year period, but after learning how hard it was to sustain outreach in one community (Laurel), it slowed down and concentrated on building that relationship. The Hockaday Museum of Art in Kalispell had projected doing twelve relationship-building exhibitions in three years: it cut that back to four.

The planning process itself led to organizational introspection, especially among organizations that weren't prone to undertaking serious strategic

growth. "Our board was literally shocked into action. We were in cement shoes when we got the grant," said Susan Naive, board member of the Glacier Symphony and Chorale. "Many changes had to be made; so much so that we even had to confront the questions, 'Can we do the BAP project? Do we even want to?' We might not have survived without the incentives to change that the BAP program gave us. Now, we have progressed from being a local grassroots, mono-directional, micro-managed organization to the beginnings of a regional orchestral organization."

"We were very tired of formal planning, but we knew it had to be faced," said Joel Jahnke, director of Montana Shakespeare in the Parks. His organization's coach, consultant Micki Hobson agreed. "Joel had wanted to do this for a long time, and it would not have happened without the BAP process. There has been dramatic change as a result."

Planning and implementing something new is never easy. Talking about new approaches and then acting on them in a small community can actually be painful. "The *rural* in Rural America is a factor," said Pam Mavrolas. "Volunteers play a much more significant role than in more urban organizations."

Shifting volunteers means organizations can suddenly be under the local microscope. Newcomers come into a small organization, in a small town, with new ideas and new priorities, and can make it nearly impossible to stick to a multiyear plan and meeting annual benchmarks such as the BAP program required. "When you have new volunteers coming in, especially in a small town, the tail can actually hang the dog," commented coach John Barsness. "Things are always personality driven, and there are constant cycles because boards and volunteers are always in flux."

Volunteers and small town politics go hand in hand. People have strongly held beliefs, and commit themselves to the max. Glacier Symphony and Chorale, for example, came up against the very localized interests of the volunteers in Libby who wanted their support to be very focused on benefits to their community—not benefits that would extend to the symphony at its home-base in Kalispell. Montana Shakespeare in the Parks found that the volunteers in the communities it tours to throughout the state each wanted something different. "We thought we would be able to generalize, but we found that it is what those volunteers—our clients—each want that is important. It is a client-centered relationship," said Joel Jahnke.

Rural self-sufficiency is the backdrop for much of the organizational model that fears formal planning and just as equally shuns outside counsel. Both conditions posed particular challenges for the BAP program. Just how much change could counsel recommend? And when it did make pointed recommendations, would organizations accept the advice that was given?

Rural groups are used to isolation, and figuring things out as they go. They are wary of outsiders, and outside advice. Some simply won't use it. Pondera Players nicely, repeatedly, and firmly let the program know it didn't need any counsel from the assigned coach. It didn't want anyone stirring things up. As coach Linda Talbott said, "Their intention was to stay away from the program's whole (organizational development) process and procedure." The program stressed expanding the stakeholders, those committed to the organizations. But in a small town like Conrad (Pop. 2,200), with a community theater group where the board members rotated directing plays-a much loved opportunity—there were those that didn't want this kind of expansion and any unsettling experience of reshaping the entire organization that could be an unintentional by-product of it all. "There was no way any of them wanted to give up their ability to direct the plays," said Talbott. As it was, according to board member Mary Jane Kinyon, "BAP led us to changes we weren't anticipating. A few board members got upset and quit. Because of what we did through the BAP program-reaching out for more actors and backstage participants—we weren't so dependent on only a few individuals. This is a good thing. But we had to stay informal and low key about all of it."

Consultation, in the typical format of strategically used hours or days with the client, was a difficult gift for most of the BAP organizations. Consultants, called coaches by the program, were an intended source of objective wisdom for each participant organization. The grantees either asked for specific coaches they knew, or coaches were recommended by the Montana Arts Council.

Volunteer groups don't typically use counsel. The Performing Arts League in Choteau had a relationship going back over fifteen years with its coach John Barsness. But as he noted, "small town politics are such that unless you are there all the time, being able to intervene is difficult." In the end, the word coach itself was difficult. "I don't think the concept of a coach was understood," said Pam Mayrolas.

"The role of a coach needs to be more carefully thought out and worked out with the organizations," she said, cautioning that any rural arts organization would be likely to have similar problems understanding how to use counsel. "My sense is that the groups thought that a consultant is someone who tells them what to do, and a coach helps them think about what to do." Some groups wanted neither. "From the grantees' point of view, there was a fuzziness about: who were these coaches, what do they offer and how do we use them," said Cinda Holt. "I had hoped that the coaches would be viewed as a benefit completely separate from the arts council's grant. That their relationship to the client would be self-defining, and seen as independent and private. With hindsight, I see that I should have clarified our reasoning behind the coach idea much, much more at the start."

It is easiest to consult or coach when the client group has experience in using outside counsel. "The organizations that really succeeded in this process were the organizations that knew how to use consulting," said Cinda Holt. "There were a few who knew how to take away golden nuggets from the consultants, to influence the way they do business. The organizations that did the best were those that had strong relationships with their coaches. And the groups that really benefited had coaches who knew how to ratchet up the relationship."

Sometimes, there isn't really a "group" to act as a client. As Linda Talbott noted, "there was not a 'them,' with one group I counseled, but a single person. This organization was happy that they had one person who was taking on this thing—the BAP project—which to the rest of them was a granting process, not an organizational learning process. They were resistant to it being any more of a commitment."

"For some rural groups, building a comfort level with the outside coach is difficult," said Cinda Holt. Working with coaches, and being transparent with the primary funder—the Montana Arts Council—came hard. "We looked at ourselves as partners in the learning process," Holt continued. "We offered support through the coaches, and we didn't want to get involved in their relationship, or in any programming. The coaches had to walk the fine line between support and involvement in operational issues." When consultation is aimed at helping groups meet annual benchmarks, the lines between support and involvement are blurred.

"My role was really that of a reality check. I was there to assist them but not to micromanage." said John Barsness. Pam Mavrolas saw her role "much more as an evaluator. I helped them figure out what were their benchmarks were and what they needed to do to meet them. So I didn't talk that much with the boards; instead my role was such that they were able to have that conversation on their own."

As can be expected with informal and rural groups, a number of the BAP organizations had envisioned coaching as sporadic—ten minutes here, a board meeting there—rather than a formal relationship of a consultant who comes to town for an intensive series of meetings and working sessions. Some groups sought this. Others needed tremendous informality and flexibility. Some set dates with their coaches for planning retreats months in advance. Others responded better through occasional phone conversations. One of the program's best coach-organization partnerships was between Montana Shakespeare in the Parks and its coach Micki Hobson, in large measure because she had worked with the organization for years, through a

prior program—the NEA Advancement Program—and had won the trust of the staff and the volunteer advisory board. She knew when to push change, and when to back off from it. "Originally, we were planning to restructure the board," said Jahnke. "But Micki helped us go back over the past seven years and ask if the system really was broken. The answer was 'no,' so, 'why fix it?' became the next question."

Volunteer organizations that live very much in the short term are not by nature strategic planning oriented—something the coaches found as a real tension given the program's requirements of annual benchmarking and multi-year goals. Reflective sessions of thinking about building participation, building stakeholders, or deepening relationships with community worked with some organizations. In others, it was not of interest—they simply didn't want to get into discussions about theory and change—or the very process actually made the organization—as it was then constituted—implode. In still others, there were very straight-forward discussions of immediate priorities and that was that.

RAND's concepts of broadening, deepening and diversifying participation and stewardship were the structure behind the Montana Arts Council's grant guidelines for the program. MAC synthesized the RAND learning and provided this information and many other tools in the program so that the coaches were briefed on how the Wallace Foundation and RAND learning were key to the BAP program.

Even the BAP Leadership Institutes, where board-staff teams came together to reflect on many of the RAND principals, resulted in "minimal immediate changed behavior." Concepts such as broadening stakeholders was viewed "very narrowly," according to Linda Talbott. "They weren't as proactive as we had thought they'd be," said Cinda Holt.

Success came instead when the groups listened, learned, and went through a trial and error process. The BAP process required annual reports on return on investment and benchmarks. It was, in this way, "hugely valuable," according to the Performing Arts League's Ralph Paulus. "It made us test our ideas on the ground and look hard at the results."

Responding to the Three Rs.

Relevance

Organizational change begins with a philosophy. "There was a complete shift in thinking among these groups," said Cinda Holt. "Rather than thinking inward and focusing on just what their organization does, these groups started thinking outward, about their community as it related to their mission. That drove everything."

That's a sticky point in building participation. Often, it is a challenge to organizations and their artistic individuality. Do you really want to hear what the community wants?



Workshop, Custer County Art & Heritage Center.

These groups did. And they typically found that people wanted better working relationships with the organization and they wanted more relevance to their lives. "The focus groups that Alberta Bair Theater convened in Laurel was the best research they could have done," said Kathleen Benoit, the theater's former development director.

Alberta Bair Theater in Billings wanted to build a stronger audience among the surrounding small towns. These are towns (pop 1,000-6,000) that are so rural in mindset that Billings represents *The Big City*. The only way to get some people to come to the Alberta Bair Theater was to go to them. And, most importantly, to spend a lot of time listening and building relationships. Informal focus groups. Presentations at local service clubs. And most of all, work in and through the schools.

The Hockaday Museum of Art, in Kalispell, is another group that did a lot of listening. It found, in return, that one of the ways people got over their reticence about coming into an art museum was if they could see fine art that was collected by area residents. Carefully curated and of exceptional quality, the resulting exhibition piqued curiosity and established relevance. "I think the Hockaday Museum of Art is a great example of an organization taking the next step with the BAP research." said Cinda Holt. "They redesigned their exhibits, and also redesigned how the board functions, and took governance to the next level." By focusing periodic exhibitions on topics that Montanans in their region love and respond to-with themes such as: what collectors collect, gems (Montana is, after all, called the Treasure State because of all the gem stones mined from its soil), and the arts of fly fishing and fly tying—the Hockaday Musuem of Art built its membership, its visitors, and its financial base. Board President Mark Norley credits a lot of the success to listening to the public. "We tested different ideas. We now find that because of it all, the phone rings more and we have no space left to accommodate more staff. The problem is keeping up with it all!"

Building relevance isn't a sure, easy process. Sometimes the experimentations can create friction, as they did in Choteau, where the listening process opened a dialogue that created two camps among the Performing Arts League board. Each "heard" something different.

Their premise had been to use Malcolm Gladwell's book, The Tipping Point, as a primer on changing a community, and in this case, opening the community's willingness to experience a wide range of arts experiences. It backfired and fueled an organizational conflict, with deep wounds to small town relationships. People stopped talking to each other. Seeing each other at the town grocery store became awkward. "It was deadly for us," said Ralph Paulus, board chair of the Choteau Performing Arts League.

It started out fine. "We embarked on a series of meetings to listen to the community," said Paulus. They heard from audiences who had been increasingly interested in community residencies. In response, they scheduled and brought in the Liz Lerman Dance Exchange for a dance story project. (The community had done earlier story projects and liked them.) But there were a number of people on the board, and in the community, who felt that a better idea—more suited



Exhibit, Custer County Art & Heritage Center.

to the community—would be to put on a summer festival featuring some of the same artists who had already visited the community and with whom they were already comfortable.

Paulus felt such a festival wouldn't address the "deepening" theme they had decided on. Others on the board felt that by booking the Lerman company the league had strayed too far from current community tastes and interests. The board split with rancor, and the organization entered a hiatus because of the division. Paulus observed, "This community, four or five years ago, would have been very receptive to the Lerman company. But current attitudes are distinctly more conservative. Our community is 'cocooning' and less risk-taking, less tolerant of new ideas."

At first glance, one would think that the Liz Lerman Dance Exchange, the recent winner of an Americans for the Arts Animating Democracy leadership grant, would have been a perfect choice. But according to Ralph Paulus, Lerman's company had ideas that just didn't mesh with the community. "They spent a lot of time trying to involve the Hutterite Community, even though we tried to explain that the Hutterites could not participate for religious reasons. And though we tried to explain the importance of the schools, the company did not see the importance of schools in rural communities until after the project."

Perhaps, as Paulus reflected, the issue was bigger. "We did not anticipate the convergence of divides: urban-rural, reflective programming compared to a visceral audience, and a community dominated by conservative beliefs versus a genre that pushes boundaries." The majority of community members—largely high school students—who did participate didn't see their families in the audience because of those conservative beliefs.

Mark Browning, the director of Custer County Art & Heritage Center, talked about the pull and tug of tradition and change. "We can be cutting edge in what we do artistically, but as organizations—and as communities—we can be steeped in tradition and resistant to change." That's why the danger of getting out too far ahead of a board or support group is always there, and why any deepening has to be through developing relevance and relationships.

As Julie Sheppard, manager of the Choteau Performing Arts League pointed out. "Flexibility and continuous evaluation are important. Responsiveness to the community is a characteristic of organizational health. If an organization is too slow to change, it will dwindle." Evaluation needs to help organizations decide just how far they can take change, and how fast.

Relevant programming that is perhaps too accessible, too easy, can actually work against long-term audience development. A themed exhibition, for example, which brings in a one-time audience, may not do much to either deepen



Workshop, Performing Arts League.

relationships or to show a consistent expansion of audience.

"We had that problem with our Art of the Rocks show," said Hockaday Museum of Art board Chairman Mark Norley. "Participants there were not interested in the bigger picture and have not been seen again."

Browning agreed. "We've had the same experience where people come once, attracted by

some specific interest, but not again. We still hope to interest them again but with a broader offering than just a repeat of what got their attention before. Broadening the audience that way has a value to us locally. General familiarity reduces the intimidation factor."

Browning also has recognized the value of other one-time visitors—tourists. Hence shows such as Western Tack. "Our area's economy and population is diminishing and aging. We get no support from the city and \$1000 a year from the county. To stay alive, our main goal has to be to reach our audiences."

There are other elements to examine in building new organizational relevance. Through studying what it needed to do to build relevance, according to Mark Norley, the Hockaday Museum of Art changed its gift shop from "high quality local craft items to books. We now offer a selection of books reflecting our mission, including our exhibition catalogs and books on local artists. This

has led to increased revenue." It has also helped the museum "change from a community arts center into a real museum," according to Kalispell commu-

nity member Jenny Li.

Relationships

"Relationship building relates to fund raising. They are parallels," said Cinda Holt. "And you see results where the BAP organizations worked to build relationships. Most have new members, a much larger membership base."

Even though its BAP project focused on relevance through the work it undertook, the Custer County Art & Heritage Center built new relationships as well. To build deeper and more diverse relationships with its community residents, the center literally pushed its boundaries through the BAP program,



Exhibit, Hockaday Museum of Art.

with an expanded facility that houses distinct art and history wings. "It is hard to gauge 'is it worth it' in audience building and expansion like this, because the results aren't always immediate," said Browning. "We're seeing our image improved greatly because we have expanded to include history, and we've improved our appeal to a larger cross section of the population, which will gain us greater acceptance in the long run."

Browning has deep roots in his organization, from acting as a founding board member to his current role as the executive director. He's cautious of the work load that has grown for himself and his two other staff, because of expanding the historical collection and exhibitions. He notes that "If you row beyond your boundaries it can be dangerous." But at the same time he knows that Montanans value history as much as art. He knows his community values the rich history of Miles City. He's built strong working partnerships with the region's economic developers, and with area history museums, especially the Range Riders Museum. He's also built stronger and stronger educational programs which travel to schools and communities within a hundred-mile radius.

Browning works at building relationships one at a time, to get people in the door. And he knows that it takes time—sometimes years—to build those

relationships. The rancher comes into town on a Saturday and drops his wife and daughter off at the center. Maybe six months later, he'll come in for a show about the design elements of cars or motorcycles. Maybe a year later the family joins with a membership. Cultivation takes a long time. Browning specifically offers male-interest shows to build comfort with the rural ranchers and contractors. "When we were expanding, I had a hard time getting one of the contractor's employees to just step inside. He was very reluctant, indeed. There is a sissy factor to the arts, here. So we build that comfort level with aesthetic design themes that are everywhere—cars, furniture, clothes, tools, machines, bikes and motorcycles."

Building relationships in small towns can be particularly hard for organizations doing outreach into new communities to build a new base of support for the home activities. Small towns might resent organizations coming in and then leaving. They are wary. They take their time to warm up to the organization. The Glacier Symphony and Chorale saw that in Libby (80 miles away), where "we learned that Libby wants the orchestra to come and attach itself to Libby once each year, but it is not interested in funding the orchestra at its home in Kalispell," said Susan Naive. We thought we'd gain audience and supporters that would come to Kalispell. We didn't."

The Glacier Symphony and Chorale had hoped to build a cadre of volunteers, fundraisers, and active supporters in Libby who would view themselves as an extension of the symphony, and come into Kalispell. "Although Libby was only two hours away by road, it was further in reality," said Susan Naive. The music lovers in Libby were "happy to see the Libby Community Foundation book us to come in once a year, but not in this being a two way street."

In Bigfork—the other community that the Glacier Symphony and Chorale targeted to establish long term relationships with community members and



Performance, Glacier Symphony and Chorale.

groups—it was just the opposite. It is just close enough to Kalispell (20 miles) for residents to feel comfortable with affiliating with the symphony, and it is also close enough for symphony staff to be a regular presence. As a result, said Naive, "we have ninety new donors there, and a 60% increase in the number of season tickets we sell there for Kalispell concerts."



Workshop, Custer County Art & Heritage Center.

Through its BAP work, The symphony has become enough of a presence there to get past the wariness of localities, with a regular August program, and an expanded year-round chamber music series. It has also worked to involve and engage Bigfork residents through its fund raising. It has taken a nucleus group there, and worked to broaden their circle of friends. "We send out invitations for our fund raising dinners in the name of one of our new Bigfork supporters," said Naive. "The

goal is for them to each bring eight other couples to the event, and it works." The relationship, and ownership is built with growing circles of friends.

Bill Fisher, the past executive director of the Alberta Bair Theater, gave the secret to success they had in building an audience in neighboring rural Laurel from 711 tickets a year before the BAP grant, up to 1,337 a year by year three of the grant. "We needed to be there, a lot," he said. It had to become a local fixture. It had to "do" a lot for Laurel residents, not just make a couple of Chamber of Commerce and Rotary speeches and then expect people to drive over to Billings. Fisher learned that "we had to structure things as the big guy doing things for the little guys. Building arts participation outside of the city limits brought statistical and direct changes to our thinking and approaches. We came to realize, for example, that we had to be in the Laurel schools, and the grant let us get in there with residencies. So, we bought a fifteen-passenger van to get us out into the community to do residencies." Face time, real engagement with the community and constant presence were what finally got people in Laurel to see the Alberta Bair Theater as "their" theater.

The theater had hoped to identify a volunteer in Laurel to take on the coordination of outreach. That didn't work, so the job fell to the ABT education director, who already had a good working relationship with the Laurel schools. Through the schools, ABT sent home school newsletters, takehome packets to students, used direct mail to Laurel educators and posters in teachers' lounges to build visibility. The methods worked, in comparison to other strategies ABT tried such as brown bag lunches with Laurel community groups, which according to Fisher, bombed. "Attendance was negligible and we ended up canceling that portion of BAP activities."

One of the results of the constant work in Laurel was that the Alberta Bair Theater "rethought what 'rural' means for our organization," said board member Sherri Cornett. At the beginning of the BAP program, the theater had hypothesized establishing relationships with communities thirty to fifty miles away. Now that it knows how much presence and consistent visibility is needed in each rural community, it has determined that a hub-and-spokes approach makes sense in working with any community. "Laurel is only ten miles away," said Cornett, "though by the way it defines itself it might as well be thirty miles away. We are now looking at other communities nearby that are even smaller than Laurel."

The new approach now being tested by the Alberta Bair Theater involves using Laurel as a hub, and with their newly purchased bus, bringing artists to schools in the surrounding towns that are only a few miles from Laurel, and then using the bus to get those rural students into the Alberta Bair Theater for performances.

Another outcome of the BAP grant, in addition to the bus, was that the Alberta Bair Theater set up a simple ticket outlet at the grocery store in Laurel. "Rural residents come into town on Saturday to shop," Cornett noted. The Alberta Bair Theater hopes that by making it easy to purchase tickets at the grocery store, it will encourage those even more rural residents to occasionally come into town for a performance.

The Alberta Bair Theater board became very involved in the rural outreach, once they began to realize just how hard it was to build lasting relationships with their surrounding small communities. "The board put a lot of effort into this," said Cornett. "They began to research the different strata of the communities involved and how communication really happens on a regional level." They used models of regional development agencies, and schools, to study how the word gets out and how people get involved. It used the rural schools Curriculum Consortium as a resource, as a method of building relationships with individual teachers and the very small schools scattered throughout surrounding towns. "Laurel is the largest member of the consortium, and so through it, the experience of the Alberta Bair Theater partnership is being shared with the rest," said Vi Hills, who is a Laurel educator and—through the BAP partnership—a new Alberta Bair Theater board member. "The education community is key to the success of a project and building a relationship in a small town."

Small towns revolve around their schools. Seniors with no children at home are as likely to be on the school bleachers for basketball tournaments as the parents of the team stars. Choteau's Performing Arts League recognized that its long-term success would need to come from deeper work with students in



Speaker's Bureau, Custer County Art & Heritage Center.

the schools, leading to a community event or celebration at the end. It wasn't what the board wanted—in part causing the split over the summer festival idea—but it works. "Our community is our school," said Julie Sheppard. "Schools are essential for building audience. Our series tickets are down, but our residencies are great." People didn't come to the Liz Lerman Dance Exchange performance, but the residency resulted in the school Valedictorian—and state Wrestling Champion—choosing to dance his commencement address, no small measure of impact in a rural, highly conservative Montana farming town.

Return on Investment

There was unquestionable growth in arts participation through the BAP program. Sometimes, the audience growth didn't even need the key elements of the original grant applications. Montana Shakespeare in the Park's plan was to geographically expand its summer touring sites, not necessarily to "think about each audience." Pondera Players' goal had been to use the grant's allowance for a new bleacher seating system to become a great entertainment destination and thereby build its audience numbers.

But along the way, the Pondera Players (in Conrad, population 2,600) used the Marketing Diagnostic to "identify things we did that needed improvement," according to board president Phyllis Phillips. "We knew we needed to expand our pool of players. So we sent out direct mail survey cards, created a database, and inputted what the community wanted. Our production of 'When Harry Met Sally' had 43% new cast participants, the audience was 250 for each of the three nights, and we had to turn audiences away!"

Throughout the BAP grant process, Pondera Players increased its audience by more than 25%. It forged a strong collaboration with its local arts council.

Ironically, the capital investment it had original sought funding for through the grant—bleacher type seating that would improve sight lines for the audience—proved to be not all that important to success, although the group had passionately believed that the new seating system was essential. "In the end, the elevated seating was not all that important," said board member Mary Jane Kinyon. "Yes, it was a drawing card and a catalyst. But our organization benefited more from the process we went through than from the new seating. We didn't even use it for our last—and very successful—production."

Montana Shakespeare in the Parks changed its desired outcome from geographic expansion to a commitment to excellence in the way they relate to each community. "Before BAP, we really didn't focus on how many people came to Montana Shakespeare in the Parks," said Joel Jahnke. "Before BAP, building audiences was never a priority. Our previous goal was just to get through financially from June to September, our summer season. Now, our goal is to build—really build—audiences." For Jahnke and his staff, the grant writing process itself started the change. "The grant writing process was very, very arduous. But it planted the seeds of change. It forced us to realize the isolation of the administration within the company. The company had a great relationship with audiences, but we did not. So we changed our approach. And in doing that, we learned that we have to forge client-centered relationships,



Puppet Show, Custer County Art & Heritage Center.

wherever we are. It's what the client—the local community—wants that works. We thought we could generalize, taking stuff we did in Choteau to build the audience there and apply it to Miles City, but that did not work."

Montana Shakespeare in the Parks also learned that core mission and values are directly linked to audience development. "Before we started this," said Jahnke, "we thought that our goal should be to get bigger. Through the BAP process, we saw that what we should do is get better, doing our best, forever." Because the open spaces where Montana Shakespeare in the Parks performs offer ample opportunity for audience growth, "we will never reach capacity. But we will keep focusing on doing our best."

Doing good work meant that return on investment with these organizations was extensive.

- Total attendance among the BAP organizations and planning grantees grew by 30% from 2002-2005.
- BAP organizations increased the number of events they held each year by 24%.
- BAP organizations increased their endowments 48% during the three-year period.
- BAP organizations increased their cash reserves by 14% to prove their fiscal prudence.

Sustaining that return was a big goal of the BAP program. It is hard, for sure, to look into the future and see if the learning, change, and new practices that BAP helped create can be lasting realities for these organizations.

In part, that's because the BAP organizations, like nonprofits everywhere, saw their share of staff turn over during the three and a half years of the grant. In some cases, the growth and change of programming literally made the leadership chair a hot seat, pushing the leader out. In others, the natural movement of staff members in and out of the job meant that the BAP program worked with three staff leaders in three years—and those individuals left by the time the grant program ended. So, was all the BAP work lost with them?

"It is an absolute that turn-over in staff will impact anything we do for a long term project like this. And there is real pain to see some of the steps taken and then things stall out," said Arni Fishbaugh. "But turnover reinforces the reality that there has to be more than one champion within the organization at all times who carries the torch."

One of the ways the Montana Arts Council worked to expand the leadership was the creation of a leadership institute for professional development. Organizations were required to send board/staff teams of four or more to

attend various workshops, which proved difficult for many groups. But Fishbaugh sees that participation as just one pathway to counsel. "Some of these groups were working with their coaches on the same topics, and their hands were full with the consultation and the BAP process. But it all fit together because, either way, the BAP program recognized and promoted the theme that teams rather than individuals were important."

More people through the door requires more staff, more volunteers. The Hockaday Museum of Art, for example, has been stretched hugely by the growth seen from the BAP program. They changed the way the board operated, moving to the use of an executive board that meets monthly with a full board meeting every quarter. They changed the board focus to development and away from day-to-day supervision. They created a guild to build the volunteers into a formal program.

At the Custer County Art & Heritage Center, Director Mark Browning said "I am waiting for the crash of trying to do too much, and fearful of the load. There is constant pressure to grow. Is growth always a good thing? If you go beyond your boundaries it can be dangerous."

Many organizations used the BAP program as a time to stabilize staffing. According to Mark Nolan, the Hockaday Museum of Art immediately saw that "staff turnover had been a problem, and a major goal was to offer sufficient salary with benefits to help retention." The museum's membership expansion, realized through the BAP initiative, meant "we have been able to retain three key employees as FTEs plus some part timers, with benefits."

Montana Shakespeare in the Parks used its BAP program to strengthen operating methods and share leadership, as well. Micki Hobson, their coach, noted, "Internally, if Joel were to leave now, there would not be a major collapse and rebuild. The strength will continue beyond BAP."

Only one BAP organization has felt negative or destabilizing impact through its work that will take continued time to sort through and rebuild. Every one of the other organizations has been able to increase staff or key volunteer core, increase programs and services, and expand audience depth and geography. By making the work of participation building central to their missions, these organizations have dramatically increased their value to their communities and public.

Return on Investment Accomplishments

The organizations that participated in the Building Arts Participation program showed significant statistical ability to expand their support base. Even more impressive, they far outpaced comparison groups—in this case the organizations that had received planning grants, but had not gone further in the program.



Workshop, Performing Arts League.

Small organizations don't always show their growth in budgetary terms. Nor do they get frivolous when they get a grant. Take, for example, the total amount these groups spent on the task of marketing directly related to their participation goals over the course of the grant period within the stated program. Small amounts of money went a long way toward building participation through these broadening, deepening and diversifying strategies:

BAP Projects Cumulative Marketing Expenditures

\$1,452
\$2,511
\$6,855
\$9,075
\$8,863
\$7,000
\$7,157
\$42,913

Most of these organizations were able to nearly triple the cash amount they spent on marketing through in-kind services. Additionally, between them, they allocated about \$30,000 in personnel or contractors for marketing over the course of the three years. In most cases, existing staff took on the work of building participation. In part, the organizations were conservative in spending money on marketing and related staff because they didn't want to artificially inflate and then have to drop staff after the grant period. A lot of the counsel given by coaches and discussions consistently raised through the annual evaluation process was around sustainability: gradually and carefully growing the infrastructure to a level that could be maintained after the grant period. The groups followed through.

That said, the average operating expenses of the BAP groups grew considerably—18% within the three-year period. Where did the funds go? Much of it went to overall marketing by the organizations, outside and beyond their BAP projects. The total spent for all marketing by these organizations,



Quick Draw, Custer County Art & Heritage Center.

including their BAP work, was on average \$170,000 a year throughout the BAP program. Other budget expansion was specific to programming and services, outreach and education, administrative personnel and increased operating overhead. The desired outcome of increased capacity with more than one staff person to carry the load was realized by a few of the organizations, generally with the addition of new part time positions.

From the time that baseline data was collected in 2002, to the end of Fiscal Year 2005, 100% of the twelve organizations who participated in the planning grant phase and/or the project implementation phase reported increased activity. As an aggregate, the groups reported a 30% increase in attendance, 7% increase in single ticket sales, 20% increase in subscription ticket sales, and 5% increase in touring fees. Overall, the groups' operating budgets increased by an average of 12%.



Parade, Montana Shakespeare in the Parks.

Essential Elements of Success

The realities of rural organizations, with strong volunteer structures balanced by small town politics, cutting edge art balanced by conservative and sometimes old-fashioned views on governance, budget and administration have shaped the BAP organizations and are likely to be as real to any small and rural organization in the country.

What are the equally real elements of success that any organization should work towards in deepening, diversifying, or expanding audiences?

Structure any project to build collaboration, partnership and a higher level of communication.

"Collaboration and communication were essential components to this project," said Bill Fisher, executive director of the Alberta Bair Theater. The theater developed lasting partners within the Laurel Public Schools administration, especially, that allowed us to send home take home packets about the theater with all students, insert information into school newsletters, and post information on school bulletin boards.

Custer County Art & Heritage Center Director Mark Browning agreed. "By developing new relationships with interests and other (historic) museums in Miles City and the area, our image improved greatly because we connected more to the individuals associated with those groups." New goals develop out of conservation, review, and future program planning with these partners.

Understand the culture of the community that is targeted, and respond accordingly.

"We got to know the Laurel culture," said Bill Fisher. "It took a lot more onthe ground time than we anticipated." Likewise, the Glacier Symphony and Chorale learned that the Libby culture was too inward driven. The town of Libby was so insular that the symphony couldn't cultivate an audience to come out of Libby to head over to Kalispell. It could succeed in Bigfork, however, a community with lots of newcomers looking for culture, willing to make the drive and eager for affiliation.

Choteau's culture was simply too conservative to mesh with the vulnerability of playing out life stories through dance with Liz Lerman's Dance Exchange. Residents had, in the past, been fairly comfortable with a literary storytelling project and very comfortable with a drumming project. But it could be that "dancing their stories" just went too far for this conservative community, and that the programming got too far away from them.

Combine relevant programming with the right place.

The Hockaday Museum of Art mastered relevant programming, as did the Custer County Art & Heritage Center. Sometimes it came at a price. Mark Browning mused that, "in diversifying our audience through exhibitions on design elements of cars, motorcycles and tack, it seemed that some of the new audience gained was at the expense of established audience lost. While this broadened our appeal to a larger cross section, attendance numbers didn't always grow proportionately. But you still have to hope it gains us acceptance in the long run as well as improved strength related to public funding."

In rural communities, the "right place" is most often the schools, followed by parks. Glacier Symphony and Chorale learned that summer park concerts in Bigfork created the sense of shared community and celebration needed to then create new donor pools. Both the Performing Arts League and Alberta Bair Theater found that they had to be in the schools. Alberta Bair Theater tried and gave up on brown bag lunches and events in Laurel outside the schools. The Performing Arts League learned that its public programs have to follow extensive school residencies for an audience to turn out. "We now know that the Performing Arts League is a residency organization. A performance is a celebration at the end of a successful residency, but it is of secondary importance. Our community is our school, and school is essential for building audience," said Julie Sheppard. "We've learned this is a great approach."

Recognize the essential role of volunteers and don't overwhelm them.

Montana Shakespeare in the Parks found early on in the BAP program that it was easy to overwhelm the volunteer tour coordinators as it tried to provide them with better and increased marketing tools and PR methods to make each event a total success. The extra "help" became viewed as "extra work." Coach Micki Hobson said that one of their original goals was to "bring together the tour coordinators and have a greater relationship with them, but without



Exhibit, Custer County Art & Heritage Center.

expanding staff. More workshops, meet and greet people, and get them to do more work so we can expand sites, and wanting the experience in each community to be deeper, and the audiences larger." In the end, Joel Jahnke said that the company instead "changed our approach from what we thought the tour coordinators were going to do for Montana Shakespeare in the Parks to what we could do to help them." It was a much more time consuming process, and meant that Montana Shakespeare in the Parks did have to add that staff position it had hoped to avoid-a community relations directorand it had to customize what it did to work with each group of volunteers, each community. But the advantage, according to Jahnke, was "increased sponsorships and new business partners."

Pondera Players also learned to be careful about nudging volunteers too much. In reaching its goal of recruiting new talent to act, direct, and technically support productions, it upset the well established balance of "who gets to do what" within the organization. Another community theater actually started in this small town as an offshoot of the BAP program-disgruntled volunteers who moved off to start a competing theater. But even so, Pondera Players is a stronger and larger group, with a great new talent pool.

The Hockaday Museum of Art, as well, had originally thought it could accomplish all its membership growth and increased attendance keeping its small staff and relying on volunteers. But, according to President Mark Norley, "We ended up hiring a community director to help with building local donations and to promote the Hockaday Museum of Art as a destination museum." The tasks came to require more consistent and focused work and energy than volunteers could be asked to provide.

Reach geographically, but not too far. Use hubs and spokes.

The desire to serve towns far and wide is natural. Alberta Bair Theater had intended to be working in a half dozen towns within an hour circumference from Billings. Glacier Symphony and Chorale went the 80 miles of winding mountain road to Libby. Montana Shakespeare in the Parks was adding new towns to gobble up every dark night between May and September. Hockaday Museum of Art was being courted to open an outpost in Whitefish, an affluent community about 15 miles north of Kalispell.

Each organization learned that geographic distance is a real factor to overcome. Towns even ten miles away have entirely different cultures and priorities. It is essential to find a group of activist volunteers in those towns, build them in size and energy, and provide them with enough on-the-ground time and cultivation to give them the courage to become true volunteers on behalf of the organization.

It takes enormous time. Both Glacier Symphony and Chorale and Alberta Bair Theater have learned that hubs and spokes are better than outreach to distant outposts all throughout their regions. They've learned to create centers of strength where they become well known, where they develop great word of mouth, and where they can spend enough time over enough years to get past being that "out of town" group. Only then, they learned, is it possible to use that new town as the hub, reaching out to all the smaller communities around it.

Recognize the realities of staff and volunteer turnover, and make sure more than one person is carrying the torch.

Initiatives, no matter how well funded and enthusiastically received, are just initiatives—not absorbed into the cultural of the organization—if only one or two people are involved. Staff turn over is an absolute reality in the field. Volunteers as well as staff members burn out.

The Glacier Symphony and Chorale saw three executive directors in the course of the BAP program, and would never have been able to steer the

course of their growth in the Bigfork market were it not for a board that came together around the BAP program, worked and learned together. "We restructured our board meetings and financial reporting and it had a positive effect on everything," said Susan Naive." The Alberta Bair Theater's executive director and development director both moved on to new positions after the BAP program, but its board has taken on the job of market research—what past Director Bill Fisher referred to "learning about the communications and cultural systems" of small communities so that it can continue on this path through a transition and with a new leader.

To manage its growth, the Hockaday Museum of Art board did serious soulsearching and worked with a facilitator to evaluate what it needed to do to support the organization. "Our board was completely restructured and reactivated," said Mark Norley. It separated out an executive board from the full board, gave each a different set of tasks and time tables, and also



The Laurel Ticket Outlet, Alberta Bair Theater.

established a guild to work on volunteer functions, again freeing up the board to concentrate on governance. The Performing Arts League's board "now needs real board development work," says Ralph Paulus. After the turmoil it went through only a few of its remaining board members are active and vocal.

The Montana Arts Council had anticipated some of the organizational impact of building participation. "At the outset, we expected change, but didn't expect major organizational change," said Arni Fishbaugh. "We had to be sensitive to how we approached that."

Too much outreach growth for the Glacier Symphony and Chorale, for example, has had an impact on the orchestra itself. "You can only push so far," said coach Pam Mavrolas. After riding the bus for long hours, the musicians rightly started asking for compensation. Paid at a per-service rate, they also started saying they couldn't keep their other "day jobs" if the

orchestra demanded more and more of their time—but not enough time to make the symphony a full time job.

The Alberta Bair Theater's investment in a remote ticketing system and a bus to carry artists to residencies and community members back to the theater also set up a long term change—a capital investment and commitment to new ways of operating that has to pay back over a long term.

Some organizations are actively wary of the organizational change from increased attendance. Custer County Arts & Heritage Center didn't hire more staff, preferring to stay lean and not increase operating overhead and fixed expenses. Director Mark Browning knows full well that he has taken on manning the front desk and visitor services at the same time as running back to his office to manage the center. That's his choice. Rather than risk having to potentially lay off staff at the end of the BAP project, he'll do it himself.

Evaluate Progress and Make Changes as Needed.

The annual evaluation process, which required tracking the program's "return on investment," was not easy. No organization likes to fill out annual grant reporting paperwork. Here, in addition to the paperwork, there were annual calls with the program evaluator, and e-mail newsletters promoting benchmarking and evaluation. The program required annual evaluation and documentation. And, of course, one of the program prerequisites was planning.

"We learned that the planning timeline was way too short," said Cinda Holt. Especially for organizations that did not have a history of planning or organizational cultural around planning and evaluation, the initial work was very hard. "The planning process to develop a prospectus was extended to nine months," said Holt, "and it made us wonder if we had, in our minds, set goals that were too ambitious and if we had thought there would be too many annual changes."

In hindsight, the prospectuses (the final grant applications) were in most cases overly ambitious. Too many exhibitions, too many different communities served, too many new outreach partnerships established. They were overly optimistic about what could be accomplished in three years.

On the other hand, the grant applications understated audience, participant, and membership growth. Most of the BAP organizations understated what they thought they could accomplish, almost to the point of being caught off guard. Through the evaluation process they had to ask themselves just how they were going to manage all those newcomers. In response, organizations

like the Hockaday Museum of Art added staff members specifically to address the larger constituency. The Alberta Bair Theater set up a board committee exclusively devoted to Laurel.

Absorb a Participation-Building Culture. Live it.

Building participation is hard work, and on-going work. A single season or great one time outreach doesn't work, as these organizations have certainly proved. Success comes incrementally, but it really does happen. The challenge is in staying the course.

To do so, organizations need to be in the on-going business of building participation. The diagnostic tool⁵ used by the program asks organizations a number of questions about, "Is audience—or the concept of developing and growing audiences and participation—within your mission, purpose, or core operating philosophy and statement?" It goes on to ask, "Is audience development or building participation (philosophical, not just tactical) a standard part of discussion at each board meeting?"

Throughout the process, organizations went through periods of frustration in talking about building participation with their boards. Professional staffs are often nervous about boards micromanaging marketing, getting into too-detailed discussions about where ads should be placed or the cover art for a season brochure. When the program's annual evaluation kept pressing the point of mission-based discussions about participation at the board level, some directors stressed early on that they didn't want their boards involved. "Keep this to the professionals who know the business," said one executive.

But after three years, it is remarkable to see how many boards have gotten involved in on-going participation discussions, and have taken a mission-based approach to on-going audience development. The once "hands off" Montana Shakespeare in the Parks advisory board now "routinely gets participation-building questions from staff members," said Micki Hobson. Alberta Bair Theater set up a committee whose entire job is to reflect, research and develop strategies for lasting outreach.

The Hockaday Museum of Art added a guild to provide the volunteer power needed to keep outreach alive. The Glacier Symphony and Chorale established an on-going Bigfork program and steering committee. "Ultimately, we may be building an audience for thirty years from now," said former BAP project manager Sherry Parmeter. "We have to find ways to structure this for the long term."

⁵ The Marketing Diagnostic. © 1998 by Louise K. Stevens, ArtsMarket, Inc.



Workshop, Performing Arts League.

Create Something Sustainable.

The Hockaday Museum of Art's Director Linda Engh-Grady looked with pride at the new exhibits and new organizational structure her organization has committed to. It has changed dramatically through the past three years. It won't go back to the ways of the past. "Now what we do has to be sustainable. It has to be a part of our strategic vision."

For any organization, in any community, the task of sustaining and maintaining momentum in growing participation will always be challenging. "Audience numbers are being threatened across our society, and we're no exception," said Mark Browning. "The new consumption of elective time by electronic and computer networks means that everyone is busier and attendance numbers often reflect that. It is hard to gauge "worth" in audience building. Is it worth it? Absolutely. Is it a lot of work? Yes. The results aren't always immediate. But we constantly have to strive for improvement, or this new reality will never change."

Rural and small organizations are not immune to the iPod world. Drive a rural road and count the satellite dishes. Check out the backcountry trucks with XM music channels. The competition is everywhere. The need to build community is just as strong here as in urban centers facing the same media phenomena. What better way to reinforce the value of community than through the power of many—in the very social form of audiences and groups participating in arts events?

Talk to the residents whose volunteer efforts are required to address just about every need in their rural communities. Raise money for the rural fire department. Build a new ice rink. Build a new arts center. Travel with the soccer teams. Sit on a municipal commission. Raise money for the library. Usually, the same people take on all these tasks because there literally is no one else to do it. In a small town, nonprofits are everybody's responsibility.

The dedicated are often maxed out, and need to truly believe in the value of a cause before they take on one more challenge. Clearly, BAP organizations were convincing and made the case for more involvement. The Laurel parents added the Alberta Bair Theater to their causes. The Bigfork residents added the Glacier Symphony and Chorale to theirs. The Miles City ranchers, taking a tank full of gas to come into town and back, added the Custer County Art & Heritage Center to their causes. The Conrad residents added the task of working backstage and making costumes to boost Pondera Players' capacity, and the players became a deeper part of the community fabric.

A few of the Montana communities in which these organizations work are growing rapidly. There are plenty of newcomers to take on the jobs, plenty of new money flowing into town. But in communities that have been small for decades, suddenly realizing rapid growth, there is so much to do—basic infrastructure to build—that the arts could well be pushed off, while other causes come forward.

In the communities that have experienced the Three Rs of the Building Arts Participation program (relationships, relevance, return on investment), that is not likely to happen. These organizations have built tremendous new value. While small in budget scale, they are as established and essential to the lifeblood of their communities as a major arts institution in a major city.

The giving patterns are beginning to show this. The Hockaday Museum of Art just received a \$50,000 bequest from a member's estate. The Alberta Bair Theater received a one million dollar bequest for its endowment. The residents of Kalispell are well on their way to funding a new performing arts center to house, among others, the Glacier Symphony and Chorale. These small organizations are developing the capital, and the endowments, to be lasting assets in their communities.

By building value, they are securing their future. They've turned their thinking from inward to outward, and put their communities first above their own interests. They rose to the challenge and are true models of how to build arts participation in rural America—which is the ultimate goal of the Montana Arts Council's initiative through funding from the Wallace Foundation's START program.

THE BAP PROCESS

Letter of Intent

Montana arts organizations were invited to submit concepts for building participation among rural or underserved audiences through one of three pathways—broadening, deepening, or diversifying their audience or public.

Planning Investment Awards

Twelve organizations were selected based on their letters of intent to participate in a nine-month planning process. Each was awarded a planning investment of \$5,000, of which \$1,000 was dedicated to funding work with their coach/consultant.

Planning Process

Planning work had to involve appropriate research and dialogue with the targeted potential audience and link directly to each organization's own mission. The final plan, or prospectus, had to contain all the elements of a business plan.

Prospectus Submission

Eleven of the twelve planning investment recipients submitted prospectus business plans for their intended initiative. Of these, seven organizations were selected to receive multi-year investments.

Annual Evaluation and Planning

Each of the seven organizations set annual benchmarks and conducted qualitative and quantitative evaluation of their progress.

Sustainable Outcomes

Each organization was encouraged to set realistic annual increased income goals at the outset. Over the two and a half year course of the BAP investment, they needed to demonstrate the ability to locally earn—through earned or contributed income and in-kind services and materials—increased revenues. Each organization had to show that it can sustain this new revenue, annualized, beyond the grant period and without the expectation of further BAP investments.

Contact Information

BUILDING ARTS PARTICIPATION GRANTEES



Bill Fisher, Shemi Cornett, Bess Snyder Fredlund, Vi Hills, Kathleen Benoit



Mark Browning, Jan Bastian, Betty Currie



Pam Mavrolas (coach), Amy Smith, Jennifer Lee



Pam Maurolas (coach), Linda Engh-Grady, Mark Norley



John Barsness (coach), Ralph Paulus, Julie Sheppard, Myrna Paulus



Phyllis Philipps, Mary Jane Kinyon



18 Bancroft, Kathy Jahnke, Joel Jahnke, Micki Hobson (coach)

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Custer County Art & Heritage Center

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Glacier Symphony and Chorale

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Hockaday Museum of Art

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Performing Arts League Inc

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Pondera Players

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Montana Shakespeare in the Parks

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Selection Panel Members for both the Planning Grants Panel and the Project Implementation Panel

Bob DePratu

State Senator (1997-2005) (R), auto sales business, Whitefish, MT

Dave Lewis

State Senator (R), prior state budget director and House Representative, Helena, MT

Chas Cantlon

social service organization director serving people with disabilities through employment opportunities, Ronan, MT

Rick Halmes

Montana Arts Council member and panel chairman, Billings, MT

Robert Booker

former director, Minnesota State Arts Board, St. Paul, MN (current director, Arizona Commission on the Arts)

Building Arts Participation Coaches

John C. Barsness, Bozeman, MT Coach for Performing Arts League and Bozeman Symphony (planning grant only)

Jan Bastian, Miles City, MT Coach for Custer County Art & Heritage Center

Michalann (Micki) Hobson, Kure Beach, NC Coach for Montana Shakespeare in the Parks

Pamela Mavrolas, Helena, MT Coach for Hockaday Museum of Art and Glacier Symphony and Chorale

> Bonnie Sachatello-Sawyer, Bozeman, MT Coach for Alberta Bair Theater

> > Linda Talbott, Missoula, MT

Coach for Pondera Players, Sunburst Community Foundation (planning grant only), Emerson Center for Arts and Culture (planning grant only), Bigfork Community Players (planning grant only)

Montana Arts Council 2006 Members

Jackie Parsons, Chairman, Browning
Cynthia Andrus, Bozeman
Ann Cogswell, Great Falls
Mary Crippen, Billings
John Dudis, Kalispell
Rick Halmes, Billings
Delores Heltne, Havre
Betti Hill, Helena
Tim Holmes, Helena
Neal Lewing, Polson
Rob Quist, Kalispell
Kevin Red Star, Roberts
Kathleen Schlepp, Miles City
Youpa Stein, Arlee
Wilbur Wood, Roundup

Montana Arts Council 2004 Members

Bill Frazier, Chairman, Big Timber
Ann Cogswell, Great Falls
Mary Crippen, Billings
John Dudis, Kalispell
Rick Halmes, Billings
Delores Heltne, Havre
Betti Hill, Helena
Kari Lee Knierim, Glasgow
Neal Lewing, Polson
Stan Lynde, Helena
Marilyn Olson, Sidney
Jackie Parsons, Browning
Linda Reed, Helena
Jennifer Earle Seifert, Troy



Back row left to right: Alexandra Swaney, Arlynn Fishbaugh, Kimberly Baraby-Hurtle, Stefanie Flynn, Beck McLaughlin. Front row left to right: Carleen Layne, Kristin Han-Burgoyne, Cinda Holt.

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Carleen Layne, Deputy Director and Accountant
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Alexandra Swaney, Folklife Director
Beck McLaughlin, Arts Education and Web Services Director
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