

STRATEGIES FOR DEVELOPING ORGANIZATIONAL SUSTAINABILITY: LONG-TERM RELATIONSHIPS IN THE ARTS

**THE NATIONAL BLACK ARTS FESTIVAL AND THE WOODRUFF ARTS CENTER
PARTNERSHIP DEVELOPMENT PROJECT**

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The impetus for this research was the desire of the National Black Arts Festival (NBAF) to learn more about the long-term relationships of other arts organizations to inform the negotiation and development of its own relationship with the Woodruff Arts Center and its divisions—the High Museum of Art, Atlanta Symphony Orchestra, Alliance Theatre, and Young Audiences. A secondary reason was to share the lessons learned with other organizations in the arts field as they navigate the terrain of long-term relationships.

Background

The National Black Arts Festival (NBAF) board and executive staff leadership considered a range of diverse strategies for building organizational capacity and sustainability. Over the past few years, discussions between NBAF, the Woodruff Arts Center (The Woodruff), and local supporters has resulted in a sustainability strategy that considers NBAF and the Woodruff in a more formal relationship.

During this same period, the Animating Democracy/Working Capital Fund Exemplar Program provided support to 12 small to midsize arts and cultural organizations nationally. These groups have been recognized for their work in their communities and in the field based on their participation in two Ford Foundation-supported initiatives—Americans for the Arts’ Animating Democracy program and the LarsonAllen Public Service Group’s Working Capital Fund.

The Exemplar Program provides two-year support for participating organizations to build on and sustain their work. An additional pool of funds enables organizations “to design special initiatives outside of their core work that build organizational knowledge and/or capacity or enhance approaches to creative, civic engagement, or organizational work in the long term.” This additional support also provides for learning activities that can be shared with the Exemplar Program cohorts and the broader field.

NBAF was selected for participation in the Exemplar Program and also received additional funds for facilitation, documentation, and research related to the development of a long-term relationship between NBAF and the Woodruff Arts Center and its four divisions. The research component of the project was designed to investigate other partnership efforts nationally that might inform the NBAF/Wodruff process and the field.

The NBAF / Woodruff Partnership Development Process

NBAF, the Woodruff, and the Woodruff divisions have been engaged in the development process since September 2005. The end goal is to develop a relationship that has the potential to build NBAF’s organization and artistic capacity, while also reaping benefits for the Woodruff. It goes without saying that partnerships and sustainability can be both complicated and complex, with a diverse range of strategies to achieve goals. This might include a partnership or sustainability strategies focused on an organizational, program, or project relationship, or centered on economic, artistic, physical, or creative space.

With this in mind, full institutional partnership between NBAF and The Woodruff is envisioned as:

- Each organization retaining its voice, identity, brand, decision-making power, and aesthetic;
- Ongoing opportunities for collaborations on the development and presentation of major artistic projects and collaborations in marketing and fundraising that have increased financial support for both organizations;
- Higher levels of visibility locally and nationally for all organizations and artists;
- Enrichment of the cultural offerings of the Woodruff through its embrace with NBAF;
- Use of consistent professional spaces by NBAF for artistic development and presentation;
- Development of and increase in new audiences for both organizations;
- Board exchange among partners that allows for closer bond and understanding; and
- Creation of a learning environment for both institutions.

The NBAF/Wodruff approach has been refined to be implemented on two parallel tracks. *One track* is the development of a collaborative project—a “big idea.” The focus is intended to allow NBAF and all the Woodruff divisions the opportunity to work together on a concrete project from late Spring 2007 through 2008. The outcome of this process is intended to inform and define the way in which the group as a whole might continue to pursue collaborative efforts that benefit all participants. It is believed that this strategy will provide critical information that will help define NBAF’s “fit” within the Woodruff structure.

The “big idea” centers on the opportunity afforded by the convergence of a number of anniversaries in 2008—NBAF’s 20th anniversary, Young Audience’s 25th anniversary, the Woodruff’s 40th anniversary, and the 40th anniversary of the assassination of Dr. Martin Luther King, Jr. This project positions NBAF to honor its history, while creating and planning for its future.

The second track of the partnership development project is in keeping with the process originally envisioned. It investigates issues associated with NBAF as a stand-alone organization operating within the Woodruff construct. NBAF intends to continue to present its annual festival in the Woodruff facilities, which will only have a connection with the “big idea” in 2008. Therefore, the second track addresses issues relating to, but not limited to: values and ownership, identity, artistic quality, annual space use, as well as marketing and fundraising.

Rationale for two approaches

The “big idea” track has galvanized and excited the leadership of the Woodruff, its four divisions, and NBAF. It has created a good working environment, and it is the hope among many participants that the whole (working together as group) has the potential to be greater than the sum of its parts.

While this may prove to be true as a fundraising or marketing strategy centered on a project, NBAF does not believe that this strategy will necessarily bring the process to its intended goal of addressing the critical areas that produce a formal, long-term institutional relationship. The group has agreed, and the two tracks are being implemented simultaneously.

To better inform the overall partnership development process, NBAF designed an integrated and interactive project that included: facilitated discussions with executive board and staff leadership of NBAF, the Woodruff, and its divisions; research on the partnership efforts of other organizations in the field; and documentation of the facilitated NBAF/Woodruff sessions. Key points and possible areas for research were documented in each NBAF/Woodruff meeting. Learnings (successes and failures, challenges and opportunities) from research on other partnership efforts informed the NBAF/Woodruff dialogue and will be used in the future to shape the relationship with the Woodruff.

NBAF believes that the findings from the partnership development process and the research component, in particular, will benefit other organizations participating in the Exemplar Initiative and in the broader arts field. This report focuses on the research component of the partnership development process.

Methodology

NBAF engaged a consultant to conduct the research on long-term relationships in the arts and participate on its project team. In July 2006, during the NBAF annual festival period, the consultant met with the heads of each Woodruff division in an effort to better understand their relationship (challenges and opportunities) within the Woodruff construct and each division's past and current relationship with NBAF. This information helped to frame discussions in subsequent NBAF/Woodruff discussions, shape the two-track partnership development process, and inform research protocol.

The consultant reviewed reports, studies, and articles to glean best practices and to identify gaps in knowledge about partnership processes, reasons for success and failure, and possible new thinking about strategies. Critical issues and key points from these reports and documented notes from NBAF/Woodruff dialogue clarified and shaped research interview questions. (See Attachment A for reports and studies reviewed.)

Identification and selection of participating organizations

To identify potential organizational partnerships to study, the consultant spoke with several consultants and arts leaders, authors of relevant reports and studies, as well as representatives of organizations considered for research. (See Attachment B for a list of these individuals.)

Diverse organizations were considered, and a final group of ten organizational pairs already involved in a partnership were selected for the scan. The scan mix included partnerships between: presenting to presenting organizations, organizations of color to mainstream organizations, and small to large organizations. This mix included producing and presenting relationships, arts and non-arts organizations, and mainstream-to-mainstream pairings.

The consultant selected organizations to participate in the research component based on what specific knowledge and experience each could offer that would inform the development of NBAF's relationship with the Woodruff and that might offer new learnings for the field. Several Ford Exemplar Program organizations were considered early in the process, but were not selected because other groups appeared to be a better fit.

Each potential organization was sent an e-mail inquiry describing the NBAF/Woodruff project and requesting a brief conversation to determine its interest in participating in the process, its partnership experience, the appropriateness of its participation, and if it was available to participate in the scan, given the research timeline.

The organizations that were chosen through results of these brief conversations were then engaged in in-depth, onsite interviews, and, in some instances, telephone interviews with the executive directors of each organization. Leadership transition, common among many of the organizations, increased the number of individuals in the interview pool and extended the timeline for the research process. Interviews conducted with former executive or program leadership allowed for a more accurate picture of the history, impetus, and vision for organizational relationships. They also offered insight into the reason certain challenges exist now. Current programmatic, marketing, and fundraising staff were also interviewed where appropriate. Organizational materials were gathered on each organization, mostly through website content.

The selected organizations are a diverse group with annual operating budgets ranging from \$450,000 to \$32,000,000 and staff size from three to 400 full-time employees. Some organizations have been in existence for more than 200 years and others for ten years. Some relationships are relatively new—two years old, while others range from ten years to 38 years old. Newer relationships were included in the scan based on the intention of a long-term relationship.

Organizations Selected for the Research Project include¹:

Brooklyn Academy of Music & 65 | Arts
Brooklyn, New York

Bedford Stuyvesant Restoration Corporation & The Billie Holiday Theatre
Brooklyn, New York

Clarice Smith Performing Arts Center at Maryland
& performing arts academic units at the University of Maryland, College Park
College Park, Maryland

Danspace Project & St. Mark's Church in-the-Bowery
New York, New York

Detroit Institute of Arts & Mosaic Youth Theatre of Detroit
Detroit, Michigan

Detroit Symphony Orchestra & Arab Community Center for Economic and Social Services
Detroit, Michigan

GALA Hispanic Theatre & Washington Performing Arts Society
Washington, DC

Harlem Stage/Aaron Davis Hall, Inc. & The City College of New York
New York, New York

The Philadelphia Dance Company (Philadanco)
& The Kimmel Center for the Performing Arts
Philadelphia, PA

University Musical Society & Sphinx Organization
Ann Arbor, Michigan

¹ Initially, 12 organizational partnership pairs were chosen for the research project, but only ten actually participated, due to timeline issues. However, the partnerships of the Arab Community Center for Economic and Social Services (ACCESS) and the University Music Society, and the Detroit Symphony Orchestra and the Sphinx Organization are included mentioned in this report to provide additional input to the project's findings.

The divisions of the Woodruff Arts Center—the High Museum of Art, Atlanta Symphony Orchestra, Alliance Theatre, and Young Audiences—were also interviewed to better understand the formal terms between and their interactions with each other and the Woodruff, and the challenges, benefits, and services each provided.

The consultant attended a series of meeting between NBAF, the Woodruff, and its four divisions to identify possible topics for investigation in the research phase. The consultant provided NBAF with preliminary findings from interviews with participating organizations throughout the NBAF/Woodruff development process, and in March 2007 the consultant furnished NBAF board and executive staff leadership with a summary of findings regarding lessons learned from the research up to that point.

This research report provides a summary of findings that have been synthesized and analyzed, and presents them in aggregated form to compare and contrast key areas. All organizations are still engaged in the relationship identified in the report; however, there were indications that there might be some changes in the near future. To ensure openness in interviews, participants were assured that no comments would be attributable to specific individuals. However, all agreed to be listed as participating organizations. A number of organizations are identified in the report, but only when describing the range of reasons for establishing a relationship.

The Research Report

Introduction

As NBAF approaches 20 years of existence, it acknowledges the changes in the arts field and larger environment and considers the impact of this on its future. It is not alone. Like NBAF, more and more arts groups are investigating new ways to sustain themselves and their core programs, particularly in light of the economy, demographic changes, increase in the number of arts and other nonprofit organizations, audience decline, and changes in arts funding strategies by government agencies, corporations and foundations.

Five community foundations in Pittsburgh, for example, developed a “pooled fund” for six cultural district performing arts organizations to address some of these same issues. The fund is designed to create *cooperative* programs that advance the mission of each organization by increasing revenue, decreasing expenses, or improving customer experience. In California, The James Irvine Foundation supported research that examined the dramatic changes in the arts and cultural environment that are impacting the way in which arts groups conduct their business. Their report, *Critical Issues Facing the Arts in California: A Working Paper from the James Irvine Foundation*, published in September 2006, states that “the nonprofit arts and cultural sector is facing major, permanent, structural changes brought on by technological advances, globalization, and shifting consumer behavior.” The report focuses on five key issues—Access, Cultural Policy, Arts Education, Nonprofit Business Model, and the Next Generation of Artists and Arts Managers—that emerged as priorities for the future health and vitality of the cultural sector of California.

For many that participated in this study and for the National Black Arts Festival, a business model that embraces long-term organizational relationships or strategic alliances around programs, audience, space, and administrative resources are priorities and inevitable strategies to ensure their sustainability.

Summary of Findings

One key area is what is meant by *partnership*. There appears to be no consensus regarding terms and their usage. This issue is not unique to this study; it surfaces in other studies concerning short-term relationships. In Thomas Backer’s working paper², *Partnership as an Art Form: What Works and What Doesn’t in Nonprofit Arts Partnerships*, partnerships are defined as “more or less formal structures, some temporary and some permanent, which bring together a group of organizations in a community to implement a new program, to change something that already exists, or to address a specific problem or crisis. They involve the sharing of goals, activities, responsibilities, and resources.”

In this scan, one or both parties in many organizational pairings were reluctant to use the term *partnership* to define their relationship. The term seemed to infer a certain type of behavior or expectation, which they believed did not adequately describe their relationship. This was the case whether a relationship involved a single arrangement or multiple arrangements. In multiple arrangements, organizational leadership spoke in terms of collaborative programming or program partnerships, joint fundraising, and tenant/landlord relationships. A single relationship involving only space was often referred to as a good business relationship or deal.

In this report, the term *relationship* is used instead of *partnership* to describe the pairs of participating organizations. The term *partner* is sometimes used to describe one of the organizations in a pairing.

A review of a number of reports and studies on partnerships revealed few that focused on long-term relationships in the arts. These reports, however, provide useful information on the benefits and challenges of short-term partnerships. Benefits include enhanced program and audience participation; access to space and information; administrative, marketing, and fundraising services; increased visibility; generation of new financial resources; and enhanced knowledge about other cultures, work environments, and practices. They also describe the challenges of these partnerships, particularly between large and small organizations: resource differences; issues around identity, fundraising, and marketing; and the human and time resources required.

As might be expected, all of these same topics surfaced in the research study. However, the study viewed relationships through a slightly different lens—those existing over a longer period of time. In a few instances, relationships were only a few years old, but were entered into with the idea that they would exist for a longer period of time, not just as one-time projects.

One benefit of taking this long view is that new challenges and benefits are likely to surface. Alternatively, areas that appear to be beneficial or challenging may become otherwise over time. For example, written agreements—important when financial resources are involved and when an organization’s sustainability relies heavily on the relationship’s terms—seem to become more of an issue in longer-term relationships. The vision of one executive director does not ensure the same vision exists with his or her successor. The longevity of key staff can play an important role in refining and sustaining relationships. The ability of staff to learn from failure and success and to have the opportunity to make revisions can greatly improve and solidify relationships.

In long-term relationships, many organizations of color and small organizations are certainly more challenged in relationships than their larger or mainstream partners. However, over time, when all it’s all added up, the benefits for most small organizations and organizations of color

² Backer, Thomas E. *Partnership as an Art Form: What Works and What Doesn't in Nonprofit Arts Partnerships*. Encino, CA: Human Interaction Research Institute. 2002.

appear to greatly outweigh the challenges. There are several organizations of color and small organizations that have experienced fewer challenges than other similar organizations in the research study. The reasons that seem most apparent are high level, sophisticated, and experienced administrators and successful, high quality artistic programs recognized by their partners, the media, and funders.

In this research study, some large organizations that are financially strapped are sometimes more receptive to building partnerships that fill program gaps, utilize space, or generate additional income. Some of these same organizations are less likely to create partnerships and be supportive when they are in a healthier financial position. Other large organizations are consistent about their commitment regardless of financial circumstances. These organizations tend to value partnerships and collaborative relationships as a critical way of doing business and serving their diverse communities.

Some large mainstream organizations realize that they can no longer operate in isolation and be narrowly focused in their programming and audience efforts. These organizations believe that being the biggest requires that you set the standard and that collaboration is a key component of this standard.

Smaller arts organizations with fewer resources tend to be more nimble and quicker to respond than larger arts organizations. Larger organizations with more human and financial resources tend to be more structurally rigid. This can create stress for both partners in the implementation of projects and the operations of their organizations.

Some of the organizations of color studied have fairly large budgets and staffs. Their experiences in relationships tend to be more like their large mainstream counterparts than small organizations of color. For example, like their mainstream counterparts, several noted a key learning from their experience: It might be better to work with many organizations on short-term projects, instead of one in a long-term relationship. Two primary reasons for this are the need to serve a broader and more diverse community and to allow for their own institutional growth.

The five areas of focus found below offer more detail on these findings:

- Impetus for creating relationships
- Negotiation process
- Benefits and services
- Liabilities and challenges
- Reasons for success and lessons learned

Impetus for Creating Relationships

There were many reasons articulated for the creation of a relationship. Organizations came together driven by a specific need or multiple needs, sometimes with common or differing agendas. Some relationships were entered into with the intention of being long-term and others with a focus on a short-term project that evolved into a longer-term relationship. There are other relationships that are not short-term or have been in existence for many years, but there is no consensus between groups that the relationship should or should not continue. The following outlines some of the key reasons given for building relationships.

Timing can be the stimulus for developing a relationship. For example, a horrific event created the right moment for one organization to deepen its relationship with another. The impact of September 11 on the Arab-American population in Detroit created the fertile environment for a closer and longer-term relationship between the University Musical Society (UMS) in Ann Arbor MI, and the Arab Community Center for Economic and Social Services (ACCESS) in Dearborn, MI. The subsequent attack on Arab culture, post-September 11, shifted ACCESS's focus to one that realized culture was a bridge to building relationships and erasing stereotypes.

Lack of organizational capacity was another contributing factor for organizations coming together. The Sphinx Organization's leadership undertakes almost every aspect of its programming through partnerships with other organizations, allowing for more effective and efficient use of their resources. Sphinx is viewed as having one of the best education programs of its kind on classical music in the country. As a relatively young organization ten years ago, Sphinx had little experience or the staff capacity to build a school time audience for its program. The University Music Society (UMS), on the other hand, had a fully developed youth education program with a long history with local schools. It also had the administrative capacity and skill to handle the logistics of accessing and moving thousands of children to performances. Sphinx's Honors Concert is now an essential part of UMS's Youth Performance Series.

Service to a broader community was the mandate for a number of organizations. The Brooklyn Academy of Music (BAM) needed access to more diverse space for new theater productions by Peter Brook. 651Arts, now a leading presenter of work from the African Diaspora, was created in 1986 in response to New York City's government's desire to make BAM and the Majestic Theater (now called the Harvey Theater) more accessible to Brooklyn's local community and artists. Harlem Stage (formerly Aaron Davis Hall) was created in a similar manner when The City College of New York, in response to the concerns of major individual donors, sought to create a mechanism that would serve the local community and support Harlem-based artists, while serving the university's student population.

Access to quality, professional space inspired another relationship. The Kimmel Center for the Performing Arts in Philadelphia, Inc. began to take shape in 1996 when two projects came together: the Philadelphia Orchestra's ongoing plan to build a new home for itself and a plan of then-Mayor Edward G. Rendell to provide a much-needed venue for some of Philadelphia's prominent performing arts companies and for touring presentations. With the consent of the Orchestra, which had acquired a property at Broad and Spruce Streets, the two plans were merged under the supervision and management of a new organization, Kimmel Center, Inc. The Kimmel is now a complex that houses eight of Philadelphia's major performing arts organizations.

The inclusion of the Philadelphia Dance Company—Philadanco, the only organization of color in the mix—was based on the belief by Kimmel Center leadership that resident companies should reflect and embrace the diversity of Philadelphia, especially given the support provided by the City and other key local funders to build the complex.

Financial challenges associated with use of a city-owned outdoor park forced ACCESS to consider other venues for its fifteen-year-old *Festival of Colors*. ACCESS now co-presents this festival annually at the Max M. Fischer Music Center with the Detroit Symphony Orchestra (DSO). *Access to diverse high quality artistic presentations and equally diverse audiences* was the incentive for the DSO's agreement to the co-presentation relationship. Access to diverse audiences was also equally important to the Sphinx Organization, as well as Philadanco and ACCESS, in their decision to participate in a program and space-related relationships.

For several non-arts organizations, the establishment of long-term relationships with arts programs and organizations addressed their broader goal of *servicing community development objectives*. Bedford Stuyvesant Restoration Corporation (Restoration) was established in 1969 as the model for nonprofit community development corporations across the United States. Restoration serves Central Brooklyn—a predominantly low-income community of approximately 290,000 residents who are primarily African-American, Caribbean, Latino, and African. Restoration’s leadership views its arts and cultural programming as a critical part of its human development efforts and, ultimately, community development work. A prominent component built into Restoration’s institutional program is The Billie Holiday Theatre, a professional theater company that was one of the first black theater companies to produce a work on Broadway. In a similar fashion, St. Mark’s Church created space opportunities for the Danspace Project, which was consistent with its community service mission. This is also true of ACCESS’s holistic view of community health being inclusive of arts and culture.

Access to new funds is an incentive for relationship building. The Detroit Institute of Arts (DIA) was engaged in a \$500 million capital campaign. Given the difficulty in raising funds in a financially stressed economy, DIA did not include its 1,200-seat historic film theater in the campaign. Mosaic Youth Theater (Mosaic) needed a consistent space in which to hold its productions and to develop audiences. Mosaic leadership decided it was more efficient to be in a facility partnership than build new space. It worked with DIA to develop a plan to raise \$3.5 million to renovate the film theater in exchange for having a consistent schedule of dates annually.

Over the years, *foundation initiatives* paved the way for many current long-term relationships. This support was directed towards partnership building, project commissions, artist residency activities, and facility use. In some cases, these funds came from community foundations and in other cases from national initiatives. According to many interviewees, the Lila Wallace-Reader’s Digest Fund (LWRD) Arts Partners initiative figured prominently in seeding the ground for a number of relationships.

While some LWRD-supported projects may not have achieved some of their immediate desired outcomes, their resources permitted arts leadership from organizations of color to get in the game and hone skills to develop long-term relationships, albeit with a different set of organizations. It also encouraged a new standard for large institutions to engage in partnership planning.

The Negotiation Process

Many of the long-term relationships studied did not involve a formal process or plan from the onset; they evolved organically over time. Others started with written agreements crafted by individuals with expertise in contract negotiations. In some cases, the brokering of relationships evolved over time starting with program collaboration. In many cases, relationships already existed because of previous personal or professional interaction. Leadership took advantage of opportunities when they surfaced.

Some negotiations went through a fairly smooth process because trust had already been established. Others were more contentious and involved external professional expertise to navigate tricky terrain. Also, sometimes one organization was more interested in working together than the other. Partners had diverse priorities that were not always in alignment. Sometimes there were external incentives or conditions driving partnership.

In most instances, the relationship development process was facilitated between executive or program staff leadership. Some large organization/small organization relationships used lawyers to negotiate and develop agreements relating to space use. In one instance, the organizations involved had different views on the value of lawyers in the negotiation process. Both believed it slowed down the process and made it onerous. The smaller organization, however, believed it gave them the knowledge and expertise it didn't have and leveled the playing field. In three cases involving relationships between large and small groups, a consultant was engaged to broker the relationship and, eventually in two situations, then hired to run the smaller organization.

Several organizations developed advisory committees made up of board members and local political leaders to guide and inform their negotiation process. Several organizations used the development of strategic plans as a means of creating criteria to guide any future partnership.

Services and Benefits

It's no surprise that many of the same services provided and benefits realized in short-term relationships are also attained in long-term relationships: access to new sectors, key individuals, new board members, and new audiences; office space, professional performance facilities, and technical services; and higher level marketing, fundraising, financial management, and production management staff. However, when reviewing some of the benefits of sharing over time, another perspective is provided.

Income generation. Local funders tend to reward groups who create good will by working together. These are not funds that are used as a carrot to get groups to work together, but funds that come after a long period of usually successful collaboration. New fundraising by a small organization for renovation of a facility owned by a large institution encouraged individual donors to the latter to increase their amount of support. The inclusion of several new board members from communities of color meant access to new funds for new programming that reflected the culture of these communities, as well as an increase in general support for the larger mainstream organization.

Access to new funding sources is not unusual as a benefit in partnership efforts. However, it is unusual for smaller organizations or organizations of color to attract very large grants for programs, space renovation, capacity building, reserves, and endowment. An ongoing relationship with a larger organization positioned several small organizations or organizations of color for grant awards of several million dollars. In addition, access to significant funds for partnership building by a resource-poor small organization enhanced its profile and position within its community. This then allowed it to develop successful relationships with other organizations.

Consistent access to larger theater facilities. This benefit has increased earned revenue significantly for several small organizations of color that now are able to present large-scale work or to rent to outside users. One organization of color generates almost fifteen percent of its annual budget from facility rentals. While this level of income may not be unusual when an organization owns its space, it is not necessarily the norm when an organization has a space agreement with another arts organization. Another small organization has paid for riskier contemporary programs with income generated by presenting more popular events in a larger venue.

Enhanced programming. In addition to increasing culturally diverse programming, partnering organizations benefit from co-presentations, shared curatorial roles, and participation in

adjudication processes and professional artistic development. This generally occurs when there is a shared aesthetic or concern for the broader community.

Long-term relationships have an impact on the institutional program mix and annual programming of several major institutions and organizations of color. One large mainstream organization in a long-term relationship with several organizations of color re-ordered its institutional program priorities by placing less emphasis on main stage activities and elevating the role of community-related and contextualization activities, learnings gleaned from its partner organizations about their approaches and relationships to their communities.

Close, ongoing interactions between leaders of several organizations—including traveling together to see work—have helped build knowledge about other artistic and cultural forms and artists. This has changed significantly the mix of work on the annual program seasons of two large mainstream institutions. For several smaller organizations of color, relationships with a large organization have led to a number of large-scale multi-year residencies, co-commissions, and co-presentations.

Space access for several organizations of color has had a trickle-down effect—the development of new projects, some collaborative, that opened up professional facilities to more community arts and non-arts organizations. These projects were realized through rental programs, support for self-presentations, and inclusion in the annual seasons of both partner organizations.

Challenges

Long-term connections between arts organizations and between arts and non-arts organizations can enhance sustainability efforts. However, there are a number of areas that organizations should consider more carefully.

Institutional program change. For years, funding initiatives have encouraged mainstream organizations to present artists of color and culturally diverse programs. As mentioned previously, many of these organizations now see the value of this work programmatically and financially, as well as a means of connecting more closely with diverse segments of their community. In some instances, this behavioral change is due to artistic or executive leadership change. In other cases, it's informed by program partnership activities with organizations of color, and for some "it just makes good business sense."

With this transformation, a few large mainstream organizations are now re-thinking their strategies regarding program partnerships with just one organization. Perhaps, for them, short-term partnerships with many organizations may be better than long term as it allows for even more diverse programming, healthy competition, and greater service to its local community.

Several key questions are prompted by this learning. How will these views of potential relationships impact organizations of color with limited resources that are perceived as doing the same artistic work as larger mainstream organizations? Are they, in fact, doing the same work or is their work quite different in the way they engage with artists and their community? Many organizations of color came into existence to serve artists, administrators, technicians, designers, and communities of color. They provided forums for other artistic visions to be realized; for emerging artists to be nurtured and presented in professional settings; and for the training and development of administrators, technicians, and designers. For many, the issues relating to equity still exist for the most part, as highlighted in the debate between August Wilson and Robert

Brustein regarding black theater fueled by August Wilson’s keynote address at Theatre Communications Group’s 1997 annual conference.³

Leadership transition. A change in executive or key program leadership often impacts the relationship between organizations. New leadership often brings a different set of values, program vision, and work style. In most cases for the relationships examined in this study, leadership change did not have a positive effect on relationships, although it did not end them. There are, however, a few situations where executive leadership change opened up new opportunities. In two instances, one a relationship between a non-arts organization and a large mainstream institution, a change in leadership brought a high level of commitment to the arts and to diversity. In some instances, strong program leadership buffered the impact of executive leadership change in the short-term. Over time, however, constant staff turnover on the executive level and in key positions (marketing and fundraising) created a sense of instability, inconsistency, and concern by both large and small organizations.

Written agreements. Written agreements tend to exist when an exchange of funds or performance space is the focal point, including co-presentations. Most participating organizations do not have written agreements that capture all aspects of their relationship. With a few exceptions, organizations have verbal agreements for program-based collaborations. In many of these cases, follow-up meeting memos have been developed that outline the discussion and decisions agreed upon. This helps to avoid confusion around interpretation or recollection.

Written agreements can be particularly important when there is the potential for leadership change. One organization anticipated leadership change and attempted to develop agreements that would outlast the executive leadership of their partner organization. However, it quickly discovered that the exiting leadership was reluctant to tie the hands of a successor by imposing a long-term contractual agreement. There are also no guarantees that written agreements cannot be undermined when leaders change.

There was a range of attitudes regarding written agreements.

Since it works seamlessly with its partner organization, it has not occurred to an organization to develop a document that captured the agreed upon terms of its relationship.

Partnering organizations prefer to work without a written agreement, as a loose, informal approach has allowed them more flexibility.

An organization has acknowledged the necessity for a formal written document to codify its relationship, but has chosen to ignore this for fear it might ultimately be too restrictive.

An organization involved in a relationship has followed a cultural belief—the less that is written down, the more successful a relationship can be.

Some smaller organizations with fewer resources had less experience and expertise to negotiate equitable agreements and, therefore, didn’t encourage them.

There were others, however, that felt differently. One small organization of color prefers to renew agreements annually to assess the impact of environmental, artistic, and programmatic

³ Grimes, William. “On Cultural Power: The August Wilson/Robert Brustein Discussion” [Electronic version], New York: The New York Times (January 29, 1997). Retrieved from <http://query.nytimes.com/gst/fullpage.html?res=9F00E7D81E3AF93AA15752C0A961958260>

changes. This agreement, however, includes language that assumes a long-term relationship. Three pairs of organizations had space agreements that were for five, ten, and twenty-five years, respectively.

Environmental change. Changes in the local economy, the impact of major national or local events, and the social/racial construct in a community can seriously affect an organization and subsequently its relationship with another organization.

Culture/work style. Different organizational cultures and work styles may unintentionally impede a process of relationship building. Organizations on both sides of a relationship acknowledged that the fundraising and marketing departments of larger organizations have fairly rigid structures focused on achieving financial goals for their primary organization, which is generally linked to the staff person's performance appraisal. They often feel put upon unless executive leadership involves them in the early stages of relationship building and modifies their measures of success to consider the impact of the partnership relationship.

Purchasing services from another organization may be attractive because of potentially reduced costs. However, the size of an organization does not necessarily mean its staff has the appropriate expertise and knowledge or is structured to work on behalf of smaller organizations or organizations of color.

Reasons for success

There does not appear to be any one reason or formula for success in relationships. As pointed out in several reports, too often success is measured in financial terms—funds raised or resources brought to the table. Organizations that have or had what they consider successful relationships point to the following factors.

Benefit to community. The most successful partnerships appear to be those that place significant importance on the value of their relationship to the larger community, artists, and the field—not just their own organizations. It appears that when disagreements occurred, amicable solutions came about when *both* organizations focused on the benefit to their community.

Community involvement. The deep engagement and involvement of key non-arts community leaders help to sustain relationships between partners and generate new funds for the partnership or programs. The review and input in contractual negotiations by non-arts community leaders, political leaders, and representatives from funding agencies can provide much-needed weight and oversight to ensure smaller organizations obtain fair and beneficial terms. Many successful relationships have community donors and leaders on their boards, advisory committees, and in policy-making positions.

Institutional commitment. Shared board members and criteria for partnerships that are built into strategic plans often create the environment for stable relationships. Vertical buy-in—for instance, staff involvement beyond the executive level—is also critical to successful relationships.

Continuity/longevity of key staff. Over time, executive leadership and key staff with long tenures have seen both success and failure. This allows them to learn from mistakes and make changes to improve a relationship. Long-term relationships between partnering organizations allow for leadership and staff to also learn about each other without the pressure of delivering a short-term product. A fluid and flexible work environment allows for more creativity and innovation between organizations.

Acknowledgement of equity issues. Heavily resourced organizations do not measure the value of smaller organizations or organizations of color based on financial contributions. They value their diverse program ideas and different approaches to community engagement.

Artistic equality. Each organization views the other’s artistic product as high quality and sees it enhancing their programmatic mix.

Multiyear space agreements. These agreements protect organizations of color and small organizations from institutional and leadership change at larger partner organizations. It also enables them to undertake advance program planning, marketing, and fundraising. In regards to fundraising, organizations that do not own a facility, but want to undertake capital improvements in facilities they rent, have found it difficult to raise funds without at least a ten-year agreement.

The downside to space leases lasting ten or more years—as noted by large, small, and mainstream organizations, and organizations of color—is that it impedes or can potentially limit organizational growth. Several large organizations point out that environmental change has had tremendous impact on their communities, which also affects how they do business. Long-term leases do not give them the flexibility to change programming or develop better terms in union agreements. Smaller organizations have been interested in term options that allow for growth and to take advantage of opportunities.

Lessons learned

Organizations involved in the study acknowledged that, over time, many mistakes were made on both sides of the table. From both successes and failures, organizations identified what they believe are key lessons learned.

Smaller organizations and organizations of color. These organizations must bring some tangible value—audience, program, artistic reputation, funds, or key contacts—to have a real relationship with a large mainstream partner, otherwise the environment will be a patronizing one. Being an equal partner makes a huge difference in a relationship of mutual benefit. However, there is general agreement that milestones in relationships cannot be viewed as just financial and that organizations need to find better ways to articulate the value of these relationships.

Leadership. Individuals in leadership positions—particularly large mainstream organizations—who are generous spirits and humble are more likely to develop a trusting relationship with organizations of color and smaller organizations.

Leadership transition. A formal process of transitioning from one key executive or program leader to the next should be developed to ensure the spirit and philosophical ideas of a relationship are conveyed.

Clearly defined goals and language. Participating parties need to clearly understand each other’s agenda and agree about common goals. Consistent usage of agreed upon terms and their definition supports clarity and avoids confusion.

Written agreements. Organizations with multiple arrangements between them might consider separate written agreements for space, for fundraising, and for program/marketing partnerships. This allows organizations to move forward in areas in which they can agree and take time to work out agreements that are more difficult.

Time to build trust and the relationship. Partnering organizations need to regularly schedule time to honestly assess their relationship and clarify its primary goals and objectives. By participating together in external, community activities, partners create opportunities to work together in a different context and learn more about each other personally and professionally.

An environment for multiple visions to be realized and co-exist. The co-existence of multiple artistic visions is a consideration in at least three relationships involving large and small organizations and mainstream organizations and organizations of color. The most successful relationships are those where there is mutual respect for each organization’s curatorial vision and artistic work. In these instances, organizations also co-present programs or share curatorial roles.

A learning environment for all. The “lieutenants” in an organization need to buy into and own the project and process to ensure long-term success. If key staff is not fully informed of the value of these relationships, they inevitably see them as burdensome.

Fundraising. Fundraising is considered the most difficult part of relationships. Most organizations agree that a project and a process for developing a relationship come first, *then* attention is paid to fundraising. One organization approached a relationship with the assumption that there may not be funding and developed the relationship with existing resources. A lack of parity in salaries, production, and program costs generally makes it difficult to agree on the division of funds. Strained financial conditions on the part of one organization can create an opportunity for another organization. It can also create tension and change the dynamics of a relationship.

Fundraising guidelines, including but not limited to the following, should be identified and clearly articulated in a written agreement.

Division of money and labor should be determined at the onset.

Funds raised should be allocated to direct program expenses, not administrative costs.

Never fundraise without the knowledge of your partner.

Anticipate raising less and develop alternate plans and cut-off points (date to stop fundraising).

Use of intermediaries. Intermediaries and brokers should not serve as spokespeople or in place of an organization’s leadership. They appear to be most useful when facilitating the initial stages of a relationship. Partner organizations can “introduce” their respective audiences to each other. However, after the introductory period, strategies should be implemented that permit each organization direct access to the other’s audience and staff.

Changes in the field. Organizations, particularly mainstream and large organizations, can no longer operate as they did in the past—focused only on their art. Consideration and involvement of more segments of their larger community will be critical to their survival.

Conclusion

Research study findings reveal that there is no one formula for a successful long-term relationship, as there are too many variables. However, NBAF and other organizations should take into consideration a number of key areas identified in the report, particularly when first entering a relationship.

For small organizations and organizations of color, like the National Black Arts Festival, there will always be challenges when in a relationship with larger, mainstream organizations. Some of these challenges have been experienced by NBAF in its partnership with the Woodruff Arts Center—each of its four divisions has a unique vision, culture, and work style. Research shows that in the long term, benefits and services can outweigh the issues that arise in relationships. Clarity upfront concerning goals, roles, responsibilities, and the terms of an agreement—along with an honest assessment of each organization’s strengths and challenges—will help to pave a smoother road.

Is a long-term relationship with the Woodruff and its divisions a viable sustainability strategy for the National Black Arts Festival? The findings of this research study, informed by a series of meetings with NBAF and The Woodruff suggest it may be, particularly concerning space and program collaborations. A long-term space relationship for annual festival activities will provide the appropriate level of professional facilities NBAF requires for the presentation of high quality work and to better serve current and new audiences. Program collaborations offer access to more high quality activities. Both space and program collaborations have the potential to positively increase NBAF’s access to human and financial resources.

Research findings point to a larger question for organizations of color, such as NBAF, which has more to do with survival, perhaps, than sustainability. As mainstream organizations become more diverse in their programming, how will this impact organizations of color? Will the need for these organizations diminish, as some have suggested?

The need now may be to *clarify* and *articulate* the role of mainstream organizations, organizations of color, and large and small organizations in the larger arts ecology and in the communities they serve. With this clarification, consideration might also be given to developing new nomenclature to describe these organizations—classification that more appropriately speaks to their role.

ATTACHMENT A: REPORTS AND STUDIES REVIEWED

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ATTACHMENT B: SOURCES USED TO IDENTIFY POTENTIAL ORGANIZATIONS

Anne Dennin	Executive Director, Performance Space 122
Nancy M. Devine	Director of Communities, The Wallace Foundation
Moy Eng	Program Director, Performing Arts Program, The William and Flora Hewlett Foundation
Olga Garay	Executive Director, Los Angeles Department of Cultural Affairs. Former Program Director for the Arts, Doris Duke Charitable Foundation
Sandra Gibson	President & CEO, Association of Performing Arts Presenters
Laura Greer	Vice President of Programming, Apollo Theater Foundation, Inc.
Maurine Knighton	Senior Vice President for Program and Non-Profit Investment, Upper Manhattan Empowerment Zone
Cynthia Mayeda	Deputy Director for Institutional Advancement, Brooklyn Museum
Francie Ostrower	Sociologist and Senior Research Associate, Urban Institute Center
Georgiana Pickett	Executive Director, 651 Arts
Oliver Ragsdale, Jr.	President, The Arts League of Michigan
Janet Sarbaugh	Senior Program Director, Arts & Culture Program, The Heinz Endowments
Holly Sidford	Principal, AEA Consulting
Lawrence J. Simpson	Senior Vice President for Academic Affairs, Berklee College of Music
Andrea Snyder	Executive Director, Dance/USA
Gerald D. Yoshitomi	Independent Cultural Facilitator