

Performing Arts Program Strategic Framework 2020



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INTRODUCTION

The arts inspire, challenge, and unsettle us. They instill joy and wonder, and are a powerful means for individuals and whole communities to understand and express themselves. Since its founding in 1966, the Hewlett Foundation has been an unwavering supporter of performing arts in the Bay Area, precisely because Bill and Flora Hewlett understood the arts' essential role in helping individuals and communities thrive.

To help ensure the Hewlett Foundation's commitment to the performing arts in the Bay Area, the Performing Arts Program engaged in a "strategy refresh" in 2019.¹ With support from the foundation's board, the refresh process provided a way for the Performing Arts Program staff to evaluate the Program's recent work; take a fresh look at the major developments in the region and the arts sector; and apply these lessons to a set of revised grantmaking strategies, which will guide its funding for the next five years.

Since its last strategy refresh in 2012, Program staff learned a great deal about the outcomes of our work, the rapidly changing regional and arts landscape, and how our grantmaking strategies need to evolve to account for those changes. This document describes both what we learned and how we are evolving our strategies in response. Critically, it is important to note what is not changing: our steadfast commitment, now in its sixth decade, to supporting the arts in the region the Hewlett Foundation calls home. However, as has been the case many times in the past, changes in the Bay Area's arts sector require the Program must change as well, to ensure the foundation remains positioned to realize its long-term commitment to the performing arts. In our new grantmaking strategy, we articulate this commitment as *supporting meaningful artistic experiences for the people of the San Francisco Bay Area*.

Change, for us, begins by acknowledging that the foundation's focus on sustaining a group of exemplary arts organizations — roughly 10% of all arts organizations in the Bay Area — has meant we have been supporting a relatively narrow range of artistic creation and forms of participation. While we are proud of the work we have funded under past strategies, we believe we need to invest more ambitiously and more creatively in the wider range of artistic and cultural practices that give the Bay Area its unique character. We also believe this is an important time to cultivate stronger leadership from and on behalf of the arts. And at the same, we need to find new and better ways to call attention to and foster the powerful role arts play

¹ Strategy refreshes are a routine foundation practice. Each program is required to undertake a strategy refresh roughly every five years to examine the degree to which the foundation is achieving its long-term goals.

in the lives of individuals and communities. To achieve these goals, the Performing Arts Program is evolving its grantmaking by putting the expectations and needs of Bay Area communities, artists, and youth at the center of its work. These changes are necessary to advance the current relevance of, and foster a better future for, arts and culture in the Bay Area.

Change is essential, but not to be taken lightly: Each dollar we grant for something new means one less dollar for organizations we have supported for many years. Yet, the Bay Area's dynamic and inimitable artistic community is challenged by physical and cultural dislocation, rising inequality, and changes in how people want to experience the arts, and we must respond to these shifts. We know the arts help people understand themselves and their place in the world, and help communities build connections across the differences that often divide them. Revisions to our grantmaking strategies ensure we continue to support performing arts that reflect the changing landscape, and are meaningful to people and communities throughout the San Francisco Bay Area.

CHANGES IN THE BAY AREA AND THE ARTS SECTOR

The Bay Area has some of the nation's most diverse and vibrant artistic communities. It is home to renowned grassroots organizations, classical arts institutions, avant-garde artists, countercultural movements, and dynamic cultural communities that make an outsized contribution to the region's remarkable character. Yet in the seven years since the Performing Arts Program last refreshed its strategy, a confluence of national trends and regional pressures has reordered cultural life in the Bay Area. Many of these trends are not new, but their intensity and velocity have increased noticeably, raising real concern for the future of the region's arts and culture sector. Our research highlighted five key trends, described below along with some perspectives about the foundation's relationship to these trends.²

Demographic and Economic Change

The Bay Area, like much of California, has undergone tremendous demographic change in the past 20 years. In 2000, California's population diversified to the point that no racial or ethnic group comprised a numerical majority

VALUES

The strategy refresh process led to the development of four values for the Performing Arts Program, which expand on and emphasize aspects of the Hewlett Foundation's mission and [guiding principles](#). The way the Program implements its 2020 strategies will be guided by these values.

The Expansive Power of the Arts

The joy, exploration, and wonder of the arts contribute richly to the making of a whole person and a meaningful society. They expand our hearts and minds, helping bridge our differences and surface our commonalities. The arts are essential for both individuals and communities to thrive.

Community Self-Determination

Art is a powerful vehicle for community self-determination. We support the right of every community to safeguard, express, and develop its artistic and cultural heritage, as well as imagine and have agency over its future. We believe a constellation of thriving and interconnected communities contribute to a vibrant region.

Equity and Justice

We intentionally invest in the ability of people and communities to express themselves creatively and participate in the cultural life of their choice. At the same time, we understand that the history of the United States, and our own region, has created inequities in wealth and power that reflect or reinforce cultural hierarchies and exclusion. We make a dedicated effort to work against these inequities by being as generous and strategic with our resources and time as possible.

Leadership

We strive to exercise our leadership thoughtfully, for the benefit of the people and communities we serve. This means continuously learning by listening and sharing what we know. Thoughtful leadership means, at times, stepping up to take a stand for the things we believe in. It also means stepping back to make space for those who have historically or are currently absent from leading and shaping the arts sector.

² An appendix to this document describes the strategy refresh process, including the research that informed the revised grantmaking strategies.

of the population. This trend will steadily continue: in the 11 counties the Program serves, the proportion of people of color is on track to grow from 57% today to 61% by 2040. A “graying” Bay Area is the other major demographic trend, with the proportion of people 65 years and older — 15% of the total Bay Area population today — expected to nearly double by 2040, to 24%.

The Bay Area is also one of the nation’s most economically inequitable regions. As an example, the median household income in Piedmont, a small city in Alameda County, is more than 17 times that of West Oakland, a neighborhood just three miles away. Economic inequity has contributed to regional “re-segregation,” as lower-income residents (who are also more likely to be Black or Latinx) move to the Bay Area’s geographic peripheries, where housing is more affordable, and the kind of benchmark arts opportunities the Program has traditionally supported are fewer.³

Listening circle participants in Antioch, pushed out of Oakland by the cost of housing, now spend hours in the car so they and their families can access cultural facilities. One parent, who practices West African dance, lamented the dearth of such facilities in Antioch.

These demographic and economic trends significantly influence who lives in the Bay Area and where, as well as what kinds of arts experience are of interest to them. Furthermore, the built arts infrastructure is increasingly misaligned with where and how people want to engage with the arts. Similar disparities are evident in public school-based arts education.⁴ Yet the vast majority of philanthropic arts funding continues to flow to established arts institutions, while many artists and culturally vibrant communities receive little or no support.⁵

Displacement

Skyrocketing real estate costs have fueled the displacement of artists, arts and culture organizations, and whole communities throughout the Bay Area. The cost of rehearsal and performance space, not to mention housing, has been rising continuously, and arts organizations find it increasingly difficult to manage staff turnover and limited hiring pools due to the high cost of living. Increasingly, organizations find themselves located far away from the communities they were founded to serve.

To date, the Hewlett Foundation has sought to mitigate these challenges through responsive grantmaking for arts space stabilization, capital grants for select organizations, and technical assistance related to real estate and business planning. However, the scope, scale, and relentlessness of the displacement demands a more systematic approach that considers the desires of communities, as well as the physical, economic, and cultural dimensions of displacement.

³ “Benchmark” arts activities include jazz, classical music, opera, musical and non-musical plays, and ballet performances, and have been tracked by the National Endowment for the Arts since 1982. See the “Participation” section (p. 4) for more detail.

⁴ Fewer than 42% of the Bay Area’s middle and high school public school students receive any form of arts education, and only 21% have access to the four arts disciplines required by state law. Participation rates are far lower for students in rural regions (17%), from low-income communities (32-36%), and in schools where the majority of students are African American (32%). Source: “San Francisco Bay Area Executive Summary Report,” Arts Education Data Project, December 2018, <https://hewlett.org/wp-content/uploads/2019/02/Hewlett-Regional-Data-Project-Summary-Report-2018-Final-1.pdf>.

⁵ For example, rural communities constitute approximately 20% of the population but receive less than 2% of foundation arts funding. Source: “Not Just Money: Equity Issues in Cultural Philanthropy,” Helicon Collaborative, July 2017, https://heliconcollab.net/wp-content/uploads/2017/08/NotJustMoney_Full_Report_July2017.pdf.

In 1990, Latinxs accounted for 60% of the population in San Francisco’s Mission District. As of 2013, this figure dropped to 43%, and is projected to dip to 31% by 2025. Organizations constituted by and serving Latinxs, such as Mission Cultural Center for Latino Arts, La Pocha Nostra, and Galería de la Raza, face difficult choices about their future as their communities move to Santa Rosa, Salinas, Sacramento, and beyond.

Changing Business Models

Art and culture are increasingly supported and sustained outside nonprofit arts organizations, which our current grantmaking is barely addressing. A huge variety of artistic and cultural activities are taking place in homes, churches, businesses, libraries, pop-up venues, outdoor festivals, and community centers. Such activities are enabled through a range of business models and structures, of which the traditional nonprofit is only one.⁶ Due in large part to the accessibility of online fundraising and promotion tools, artists can forgo forming or working with a nonprofit arts organization to disseminate their work, generate an audience, and gain legitimacy and revenue.

The foundation’s nearly exclusive focus on larger, established nonprofit performing arts organizations is not aligned with how or where much of the sector’s innovation and vitality are increasingly found.⁷ A more dynamic strategy will support artists who are working adjacent to or outside the nonprofit arts infrastructure, as well as smaller, newer, and, when appropriate, social and commercial enterprises.

Participation

Decades of studies on arts participation reveal two clear trends. First, *attendance* for “benchmark” arts events — events that focus on passive observation at formal institutions — continues to decline, a trend that shows no signs of abating.⁸ Plus, the demographic makeup of these audiences has not kept pace with changes in the larger population. Audiences for benchmark arts organizations are, relative to the general population: older (45 years and older); more racially/ethnically homogenous (predominately non-Hispanic white); more highly educated; and more affluent (the greater the income and education level, the more likely a person is to attend a benchmark event). Representative sampling of the audiences of Performing Arts Program grantees, conducted from 2012 to 2015, is consistent with these data.⁹

Studies also show a more positive trend: *Participation* in arts activities — taking a class; creating, practicing, or performing; or engaging with art via electronic media — is increasing. Likewise, the demographic makeup of those participating, by age, race/ethnicity, and income levels, is considerably more heterogenous when looking at the many art forms and ways people engage with art.

⁶ Other models include fiscal sponsors; hybrid business models; informal enterprises; and nonprofits where back-office services and other functions, including artistic direction, are shared. As one example, a 2018 study found that 11.6% of grassroots arts organizations in Oakland use a social enterprise model, such as cafés and clothing stores, to provide no- or low-cost arts programming. Source: Anh Thang Dao-Shah and Kate Faust, “Mapping Small Arts & Culture Organizations of Color in Oakland,” 2018, http://mapartscultureoakland.org/wp-content/uploads/Mapping_Oakland_061918.pdf.

⁷ When compared to the DataArts dataset for the 11 counties served by the Performing Arts Program, organizations that received support from the program are larger and older. Organizations with budgets of \$2.5 million or more represent 12% of the DataArts dataset and 25% of the Program’s grantees. Organizations established in the 2000s and 2010s represent 45% of the DataArts dataset and just 11% of the Program’s grantees.

⁸ “A Decade of Arts Engagement: Findings From the Survey of Public Participation in the Arts, 2002–2012,” National Endowment for the Arts, January 2015, <https://www.arts.gov/sites/default/files/2012-sppa-feb2015.pdf>.

⁹ Rebecca Ratzkin, Alan Brown, Sheena Johnson, “Building Capacity for Audience Research,” January 2016, https://hewlett.org/wp-content/uploads/2016/08/Building%20Capacity%20for%20Audience%20Research_2016.pdf.

The Performing Arts Program has predominantly supported established arts organizations that provide benchmark arts opportunities, reaching an increasingly limited subset of arts participants, and missing important opportunities to support more people’s meaningful engagement in artistic and cultural activities.

Funding

Philanthropic funding for the arts has declined steadily over the past two decades. A 2018 review of 20 years of arts funding revealed that “the arts, as they are traditionally perceived” — that is, benchmark fine arts — “represent a diminishing priority for foundation and corporate donors.” The report attributes this decline in funding to the challenge of making a case for the arts “in the face of pressure to address mounting human service and social service needs.”¹⁰

The Bay Area is no exception. The biggest change here occurred in 2016, when the James Irvine Foundation announced the conclusion of its arts program, followed soon after by reductions in arts funding by several other foundations. Making matters worse, neither public funding nor giving by individuals has kept pace with inflation.¹¹ These trends further strain a sector that has long suffered from undercapitalization and heavy reliance on its often-underpaid workforce.

Where other funders may see a disconnect between the highest profile parts of the arts system and community need, we see an opportunity: a chance to support art precisely because of its power to address human and social needs in the ways only art can. A more effective strategy would help demonstrate how the arts uniquely address our human need for individual and collective understanding, expression, and imagination, and are a worthy philanthropic investment.

KEY LESSONS: 2012-2019

The research described above makes clear that the Program’s approaches must evolve if we are to help ensure the Bay Area arts sector remains relevant today, and is well-prepared for the future.

Widen Our Lens

The changing landscape affects *who* is creating and experiencing art and culture, *how* art and culture is being generated and consumed, and *where* art and culture is happening. Our work must adapt to these changes, engaging the more expansive ways in which art is being created, consumed, and practiced. Widening our lens is an important opportunity for the foundation to embrace and support a more pluralistic understanding of artistic and cultural practice. Art is more than a product, presented at elite institutions, to be consumed by a narrow band of the population. It is a critical tool for individuals and whole communities to understand and express themselves, and an important device to preserve, shape, and grow culture.

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¹⁰ Steven Lawrence, “Arts Funding at Twenty-Five,” *GIA Reader*, Volume 29, No. 1 (Winter 2018) <https://www.giarts.org/sites/default/files/29-1-arts-funding-at-twenty-five.pdf>. and Holly Sidford, Marcy Hinand Cady, “Arts Funders and the Recession: A Year Later,” *GIA Reader*, Volume 21, No. 3 (Fall 2010), <https://www.giarts.org/article/arts-funders-and-recession-year-later>.

¹¹ An exception to this trend is in San Francisco, where the passage of Prop E is bringing \$9 million in new funding in 2019.

Redefine What It Means to Sustain an Arts Ecosystem

The Performing Arts Program has long described its goal in terms of sustaining the Bay Area’s arts “ecosystem,” borrowing an analogy from the natural sciences to explain our concern for both the overall system that creates and supports art in the Bay Area, as well as the way its constituent parts serve a wide range of needs. We have sought to achieve this goal by providing long-term grants to nonprofit performing arts organizations that represent exemplars of particular types of organizations.¹² Looking at what has happened in the region, we see that sustaining these organizations is not the same as sustaining an ecosystem. As one interviewee put it, “Hewlett is supporting professional arts organizations, not healthy arts ecologies.”

The changing landscape might not matter if the Program’s budget was enough to support a vastly greater number of artists, organizations, and initiatives. But given the breadth and depth of the Bay Area arts community, we cannot possibly reach, let alone sustain, the region’s arts ecosystem that way.

Continuing to think about our work in ecosystem terms makes sense: Like any thriving system, a thriving arts community is a system of interdependent parts that embody and serve many needs. To sustain such a system, however, we must choose our interventions carefully to ensure an appropriate distribution and balance, recognizing that opportunities to create and participate in the arts are unevenly available to individuals and communities. We must modify our outlook to ensure, first, that a diverse and eclectic array of art forms continues to thrive in the Bay Area, and, second, that it does so in ways that reflect the priorities of communities around the region and help knit them together. Modifying our understanding of what it means to sustain an ecosystem will help us determine which parts of the Bay Area arts community need the most investment and represent the best opportunities to advance the collective health of the sector.

Prioritize the Role of Arts in and for Communities

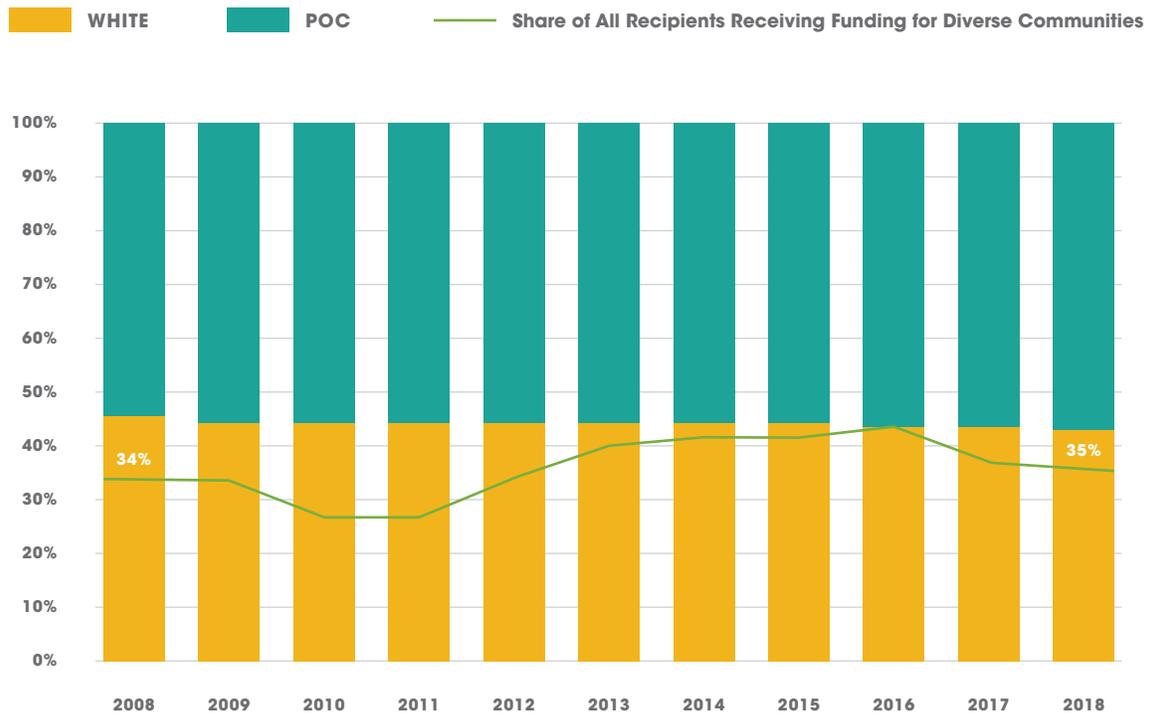
The Program’s strategy, adopted in 2012, emphasized the need to ensure “continuity and innovation” in the performing arts, and in doing so unintentionally privileged a narrow set of arts organizations. This has skewed both the Bay Area arts sector and our funding away from important sources of artistic and cultural vibrancy and exacerbated a disconnection to the demographic diversity of the Bay Area. Despite an explicit effort, under the 2012 strategy, to seek out organizations that would diversify the Program’s portfolio, our grantmaking remained remarkably unaffected. For example, the 45% of grants received by San Francisco organizations in 2008 barely decreased to 44% in 2017. Likewise, the 34% of grants in 2008 to “California diverse” organizations (organizations rooted in and reflective of historically under-resourced communities) barely increased to 35% in 2017.

We believe the Performing Arts Program can better ensure the relevance, responsiveness, and resilience of the sector by adding a community lens to our work: shifting our focus from treating support for individual grantee organizations as the unit of analysis in our grantmaking, to viewing that funding as a way to reach communities, including communities of artists and youth. This approach will enable the Program to more readily understand and fund work that is relevant to the communities that contribute to a culturally vibrant region.

Grants to organizations will still be the primary mechanism through which we achieve our goals. However, we will no longer view organizations as an end in themselves, but rather as a means for bringing artistic and cultural vibrancy to the communities those organizations serve.

¹² Today, the Program supports roughly 240 such organizations within the region, a sub-region, or field.

**POPULATION PROJECTIONS — 2008 TO 2018
(AGGREGATE 11 COUNTY BAY AREA)**



UPDATED GOALS AND STRATEGIES

These lessons, together with the foundation’s long-standing conviction that participation in the arts is essential for both individuals and communities to flourish, informed the development of a revised set of goals and strategies for the Performing Arts Program, described below. This will guide our grantmaking for the next five years, from 2020 to 2024.

GOAL

Bay Area communities honor and support their own and each other’s artistic and cultural vibrancy, and the power of the arts and artists to advance individual self-expression and collective self-determination.

This revision to the Performing Arts Program’s overarching goal recognizes the critical role the arts can and must play in the lives of individuals and whole communities. The goal elevates the symbiotic relationship between artistic vibrancy and the Bay Area’s cultural diversity. It affirms the importance of individuals and communities to determine and engage in artistic and cultural practices that represent and reflect their own interests and aspirations, as well as appreciate others’ artistic and cultural practices.

Strategies

The Performing Arts Program will pursue three interrelated strategies and two sector-wide efforts to make progress toward its overarching goal. These strategies will structure and guide both our grantmaking and our work beyond our grant dollars, such as commissioning research or organizing convenings.

COMMUNITIES

GOAL *Bay Area communities discover, develop, and experience artistic and cultural practices that provide meaning, inspiration, and joy.*

Our Communities strategy advances the artistic and cultural vibrancy of the Bay Area by supporting a broad range of performing art forms and practices that are relevant to and reflective of people living throughout the region. This strategy recognizes that artistic and cultural vibrancy cannot be separated from the Bay Area’s ever-evolving demographic diversity, nor from the economic realities of increasing inequality, which affect who, how, and where the performing arts are being created, experienced, and practiced. To ensure that people across the region have opportunities to engage with art that is meaningful to them, the Program focuses on who organizations reach, and how their work impacts individuals and communities. The Program employs a community-focused lens in choosing where and with whom to invest, improving our ability to advance performing arts practices broadly and equitably, and more easily recognize meaningful arts practices supported by non-arts, for-profit, or informal groups or entities.

We define communities expansively to include groups that are identity, affinity, artistically, and geographically based, which is how most organizations that work in dialogue with the people they aim to reach define themselves and describe who they reach. The Program’s use of “community” is not intended to reduce “meaningful art” to a culturally, politically, or instrumentally specific expression. It is intended to enlarge, not narrow, the Program’s focus — so that it is better able to support more of the artistic forms and creativity found in the culturally diverse Bay Area.

Implementation

We support organizations with strong connections or relevance to one or more of the types of communities included in our definition. We have long worked with “community-based” organizations, and expect to fund more going forward. The Program has also funded organizations striving to become more relevant to increasingly diverse communities and expect to continue supporting a subset of organizations that are fully committed to this work and are midstream in making such a shift.

Employing a community-focused lens is new for us, and our lack of experience with this framework, and with many of the communities we intend our grantmaking to serve, presents a challenge, particularly given the small size of our staff. Identifying community-level characteristics that signal opportunities for investment, and determining where a community’s aspirations intersect with what we can provide, requires careful, nuanced work. We may not always know what we do not know, especially in parts of the Bay Area where public and philanthropic investment has been lacking.¹³ As we implement this strategy, we expect to learn a great deal about how we can best engage with communities, in part, by working with intermediaries, both as advisors and regranters.

Over time, we expect our grant portfolio to better reflect the Bay Area’s diversity along a number of dimensions. We will continue to support a wide range of disciplines, aesthetics, and traditions, including dance, media, music, theater, spoken word, and cultural arts. In order to transition the portfolio thoughtfully, we expect, at least at first, to reduce the total number of grantees. This shift will free up staff capacity and grant funds to learn, identify new grantees aligned with our goal, and support existing grantees that are working to adapt to the Program’s shifting focus. When seeking new funding opportunities, we expect to emphasize communities that have been overlooked and underfunded in the past, particularly those that have absorbed new populations due to displacement and other demographic changes. This will likely mean increased support in geographic areas outside the region’s urban cores, including suburban and rural communities.

¹³ Challenges identified by listening circle participants include scarcity of funding, inconsistent funding partners, inadequate or financially inaccessible arts facilities, and unresponsive civic agencies.

ARTISTS

GOAL *Artists throughout the region have equitable access to services, networks, and supports that are relevant and responsive to their priorities.*

The strength of the arts sector is fundamentally dependent on the strength of its artists. Changing business models, technologies, and audience behaviors mean that artists often have less financial support from nonprofit organizations than they once did. While artists have long struggled to be appropriately supported, recognized, and compensated for their work, they need more than recognition and pay to thrive. Artists need support to navigate many of the changes in we have described: to better align with evolving business models; seize opportunities presented by the changing ways art is created, distributed, and financed; and embrace collaboration across artistic boundaries and sectors, all while navigating the soaring cost of housing and workspace across the Bay Area. Our Artists strategy envisions a modest yet broad array of supports for artists, with particular attention to addressing economic and geographic disparities.

Implementation

Support for artists will be provided through three lines of work that will improve the ability of artists to develop and share their work, engage with audiences, and thrive in the Bay Area.

First, we will *support the provision of essential artist services*. Services available to support artists have grown dramatically in the past decade. They now encompass everything from discipline- and function-specific capacity building, such as perfecting a pitch, performance documentation, and business management to technical services and benefits, including fiscal sponsorship, legal aid, and event insurance. Because these services are still not available widely enough, the Program will strategically expand the critical and relevant artist services it supports, aiming both to ensure the availability of existing services in outlying parts of the region, and to support new approaches to artist services. Rather than seek to meet every need, our funding will focus on ensuring that critical and relevant services are available to artists throughout the region.

Second, we will *help strengthen and enlarge formal and informal artists' networks*. Networks foster social connections that facilitate knowledge sharing and mentorship, and are a mechanism for artists to connect with other parts of the arts ecosystem. They also provide critical support to artists, particularly those living far from the region's core, or whose processes and methods are undervalued or not widely understood by existing programs and institutions. We plan to support existing and new artist networks that cultivate communities of practice, strengthen emerging fields, and facilitate learning and development.

Current grantee, Teaching Artists Guild (TAG) began as an informal network of teaching artists who met to share experiences and lesson plans. The network filled a gap not met by any other service organization by connecting, free of charge, individuals in a fragmented field. Among other achievements, TAG members created a wage calculator that pushed the field to better support teaching artists.

Third, we will *deepen and broaden our current methods of providing artists with financial support*. At present, we work with a handful of intermediary organizations to funnel modest support to a small number of artists' projects. Through intermediaries, we expect to modestly increase this type support, and to do so in a more responsive and adaptive manner.

YOUTH

GOAL *All Bay Area youth have equitable access to high-quality arts education opportunities.*

Participating in the arts enables young people to develop their voice; learn about their own and others' cultures; and draw upon their innate creativity as a resource for learning, self-expression, and social navigation. Our Youth strategy aims to ensure that Bay Area youth, ages 5 to 25, have equitable access to high-quality, sequential, multidisciplinary arts education. This grantmaking strategy is realized through two substrategies: delivery of arts education programming to youth in the Bay Area, and support for arts education policy and advocacy work to encourage public investment at the state and local levels.¹⁴

IMPLEMENTATION

The **Program Delivery** substrategy focuses on organizations whose mission is to provide Bay Area youth with opportunities for high-quality arts education in school, after school, and out of school. We will prioritize organizations that address the inequities revealed in the data we collected as part of the strategy refresh, seeking to support, for example, organizations that serve schools with a majority of African American students, high-poverty schools, and rural schools where arts participation rates are lowest.¹⁵ The Program Delivery substrategy will continue to include support for creative youth development organizations, which integrate creative expression into programs focused on critical thinking and social awareness. These organizations have proved highly effective at developing young people's creative skills and agency.

Refreshed in 2018, our *Arts Education Policy and Advocacy substrategy (see here)* focuses on equitable access to arts education in the public education system, and the disparities in arts education access, participation, and quality for students in low-income communities and communities of color.¹⁶ The substrategy supports grantees that develop research to inform policymakers; act to ensure that schools and school districts comply with existing standards; and educate parents, teachers, school administrators, and policymakers about the benefits of arts education.

As part of supporting these substrategies, the Program will work to ensure all grantee organizations that provide some form of arts education to K-12 students, including those whose core mission is not education-focused, do so effectively and in ways aligned with the goals of our Policy and Advocacy substrategy. These efforts address a key finding of the strategy refresh process: While nearly two-thirds of the Program's current grantees offer some form of instruction to K-12 students, the quality and depth of these programs varies considerably. Our goal is to ensure that organizations the Program supports are not unintentionally exacerbating gaps in access, participation, equity, and quality in arts education.

SECTOR-WIDE CAPACITY: ADVOCACY AND INFRASTRUCTURE

To fully realize our strategies over the long term, we believe we need to build the sector's capacity in two areas: Advocacy and Infrastructure. These efforts are not separate grantmaking strategies so much as tools to strengthen the overall health of the arts sector in the Bay Area. Our Advocacy and Infrastructure grantmaking and our beyond-the-grant-dollars activities, such as workshops and convenings, are intended to be opportunistic and responsive.

¹⁴ These materials were originally prepared as part of the Hewlett Foundation's internal planning process and do not represent actions to be taken by Hewlett Foundation staff or by grantee staff at the foundation's direction. In particular, although some of the language used to describe our work may reflect the passage of legislation (based on inputs from grantees and experts in the field), the Hewlett Foundation does not lobby or earmark its funds for prohibited lobbying activities, as defined in the federal tax laws. The foundation's funding for policy work is limited to permissible forms of support only, such as general operating support grants that grantees can allocate at their discretion and project support grants for nonlobbying activities (e.g., public education and nonpartisan research).

¹⁵ "San Francisco Bay Area Executive Summary Report," Arts Education Data Project, December 2018, <https://hewlett.org/wp-content/uploads/2019/02/Hewlett-Regional-Data-Project-Summary-Report-2018-Final-1.pdf>.

¹⁶ The Program's Policy and Advocacy substrategy has a statewide lens, due to the policy environment and opportunities that working at a statewide level afford. Our Program Delivery substrategy is focused on the Bay Area.

ADVOCACY. Arts and culture leaders know they must work to overcome the marginal role to which artists and the arts are often relegated; demonstrate the myriad and important roles the arts play in our communities; and stimulate social and financial systems of support for artists and the arts. Building advocacy capacity helps these leaders improve their skills, and prepares them to cultivate allies in the wider community, in service to community priorities.

Our effort to build the capacity of arts leaders to effectively advocate will consist of three activities. First, providing *knowledge and training* on effective advocacy to artists and leaders, including board members of arts organizations. Second, investing in *research and policy analysis* to identify opportunities and help advocates generate compelling stories to make their case. Third, seeding opportunities for artists and arts leaders to build alliances with other community leaders by advancing *cross-sector and community-driven initiatives* as they arise.

INFRASTRUCTURE. The arts and culture sector needs resources to support its ongoing effectiveness, including capacity to adapt to changing conditions. Yet today's economic realities are exceptionally unfriendly when it comes to experimentation and change, whether evolving an existing effort or launching a new one. New and more targeted forms of infrastructure support will help the sector renew itself and become more adaptive and inclusive.

We will provide targeted support in three ways. First, we expect to support *strategic restructuring* of interested organizations through an initiative designed to reach a cross-section of arts organizations. By helping organizations evolve — through activities such as mergers, the restructuring of business or leadership models, or responsible dissolutions — we will encourage the sector's ongoing adaptation and renewal. Second, we will invest opportunistically in *new forms of infrastructure* that respond to the evolving ways in which people are engaging with the arts. We anticipate providing funding for new forms of field support — for example, technology projects that financially benefit artists — that may be particularly useful to under-resourced communities. Third, we will modestly expand our current efforts to *foster financial and facility planning*, including financial training and services, and real estate planning. We also will work with an intermediary to distribute a modest number of capital grants each year, continuing to prioritize projects led by organizations with limited access to capital that serve low-income and under-resourced communities.

CHANGES IN HOW WE WORK

Those familiar with the Performing Arts Program will find these strategies a logical evolution of our most recent strategic framework (2012-2019). The refreshed strategies, however, extend the Program's work in significant new ways. Implementing these revised strategies calls for some changes in who and what we fund, how we work, and how we learn.

We expect to refine our strategies and evaluate grantee alignment over the next one to three years. Changes in the portfolio will aim to strike a balance across the types of grantees we support in each strategy, while also attending to the interrelationships among the strategies.

Between 2020 and 2022, we expect to add only a modest number of new grantees that are highly aligned with our refreshed strategies. Some of these will be intermediary partners who are better positioned than we are to provide response services and grants to communities, arts organizations, and artists.

In the near term, the Program will not accept unsolicited inquiries. As we continue to develop our strategies, adjust our portfolio, and create new opportunities, we will share news on our [website](#) and through the Program's [newsletter](#).

We have much to learn as we embark on this new strategy. Implementation of the refreshed strategies will include ongoing monitoring, evaluation, and learning to ensure we remain open to feedback, and capable of adjusting to changes in the sector. In late 2022, we will conduct a mid-point evaluation of the refreshed strategies; in early 2024, we will begin the next strategy refresh. As is true throughout the foundation, we remain committed to making our work better by listening to our grantees, beneficiaries, and other partners, and sharing what we learn.

Expected Allocations by Strategy

The Program estimates its total grantmaking budget to be allocated across the strategies, as follows.



CONCLUSION

We remain firmly committed to the idea that the arts matter — for individuals to thrive; for community self-expression; and for creating connections in a society too often pulled apart by polarization, inequity, and individual isolation. Securing sufficient support for artists and the work they do has long been a struggle. Funding — including our own — has not benefitted as many members of the Bay Area community as it should have, nor has it kept up with changes in where people are living and how they want to experience art in their lives. Our refreshed grantmaking strategies are intended to address those challenges, as well as give arts leaders new tools to step into their role as civic leaders who are engaged with the hard work of building and sustaining thriving communities.

Changes to our strategies are necessary to ensure that our grantmaking supports the critical role that the arts can and should play in communities: holding up a mirror to people’s individual and collective experiences, forming and reinforcing connections with other communities, and contributing to the fulfillment of communities’ highest aspirations and deepest needs. We are deeply committed to the new strategies, and recognize that we have much to learn as we implement them. We look forward to learning, in partnership with those we are aiming to reach, to ensure the Hewlett Foundation continues to support a thriving arts and culture sector in the San Francisco Bay Area for the benefit of everyone who lives here.

APPENDIX

Developing the 2020 Strategies

To inform the strategy refresh process and understand to what degree our past approach to grantmaking suits the current needs of the local arts sector, the Performing Arts Program undertook a set of research projects.

First, we commissioned Helicon Collaborative to conduct an evaluation of our grantmaking between 2008 to 2017, to help us better understand whether and how our work has evolved and what its impact has been. This included interviews with numerous arts and culture leaders, listed below.

Second, we commissioned several reports to deepen our thinking about arts education. These included a [*regional version of the statewide Arts Education Data Project*](#), which shows where districts provide arts education for middle and high school students and in what forms. Reports for each of the 11 counties in the Bay Area where the Program makes grants are also available there. [*A survey of the Program's grantees working with youth*](#) shows what programs and where these organizations are providing arts education services to Bay Area youth—in school, after school, and out of school.

Third, two separate reports on arts advocacy were completed by Vogl Consulting: [*“Current Perspectives on Arts Advocacy & How to Better Support it in the Bay Area”*](#) and [*“Bay Area Arts Advocacy: A Historical Overview.”*](#)

Fourth, we convened six [*“listening circles”*](#) to learn about and better understand the needs and assets of artists, culture workers, and creative entrepreneurs from artistically and culturally rich communities that we do not currently support.

Finally, our [*Organizational Effectiveness - Equity, Inclusion, and Diversity grantmaking*](#) gave us an opportunity to test a different method of grantmaking through an advisory council, composed of expert grantees and external advisors, along with two Performing Arts Program staff.

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