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Transforming Arts Organizations Worldwide

Managing Community & Artist Collaborations

March 2024

Research Methodology

Research Question

How are cultural institutions setting up and managing creative relationships with community groups and artists?

To investigate this question, we conducted the following research:



Desk research:

- Industry scan for examples of creative projects and collaborations with artists and community groups
- Prior proprietary ABA research on impact measurement and program evaluation



Interviews with 7 organizations:

- 3 Visual art organizations/museums
- 4 Performing arts organizations
- 3 University affiliated institutions

Our interviews covered the following topics:

- Motivations for working with community groups and artists
- How organizations are identifying and selecting partners
- Setting up expectations and building contracts that frame collaborations and outcomes
- Processes for managing ongoing communications
- Internal management and resourcing
- Evaluation practices

Research Participants



Celebrity Series of Boston
Boston, MA



North Carolina Museum of Art
Raleigh, NC



Moss Arts Center, Virginia Tech
Blacksburg, VA



Royal Albert Hall

Royal Albert Hall
London, UK



Two Temple Place
London, UK



Wellin Museum of Art, Hamilton College
Clinton, NY



Zoellner Arts Center, Lehigh University
Bethlehem, PA

Executive Summary

1. Identifying partners for desired outcomes

- **Desired project outcomes determine selection criteria:** Many organizations are working with artists and community partners for a variety of reasons, and those motivations are critical to how partners are then selected for collaboration.
- **Several common motivations for working with community partners:** Many organizations mentioned a desire to shift the paradigm between communities and cultural institutions, share resources, and enhance the cultural vibrancy of communities through access to relevant and exciting works.
- **Core criteria for selecting community partners:** The core criteria for selecting partners and artists focuses on ascertaining common goals, values alignment, demonstrated past work and capacity to undertake a joint project, as well as their expertise and networks that they can bring to the table.
- **Building trust with partners before starting contractual conversations:** Before embarking on these kinds of partnerships, organizations must take time to build trust. This can be done in a variety of ways, such as demonstrating interest in a partner's work, meeting with artists regularly, welcoming partners into your space, and creating advisory groups.

2. Setting up partnerships and maintaining communications

- **Initial conversations are critical to scope expectations:** It is essential to take the time to have initial scoping conversations to set a baseline understanding of project goals as well as project management responsibilities and resources.
- **What contracts should cover:** Contracts should answer core questions around production needs, workshops (if any), funding, branding, marketing, and ticketing needs. There should also be clear outlines of timing and milestones.
- **Framing the value of organizations managing marketing assets:** Organizations are better placed to manage project marketing through existing institutional branding, professional staff, and internal budgets. This can be framed as a benefit for partners who can focus on other areas of the project.
- **Creating marketing rubrics:** Successful organizations leverage very clear documentation in the contract phase to explain how marketing is handled and set expectations for different types of projects.
- **Once projects have started, approaches to communication vary:** Depending on the nature of projects, and where you are in the project timeline, communication flows can be more or less formal. Naming internal points of contact can also help manage communication flows with core staff members.

Executive Summary

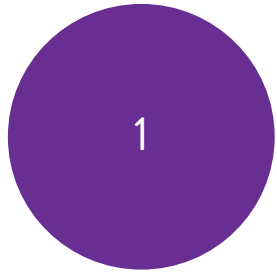
3. Internal management and resources

- **Leveraging small teams with support from diverse staff and contractors:** Typically, community partnerships are managed by small core teams from programming or artistic departments.
- **Setting up expectations to get other team buy-in:** While there may be overall institutional buy-in, it is still important to set up project expectations and the value of these initiatives to better integrate other staff when they are brought in to support on projects at different phases.
- **Striking the balance between partners' needs and protecting staff time:** Partners receive the most value when working with a consistent point of contact. However, one person cannot do it all. Organizations must manage the number of partnerships they can handle within a given period and find ways to integrate other support staff.
- **Working with volunteers is valuable but must be done carefully:** Working with volunteers can improve and broaden engagement with communities and partners. However, volunteer programs that are not managed properly can be perceived as exploitative. Volunteers should be involved more holistically and intentionally.

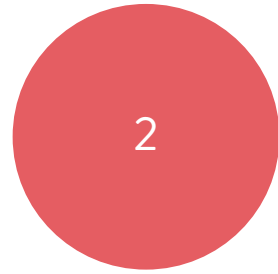
4. Evaluating and closing out projects

- **Organizations can focus on a few metrics that best reflect outcomes of projects:** Evaluating projects is not easy and can require additional resources; therefore, it is important to discuss with partners early on what they want from the partnership to identify most relevant metrics.
- **Organizations provide their partners with a variety of documents and data for their projects:** Organizations have the capacity to collect data on ticketed events and attendance and can deploy wide audience surveys. These are valuable resources for artists and communities to be able to learn about their work and impact.
- **Closing out projects with artists surveys and meetings:** Organizations can collect partner feedback through formal surveys and/or informal feedback. Internal meetings and reflections are also critical to assess partnerships from staff perspectives.
- **Partnerships don't end after the project:** Most organizations continue to maintain relationships with artists and partner groups after projects are completed. These can take on a variety of forms, including establishing alumni groups, building ongoing meetings with advisory groups, and honoring artists during big institutional moments and celebrations.

Report Outline



Identifying partners
for desired
outcomes



Setting up partnerships
and maintaining
communications



Internal management
and resources



Evaluating and closing
out projects

Section Outline



Identifying partners for desired outcomes

- Understanding different motivations for pursuing artist and community partnerships
- Aligning on core criteria when looking for potential community groups and artists to partner with
- General practices for identifying potential partners
- Different ways to build trust with partners and artist collaborators once selected

Sharing Authority and Supporting Artists and Communities

Understanding the **why** (i.e., the **value and relevance**) of community and artist partnerships, helps organizations be more effective and aligned.



Shifting the paradigm in cultural institutions

- **Listening to what communities want:** “Through relationships we can truly understand what they want... We want to amplify what they are doing rather than making them fit into the mold of what we have already done.”
- **Shifting traditional working models:** “Part of our commitment to change is changing the model of how we are working with groups that were historically marginalized.”



Sharing resources to support artists and groups

- **Sharing institutional resources:** “We are a support system. We are not trying to take over. Through our partnerships and resources, we want to enhance groups and artists doing great work. We see this as ‘*Leading by stepping back.*’ ”
- **Building visibility for young artists:** “We envisioned our program to support young artists’ careers. We selected artists on the cusp of larger careers, using our stage as a push for them and to create buzz.”



Enhancing cultural access and vibrancy for communities

- **Promoting local artists and cultural vibrancy:** “Our mission has always been to participate in the region’s cultural health. We work regularly with groups that feature and support heritage music that comes from right here.”
- **Leveraging the vision of young artists for new audiences:** “We are connecting our artist collaborations with our broader audience development plan. We can become more diverse and welcoming by promoting the lens of younger and diverse artists.”

What to Know Before Committing to a Partnership

“A lot of the work is understanding who to go to, and that has been learned the hard way by going to the wrong person first.”



Vision, values and leadership

- What are the values of the organization/and or artist we want to partner with? Is there alignment with our institutional values?
- For groups, how representative and diverse is their board? Is their leadership committed to equity?
- Do partners and artists share our institutional working practices and ethics?
- Who do they serve? What built-in audiences do they already have?
- Is there potential to embed their work in existing programs?



Projects and capacity

- What kind of projects has the organization/artist done lately in their community?
- What is their internal capacity to manage a project? Have they completed larger scale projects before?
- How much support will they need on the administrative side?
- Will they be able to draw their own members for events and help attract new audiences?
- Do they have an existing communication infrastructure: mailing list, newsletter, ability to post flyers/posters, etc. ?

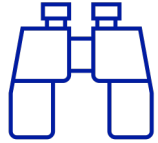


Expertise and connections

- What kind of expertise and legitimacy do they have within their communities?
- Have they worked with other partners in the past? (e.g., nearby businesses, neighbors, etc.)
- Can they connect us with community leaders to help build our institutional knowledge and understanding?
- Can they provide a regular contact person who is familiar with the neighborhood scene/culture of its residents?
- Are they willing to work with the community through workshops and other interactive activities?

Note: There is a distinction to be made between working with artists and community groups as creative content creators and co-producers or as experts and advisers. For certain projects, organizations may work with partners in a variety of capacities, both as creators and advisers.

Organizations Typically Manage their Own Research to Find Partners



Internal Research

Most organizations do their own research to identify artists and community groups they would like to work with based on an evaluation of their existing body of work and shared values.

This model requires considerable internal resources to identify potential partners and steward those relationships. However, it also allows for greater quality control and trust-building early on.



Open Calls

Some organizations do open calls for projects within specific settings, such as curatorial master programs to identify burgeoning artists that could benefit from these career opportunities.

While this model can help increase the pool of candidates and support lesser-known artists and professionals, it can also limit the quality control of people applying and requires more work to build trust over time.







Network Connections

Some organizations turn to their past and existing partners for suggestions of who they could reach out to for future projects.

This model leverages partner and artist networks to help identify future collaborators outside of the organization's existing scope. This model also validates partners as content experts.

Organizations Take the Time to Build Trust with Partners

“Ceding power while managing quality control is a fine balance and does require that built-in trust... mutual trust and respect is critical.”

What they do	 <p>Visiting partners at their sites...</p>	 <p>Holding framing conversations with artists...</p>	 <p>Having leadership welcoming partners on site...</p>	 <p>Setting up advisory groups...</p>
Why it works	<ul style="list-style-type: none"> ✓ Helps to better understand the kind of work partners are doing ✓ Demonstrates a commitment and investment to working together and being present ✓ Allows for organizations to get out of their institutional bubble, and to listen, look, and learn from others. 	<ul style="list-style-type: none"> ✓ Helps set up an open dialogue around project scope and the likely challenges that will surface ✓ Allows time to co-create a working plan with deadlines for shared accountability ✓ Demonstrates a commitment to the partnership and working through tense moments 	<ul style="list-style-type: none"> ✓ Provides partners with visibility among organizational leadership and project management staff ✓ Demonstrates full commitment to the partnership across all levels ✓ Allows leaders to carefully manage the handoff to the project team to facilitate next steps 	<ul style="list-style-type: none"> ✓ Helps build mutual trust and impact with artists and the communities they are representing ✓ Demonstrates commitment to learning from diverse perspectives throughout the process ✓ Supports the work of due diligence around the specific topic areas being explored

Section Outline



2

Setting up partnerships
and maintaining
communications

- Critical pre-contract discussions to set expectations
- Overview of what is included in contract agreements
- Positioning institutional marketing control for partner events
- Case example: NCMA's rubric for partnership marketing
- Examples of communication flows

Pre-Contract Discussions are Critical for Setting Expectations

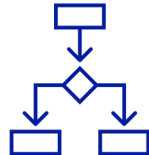
Project scoping expectations

Before drafting full contracts, it is critical that organizations take the time to work through project scoping to understand the scale of the work and the intended outcomes from both their side and that of their partners.



Understand aspirational wish-list and vision

Most organizations have initial conversations with each artist to discuss the kinds of projects they would envision and create an aspirational list to work with. From these ideas more concrete plans are outlined.



Establish learning outcomes and program connections

Organizations and partners come together to determine desired experiences and learning outcomes for visitors and ensure connections with wider institutional messages and programs.

Project management expectations

Once the project ideas have been validated, organizations must be transparent about management, timing, and cost implications, so all parties are set up to manage their respective areas of responsibility and react to changes effectively.



Determine shared responsibilities

Each party has different assets to bring to the table, so it is important to outline early on who should manage which areas of the project to effectively leverage respective expertise and resources.



Be transparent about resources to avoid conflict

It can be tempting to over-promise to partners; however, it is critical to be honest and transparent about the budget and resources available. This will support and maintain trust and respect along the way.

Overview of Formal Contracts and Areas to Formalize

What contracts should cover

Setting partnership parameters

- How long is your contract period? Do you want to establish multi-year or annual/fixed term agreements?
- Who is involved in overseeing contracts from the institutional and partner side?
- What parts of the agreement are fixed vs. amendable?

Establishing respective liability

- What is the scope of the project and expected outcomes for artists?
- Who is in charge of marketing and design?
- Who manages ticket sales?
- Who is staffing events? (volunteers, staff, etc.)

Defining timelines and project expectations

- Establish project milestones and timelines
- What are the deliverables to meet at different times?
- Who is checking on the status of these outcomes?
- How much time is built in for delays etc.?

Providing budgets and contingencies

- Expenses to include; artist fees for the overall project, materials, other workshops and activities
- Clear expectations and rules around how money will be spent
- Additional expenses/addendums to contracts as needed (renegotiations and rescaping)

Project templates are especially helpful when setting up agreements with first time partners

“We are always very transparent about how we budget our projects, and this is **especially important when working with artists that are less experienced in a presenting model.**”

We will be very **clear about expenses, and the in-kind support we can offer**, for example photo/video/design and equipment rentals.

Bringing all these detailed expenses together helps present a general overview of the project and what we can provide.

We aim to clearly identify contributions and needs of all parties to support effective planning and collaboration.”

~ Celebrity Series of Boston

Co-Presentation Guidelines for Celebrity Series & Partners

PRODUCTION

- Agreement on programming/casting
- Backstage tech
- Artist hotel, hospitality, transport
- Front of house
- Sightlines
- Freelance labor
- Determine presence in hall and FOH

COMMUNITY ENGAGEMENT

- What is possible? How will this integrate into current programs for one or both organizations?
- If public, offer both parties opportunity to attend.
- Audience Development such as Q&A w/artist

DEVELOPMENT/FUNDRAISING

- Project-specific grant funding to be shared by orgs.
- Open dialogue regarding any interest in fundraising around event (i.e., whether managed by one or both organizations)
- Discuss credits for foundations, sponsors, etc.

BRANDING

- Which entity creates design?
- Co-branded ads, program, etc.?
- Discuss credits for foundations, sponsors, etc.

MARKETING

- Need mutual agreement on strategy and budget for: online, print, radio, grass roots, Tv, direct mail etc.

PUBLIC RELATIONS

- Press release (authored by, 1 or 2 contacts)
- 1 entity seats press (2/contact)

PRINTED PROGRAM

- # of pages to each org
- Neutral or co-branded cover
- Income shared for any project-specific ad revenue
- Discuss credits for foundations, sponsors, etc.

TICKETING

- Which entity serves as main box office?
- Which box office #s and online address to include in ads?
- Will Call
- Confirm scaling with all parties
- Ticket prices
- Reflect any stabilization or facility fees
- Customer Service
- Discounts/Comps (all must be mutually agreed upon prior to implementation)
 - Subscriptions/membership
 - BosTix
 - ArtsBoston
 - Special Offers
 - Group Sales
 - Sponsors
 - Student Rush
 - Take Your Student
 - Staff
 - Press
 - Papering
 - House seats, protection, problem solvers, etc.

Note: Guidelines also include settlement issues to discuss and review, based on initial agreements and amendments.

Positioning the Value and Expectations Around Institutional Branding

Why it makes sense for organizations to manage event marketing



✓ Align marketing with other core programs

Controlling marketing helps ensure that partnership events are branded like other core programs, which in turn elevates the nature and visibility of the partnership.



✓ Organizations have clearer branding strategies

Artists are coming from an individual point of view, engrained in their creative practice. Organizations can therefore provide a more uniform and holistic marketing perspective.



✓ Relieve marketing burden from partners

Organizations have more established marketing processes and teams. They can take on the burden of time and cost, so their partners and artists can focus on other areas of their project.



✓ Provide other adjacent marketing benefits

On top of event promotion, organizations can also provide other marketing assets to their partners, such as visitor data, survey feedback, event images, and footage.



Securing internal marketing team support and buy-in

To properly market and promote partner events and leverage institutional branding, it is important to ensure that **your collaborative initiatives have the support and buy-in from the organization's marketing team.**

Due to a lack of clarity across teams, at NCMA they **created a partnership guide to ensure all teams were aligned** and aware of the marketing assets promised to partners for different project-types.

Indeed, the public won't know that an organization is co-producing and hosting an event unless there is a **visible way to say so on the main website.**

Another solution proposed, is to advocate for a **'Partnerships' page where people can see the breadth of the partners that the institution is collaborating with.**

NCMA Leverages Their Partnership Rubric To Manage Expectations



Signature events

Description: Long-term, recurring relationships that operate fully under the NCMA advancement; education, outreach, and audience engagement; or retail and visitor experience department and the marketing brand

Event management: The event is hosted by the NCMA and branded as a NCMA event.

Level of NCMA control/ ownership

High



Collaborator events

Description: Collaborator relationships are NCMA programs or offerings created alongside an outside entity. NCMA has an equal role in the event's creation, marketing, and execution. If ticketed, NCMA receives a % of sales.

Event management: The event responsibilities are shared, and the event is co-branded.

Level of NCMA control/ ownership

Medium/High



Associate events

Description: Associate relationships are events or offerings created by an outside entity and supported by the NCMA. There is limited collaboration between NCMA and outside entities on programmatic content though there should be mission and values alignment.

Event management: The external organization leads the project; the NCMA provides support in space and onsite event management.

Level of NCMA control/ ownership

Medium



Location event




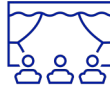
Description: The NCMA as an event location only. If an event includes food, *Catering Works* is the approver. If an event does not include food, the NCMA Deputy Director is the approver.

Event management: The NCMA is referenced only as the event location.

Level of NCMA control/ ownership

Low

NCMA's Partnership Rubric Outlines Marketing Responsibilities

	 Signature event	 Collaborator event	 Associate event	 Location event
Assets	<p>Assets will be created by the NCMA and approved by the external organization; only the NCMA logo will be used on these assets.</p> <p>NCMA name only NCMA Logo</p>	<p>The NCMA will approve all assets, whether created in or out of house; the NCMA logo will appear on all assets.</p> <p>NCMA Logos</p>	<p>The NCMA approves all assets, whether created in or out of house; limited use of the NCMA logo is available.</p> <p>NCMA logo limited use</p>	<p>External organization creates all assets, and there is no inclusion of the NCMA logo.</p>
Marketing	<p>The event will be listed on the NCMA website, promoted on social, shared via email, and promoted on campus. PR and ads are available given budget and/or needs etc.</p>	<p>The event will be listed on website, promoted on social, and shared via email. PR and ads are available given budget and/or needs. Both the NCMA and the external entity co-promote the event using the jointly created assets.</p>	<p>The event can be included in NCMA email and on social. Limited NCMA promotion</p>	<p>The external organization is responsible for sales, marketing, and/or promotion.</p>
	<p>Content: Content is written by the program manager, edited by marketing, and approved by the external organization as needed.</p>	<p>Content: Content is written by the program manager, edited by marketing, and approved by external organization.</p>	<p>Content: Content written by external partner, edited by program manager, and approved by marketing.</p>	<p>Content: The NCMA reserves the right to review and approve all assets created by the external organization.</p>
Ticketing	Tessitura	Tessitura	External Organization	External Organizations
Proceeds	% to NCMA	% to NCMA	0	0
Data	The NCMA and external entity share emails and/or ticketing data for post event follow-up.	The NCMA and external entity share emails and/or ticketing data for post event follow-up.	The email addresses and/or ticketing information are owned by the external	Data is owned by the external organization.

Adapting Communication Styles Based on Partners and Project Timing



At Moss Art Center, project types determine the extent of formalized communications flows

Organizations that are managing co-presentations like the Moss Art Center, where outside groups are bringing in their existing shows, tend to be logistically more straightforward.

In these cases, informal communication flows are often sufficient.

When informal communications work best:

- Known partners/artists
- Existing body of work (e.g., not new commissions)
- Repeat/cyclical events and programs
- Established practices

People involved:

- Communication rests with Director of Programming (and/or equivalents) and the Director of Marketing & Communications
- As event date(s) approach, production staff become more involved



At the Wellin Museum, communications become more formalized towards culmination of projects

Most organizations increase and formalize the cadence of their communication flows with artists and groups when projects are approaching their end.

At the Wellin Museum they increase their mandated meetings to once a week when they are 1 year out from project completion to make sure they are on track in the final months.

Format of meetings:

- Google doc with the agenda
- Anyone can include new items to discuss
- Benchmark against the work plan to see if there are upcoming deadlines to meet

People involved:

- Weekly meetings with the artist, exhibition designer, the curator and the assistant curator

Note: Across our calls, organizations use a variety of communication formats to stay in touch with artists and groups, including in-person meetings, Zoom calls, telephone check-ins, emails, and shared google docs. Having a direct line with artists, groups and/or project managers is critical to ensure ongoing communications and updates.

Opportunities to Involve Points of Contact From Across Staff

Assigning a dedicated point of contact within staff supports communication flows and overall institutional buy-in

To manage communication flows with their four Associate Artists, the Royal Albert Hall assigned each artist a dedicated point of contact from among their staff with whom they would be in touch with regularly regarding project updates and questions.



Objectives of this model

- ✓ **Benefits for the artist:** to ensure that artists had a **clear point of contact within the organization**, so they knew to whom they should reach out to with any questions or concerns, and with their project updates.
- ✓ **Benefits for the Hall:** having a dedicated contact person **helped streamline the communication process** and ensured clear **accountability and visibility into the project**. The point of contact is responsible for connecting with internal colleagues as needed and sharing updates with staff.



Selecting points of contact

- ✓ **Sharing load across departments:** Selecting people from across staff departments **helped lift some of the onus from the programming staff**. It also gave other teams more visibility into these collaborative projects.
- ✓ **Aligning skills:** People were selected to be points of contact based on their skills, social points of views and experiences that would **best align and support the needs and interests of each specific artist**.



Institutional Outcomes

- ✓ **Increased awareness:** Selecting points of contact from across the organization helped **raise more awareness and understanding for the Associate program outside of the programming team**.
- ✓ **Institutional buy-in:** Selecting points of contact from across the organization also helped make these **efforts more integrated across the organization** and fostered a **sense of shared commitment of resources and time**.

Section Outline

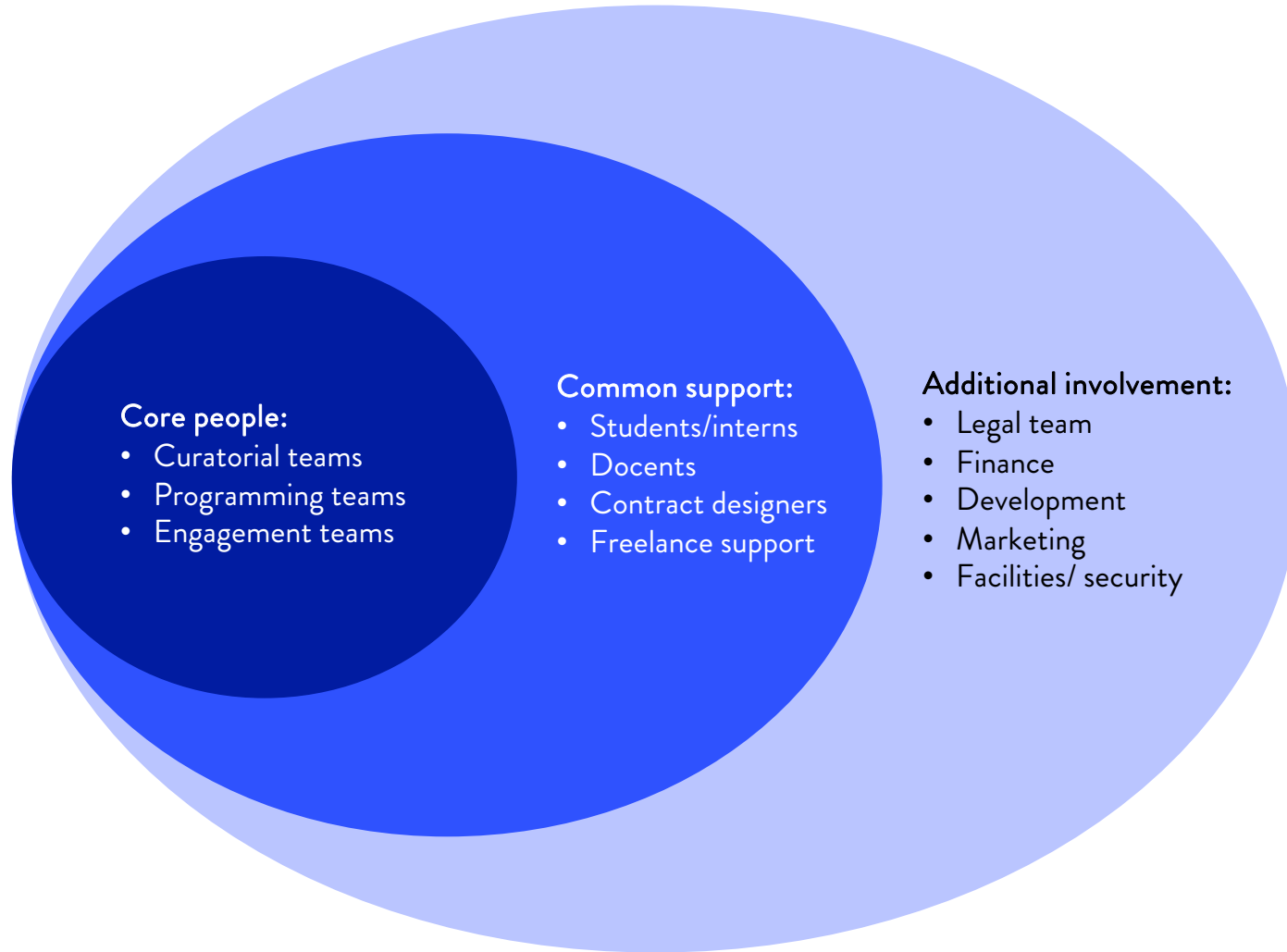


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Internal management
and resources

- Overview of a few core positions typically involved in managing artist and community program collaborations.
- Setting expectations with other staff and teams to get the support needed along the way.
- Finding the balance between fostering effective partnerships, while protecting staff time and capacity.
- Advantages and considerations when working with community members and volunteers.

Small Internal Teams Typically Manage Programs, With some Support



When asking other staff to step in and support on partner projects...



Explain the value of these efforts

Before asking staff to help on partner events, it is important to position these efforts as part of the organization's wider brand values and mission – therefore, a common goal for everyone to align on.



Address conflicting priorities and schedules

Some organizations manage conflicting priorities with teams (such as rentals and special events) by creating shared calendars to avoid scheduling overlap and miscommunication.



Be transparent about staff support needed

Programming staff often need support from facilities colleagues to set up and staff partner events. It is important to be transparent about the number of events, dates, and type of help needed.

Balancing Partner Needs for Inclusion, with Staff Time and Capacity

Depending on staffing structures and visions for growing partner initiatives, organizations must consider how they can continue to support partner needs and build trust, while protecting staff time and capacity.

The Situation: “One person can’t manage it all – but on the flip side, people have relationships with you, and your presence means something.”

Assigning one core contact from within the organization to build trust

“It’s important to be present to foster that sense of welcome and belonging. I make sure our partners aren’t suddenly paired with someone they don’t know the day of the event.”

Being a point of contact requires a lot of time and energy from staff

“That contact person participates in a lot of site visits and in-person meetings to build effective relationships. It’s an additional part of the job that we have to manage and regulate better.”

Saying yes to everything to serve the mission despite staff capacity

“Post-pandemic we were trying many things to get the community back in, and we were saying yes to a lot of projects that we didn’t actually have the capacity for.”

Solutions to staff time and capacity

- ✓ **Formalize how many partnerships** your organization can realistically handle considering staff size
- ✓ Determine early on which staff members can act as core liaisons with partners, ideally **sharing work with different departments**
- ✓ Consider expanding the programming team to **include someone from special events** to help with event management

Volunteers Provide an Opportunity but Require a Thoughtful Approach

To avoid tokenism of community members as volunteers, organizations should be very intentional in the way they solicit support. We propose the following approach to involving community members within the framework of partner events and collaborations.



Note: Community members that are brought in as content experts and participate as part of ongoing committees and advisory groups are typically compensated for their time and are seen as a distinct cohort from more ad hoc event volunteers. This model proposes aligning these two approaches to working with community members.

Section Outline



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Evaluating projects and closing out projects

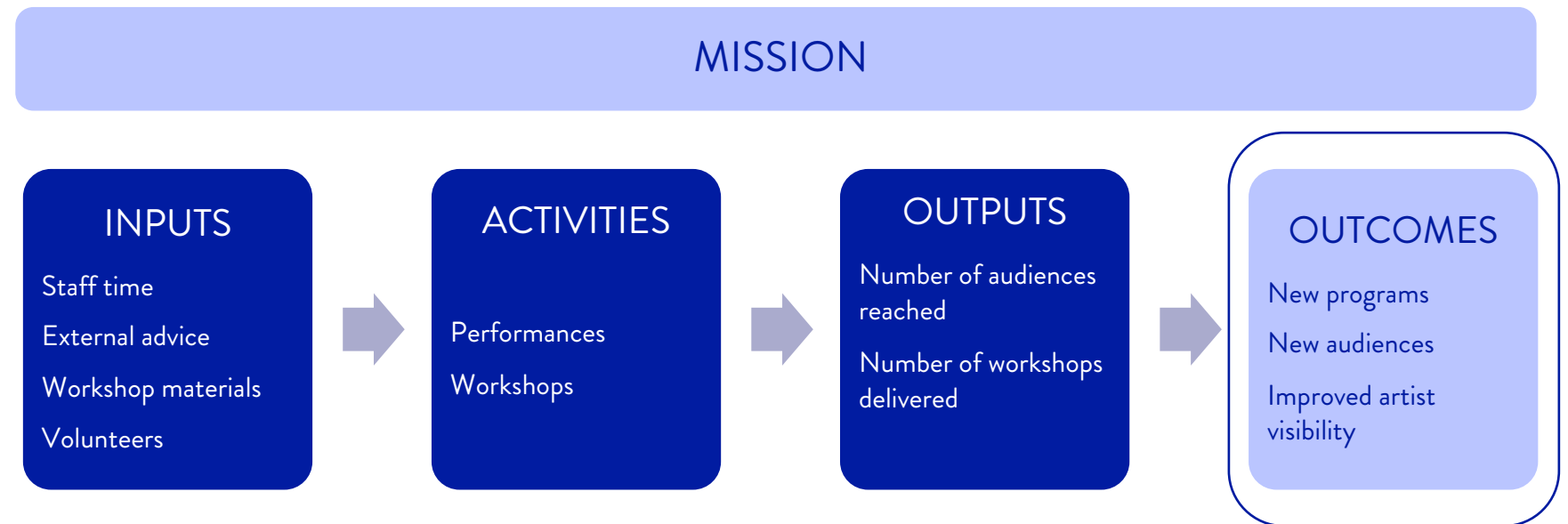
- Why organizations and partners should align on desired metrics early on
- Types of documents, data and resources that organizations can provide their partners as part of the closing out process.
- Artist surveys provide the most consistent partner feedback, while internal reflection meetings assess staff perspectives.
- Opportunities and examples for maintaining relationships with partners and artists.

When Possible, Aligning on Manageable and Actionable Metrics

Before implementing a new partnership project, it is helpful to define shared goals and outcomes that can then be translated into actionable metrics. **It is better to track fewer things consistently and make changes based on metrics rather than track many things and not act on them.** This ensures that throughout the lifetime of the project, everyone is working towards the same goals.

The following framework is adapted from Nesta UK's impact measurement approach.

Identify outcomes that would directly move your mission forward — this allows you to say no to certain metrics, so you are only focusing on those with the most impact on your actions.



Note: While dedicated resources to evaluations can be cost-prohibitive, some can be highly impactful if funds become available. The **National Museum of Asian Art** has invested in a low-cost, user-friendly surveying technology that allows anyone in the organization to pull helpful reports and dashboards — and with minimal training needed. The **Huntington Library, Art Museum, & Botanical Gardens** used funding from a capacity-building grant to bring on an Evaluations Manager who works across the institution to align metrics.

Partners Benefit from a Broad Range of Event Documentation

Overall documentation of partnerships and events is great for evaluation purposes and represents significant assets for artist and partners — who, in many cases, may not have access or the capacity to run regular audience surveys, collect data, and receive high quality performance footage.

Documenting partnership events



Performance data

As part of their partnership review, many organizations provide overall performance and/or event figures and statistics.

These reports typically include overall ticket sales, general attendance numbers, revenues earned and any demographics about their attendees they can access from their internal ticketing systems.



Performance footage

Some organizations also provide their artists and visiting groups with high quality images of their events, as well as occasional footage of performances.

These professional images and video assets are very valuable to artists and community groups, especially for young professionals building their brands and careers.

Additional audience surveys and feedback



Audience survey formats

Many organizations run post-performance surveys for their audiences across their entire programming season.

These surveys are not tailored to each show or for each partner but are general surveys that collect the same data across all performances.



Audience Data Collected

Through these organization-run surveys, artists and partners receive valuable data for their events.

Data points might include general performance feedback, enjoyment ratings, or how people heard about the event. One organization also asked for household income.

Note: Some organizations use the moment of sharing footage, images and other assets as an opportunity to also solicit informal feedback.

Surveys are a Comprehensive Way to Get Partner Feedback

Many organizations do not have formal processes to close out or evaluate partnerships, relying on more informal conversations and email exchanges for reviews. However, surveying artists is a great way to collect comprehensive feedback and evaluate partnerships across time as done at Celebrity Series of Boston.

The Help us improve Neighborhood Arts and Artist Connections Survey @ CSB

Allows Celebrity Series of Boston to...

- ✓ collect aggregate data on these initiatives
- ✓ review partnerships on a quarterly basis
- ✓ cross-compare over time to evaluate impact, success and ongoing efforts

Allows artists, groups and venues to...

- ✓ share how they felt about their collaboration with the organization
- ✓ assess areas that would improve future efforts
- ✓ share overall outcomes from their perspectives

Note: CSB complements their surveys with focus groups to get greater detail and context from their partners. Pairing surveys with focus groups is ideal.

Sample questions from the survey

Extent partners agree or disagree...

- During the planning process for my program(s), I felt like my questions and concerns were treated with care.
- Planning for the program(s) with Celebrity Series felt collaborative.
- Our partnership furthered my goals as an artist/organization.
- I feel comfortable approaching the Celebrity Series team regarding new ideas or alternative ways of doing business.
- I consider Celebrity Series to be an organization that is culturally sensitive to different cultures, racial backgrounds, challenges, and themes.
- I felt comfortable inviting my friends and networks to the program(s).

Open ended answers...

- What made it comfortable or not? What could have been changed to make it more comfortable?
- If this was your first time working with us, what do you wish you had known?
- How can Celebrity Series better support you or your community's needs? (Open ended)

Rank question...

- Please rank the value of the following resource areas that Celebrity Series contributed to the partnership, with 1 as the most important:
 - Cash contribution/financial support or artist payment
 - Production/project management support
 - Artistic programming/program content support

Best Practices for Regular Project Team Reflection

In addition to soliciting artist/partner feedback and impressions, organizations should also take the time to schedule regular staff meetings to review internally how their partnerships went and gather impressions from their staff's perspective.

When should we do team reflections?

- Reflections should be held after major projects are completed and fresh in everyone's mind (ideally within two weeks of project completion)
- As requested by team members or as challenges arise and as needed
- Regularly for general activities: at least quarterly

How do we run the session?

- Ask in advance to give people time to think
- Allow for anonymous participation, when possible
- Clear norms for in-the-moment participation, treating each other with respect
- Should be held in-person for best results and conversations
- Allow time for these sessions
Recommendations suggest 20min per team member involved

After-action review best practices

What should the agenda be?

- Round robin for everyone to share their experience around the project
- Chance to ask questions and clarifications about how things went, and intended vs. actual outcomes
- Summary of what was said and next steps

Who should be there

- Everyone involved in the specific project
- Assign someone to take notes and watch for time

Next steps after the sessions?

- Make sure you share the results and notes for the meeting but do not attribute quotes to individuals
- Provide concrete actionable recommendations to improve processes for future partnerships

Maintaining Connections with Artists, Groups and Community Advisors



Royal Albert Hall

Opportunities to create communities, networks and ongoing activations for artists

As the Hall reflects on their first cohort of Associate Artists, they hope to **create an alumni community of past artists** over time. They see this as an opportunity to generate ongoing networks and connections for young artists and **build a sense of community and legacy**.

On top of connecting artists together, the Hall would also like to invite their Associate Artists to return to the Hall for future events and special occasions **as part of a vision to continually engage and activate this group within their core programming**.



North Carolina Museum of Art

Maintaining connections with community advisory groups

NCMA is very intentional with how they set up **repeat and ongoing connections with their advisory committees beyond the initial project they participated in**.

For example, the museum has successfully maintained ongoing touchpoints with their Latinx committee that was established for their Frida/Diego exhibit to provide input from the community around ticket costs, programs, events, etc.

Years after the initial contact, the museum is still hosting meetings with this group. The Latinx committee was especially active in helping the museum develop bilingual labels as one example of ongoing impact and collaboration.

WELLIN

Celebrating enduring artist relationships during a special 10-year celebration



The Wellin Museum is very committed to **ensuring that their relationships with artists endure well beyond their initial collaboration**. This is typically sustained organically. However, for their 10th anniversary, the Museum held a more **formal series of events to celebrate and recognize these partnerships**.

As part of their 10th anniversary celebrations, the museum **created a video where artists got to share their experiences** working with the Wellin and the impact that collaboration had on their careers and practices.

Artists were also invited to share their perspective with alumni at an event in Chelsea. Finally, the Wellin hosted a more intimate family dinner **inviting artists and their partners to come together and reflect**.



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