

The Strategic Philanthropist Newsletter (TSP)

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TSP is focused on the rigorous application of strategic thinking in the field of philanthropy with an emphasis on the successful conceptualization, implementation, and evaluation of grant programs that ultimately achieve their intended result. It is our pleasure to share this living example with you.

Interview with Dr. Jan Young of the Assisi Foundation of Memphis

The Arts Audience Development Initiative

Assisi Foundation:

Since its formation in March 1994, The Assisi Foundation of Memphis has awarded over one hundred million dollars to not-for-profit organizations serving people located primarily in Memphis, Tennessee, and in the Mid South region surrounding Memphis. The mission of the Assisi Foundation is to "respond to the diverse needs of our community to support health, lifelong learning, social justice, and responsible use of resources with respect and compassion for all". The Foundation's grantmaking areas of interests include Health and Human Services, Education and Literacy, Social Justice/Ethics, Cultural Enrichment and the Arts.

Assisi Leadership:

Dr. Jan Young is the Executive Director of the Assisi Foundation. She earned her nursing diploma with honors from the St. Joseph Hospital School of Nursing in Memphis and went on to earn a Bachelor's Degree in Nursing from the University of Memphis and a Master's Degree in Nursing from UTHSC College of Nursing. Dr. Young also earned her Doctorate of Nursing Science (DNSC) as well as the Faculty Award from the UTHSC College of Nursing. Jan has experienced a career of progressive responsibility including Director of Nursing, Senior Vice President and Chief Operating Officer of a large Memphis hospital. She also teaches on the faculties of the UT Health Science Center and the University of Memphis. In 1995, she joined the Assisi Foundation as a Program Officer and ten years later she was appointed its Chief Executive, the role in which she currently serves. Dr. Young is also a member of the U.S. Army Nursing Corps Reserve and a graduate of the Air War College; she holds the military rank of Brigadier General.

Interview:

TSP: Dr. Young, the Assisi Foundation likes to work on long term, systemic challenges facing the residents of Memphis with a focus on eliminating the root causes. Tell us about an Assisi grant that was effective because you used this strategic approach.

Assisi: Well, this is just one example, but a few years ago several arts organizations approached us for various types of grants including support for marketing and fund

development. Separately, we were already partially funding a strategic plan for our local United Arts Fund which was in the process of exploring its branding and marketing possibilities. We thought there might be an opportunity to match the institutional and field interests to benefit everyone and the community.

TSP: So, you took advantage of an opportunity that matched a previous strategy of yours. How did you originally choose this specific problem to tackle?

Assisi: Initially we were only going to look at performing arts groups to see if we could help with their long term sustainability through an organized audience development effort. As it turned out, this was also a common thread among grant requests we received from several arts-related organizations. We met first with our United Arts Fund and asked what type of funding we might be able to provide that could have greater impact for the arts groups collectively. We wondered if it would be more helpful if we provided technical assistance or volume purchasing, or any number of other possibilities. In parallel, we were having discussions internally and with various arts leaders about the same issue of sustainability. We ended up hiring a facilitator and we helped convene a number of arts groups recommended by ArtsMemphis to discuss what we might collectively want to do in the area of audience development.

TSP: Once you knew that you wanted to help sustain and grow the arts market, how did you know which intervention would work?

Assisi: In the weeks that followed our first organizing meetings, we and the ArtsMemphis staff did a lot of research. For example, we looked at the work of the Wallace Foundation and others working in the arts. The Executive Director of ArtsMemphis met a specialist at a national conference who helped arts organizations reach new audiences. After more research, we reached a consensus to engage *Decision Support Partners, Inc.* (specifically, Ms. Surale Phillips) to provide the expertise and essential market research that would allow us to undertake the project. Their goal was to help the coalition to understand how arts organizations could better serve existing patrons. We also wanted to know what things cultural customers value most and what things keep potential patrons away. This research was time consuming but essential to designing a program that would ultimately be successful.

TSP: What did you look for in a nonprofit partner like ArtsMemphis to actually implement the solution?

Assisi: We chose to work with ArtsMemphis because (1) they already had good working relationships with a broad range of arts organizations in the community (2) they have solid leadership, (3) we had worked together on prior grant projects and they were accountable and trustworthy, and, (4) the new project leveraged an existing grant of ours.

TSP: Community challenges are often very durable and impervious to change. How do you know how much time to give your program to succeed?

Assisi: Although many foundations do not like our answer for how long a project like this should take, we have learned the hard way to respond “as long as it takes”. Some organizations take a little longer to learn to trust the group. Sometimes the process even moves backwards. We understand this and as long as the members of the collaborative stick to the scope of work and remain dedicated and flexible, we will stay the course.

As an example, some of the partners in the project were reluctant to share sensitive information. Others were suspicious that someone would get special favored treatment from the Assisi Foundation even though we consistently gave no assurances that any member would be funded during the development process. We also closely monitored the entire process and even provided the consultant and the group with office and meeting space as necessary. By staying deeply engaged, we were signaling to all of the participants that we were giving the project ample time to succeed.

TSP: Tell us the role of evaluation in the Arts Audience Development Initiative.

Assisi: Our goal was to assist our arts organizations with effective audience development as a way to achieve sustainability and independence. The process was organic and individualized. Although we paid for most of the consulting fees, the participating organizations also contributed so that they would have an empirical baseline for monitoring purposes. As an example, they each paid for the development of the psycho-geographic data for the community and the analysis of their current ticket holders/participants. They each developed goals and indicators to measure their success in growing their audiences in the future. Over 20 arts organizations participated. In addition, any future grant requests to the Assisi Foundation must include measurable progress. So, we basically all agreed that evaluation will be an important part of the project starting with data collection, analysis, and interpretation.

Perhaps the most rewarding result has been that the arts groups and ArtsMemphis continue to use and update the data. We see the results of the direct application of this information in their activities, marketing efforts, performance selections, grants requests, etc. In other words, evaluation has become integrated into their business models.

TSP: Do you have any early indications that the participants have expanded their audiences or their donor base?

Assisi: Absolutely! Early in the process, ArtsMemphis began to identify other potential donors for the project and to date they have been successful in getting new sustained support.

TSP: Funders eventually discover it's not just about the money. How is your staff organized to support your strategies?

Assisi: My program staff and I routinely provide a significant amount of non-monetary technical assistance by facilitating, convening, and connecting organizations. These efforts are at least as important as the money in growing the list of donors to the arts and in expanding audiences.

TSP: Most community problems are bigger than any one foundation. Do you support collaboratives of other funders?

Assisi: Clearly, we cannot do this by ourselves. We intentionally set aside a portion of our grantmaking to expand collaborative efforts in the community including among funders. We are still a part of several working funder partnerships in the areas of literacy, the community safety net, homelessness, community development corporations, emergency preparedness, etc. Some foundations make the mistake of dominating the process because they have the power. Once we've agreed on the scope of work we move to a monitoring and advising role. We tend to be the cheerleaders. Our role is to facilitate, not control.

TSP: After everything you have learned from the Arts Audience Development Initiative, is there anything you would do differently that other funders considering the same approach should know?

Assisi: Yes. It is a humbling process. In the early days we were probably too attached to a specific preconceived outcome. We stuck with our strategy but we have learned to trust the process. Many of these types of projects take a long time and when you engage groups of individuals to independently select the outcomes that are right for them, the results may look a little different than what you originally thought. We measure success in ways other than purely in outcomes. Certainly outcomes are important, but the lessons learned along the way can be invaluable.

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