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***Renegotiation:
An Overview of U.S. Arts Industry Insights,
2003-2007***

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While not a time of radical change or violent shifts in arts and culture, the last five years have witnessed a persistent renegotiation in the U.S. arts ecology. The relationships, expectations, balances, standards of practice, and mental models that had defined the professional nonprofit arts industry, in particular, over the past decades were gradually being redefined by environmental changes, and accelerated by the arrival of wide-access broadband telecommunications.

As examples, the relationship between artist, audience, and arts experience; the interaction of nonprofit, commercial, and informal organizations; the economic models that formed and sustained cultural endeavor; the role and behavior of individual and organizational philanthropy; the boundary between professional and amateur artists; and the perceived place of expressive activity in the life of cities and societies were just some of the areas under renegotiation.

Fortunately, at the same time, the research and reflective capacities of the industry seemed increasingly ready to investigate. The last five years saw a flurry of major studies, reports, and research initiatives (see “Readings and Resources”) that explored some of these renegotiations. Similar shifts in many other industries led to a wealth of relevant resources not specific to the arts, but directly related to their challenges. Finally, an emerging infrastructure of connection and commentary – through arts- and nonprofit-related weblogs and on-line resources – took significant shape since 2003, making discovery and discussion of these issues more accessible to all.

This briefing paper seeks to outline the key trends and tensions discussed in major research and analysis over the past five years (2003 – 2007), and provide a cloud-level view of how they relate to each other. While the true depth and insight dwells within the pages of the many reports and publications, this briefing intends to provide a map of the terrain for more directed discovery.

Audience & Artists

The most profound and pervasive renegotiation in the American arts ecology has been among artists and audiences. Questions of who gets to make art, who gets to define it, where and how art is experienced, and how those experiences connect with daily life were all shown to be in flux in major research projects and reports in the past five years.

After decades of focus and reflection on professional, nonprofit cultural organizations and the artists within them, there was emerging interest in the informal, amateur, unincorporated, or participatory arts. A series of research publications from Cultural Initiatives Silicon Valley showed these community and culturally focused arts experiences to be pervasive and vital in forming and reinforcing culture in the region. Further, the studies showed that artists of all technical abilities were making conscious and informed choices to *avoid* the nonprofit corporate form, because they believed that its structure and requirements worked against their particular goals.

Even among professionals, Ann Markusen’s analysis of the working lives of artists found them to be intentionally and continually moving between commercial, nonprofit, and informal settings, rather than remaining in a single sector. The research suggested that public

policies and private funders seeking to support individual artists often misunderstood these dynamics, and therefore missed significant opportunities to achieve their goals.

In a full range of industries, including the arts, the traditional roles of producers and consumers were also starting to blur. User-generated media – in the form of weblogs, videos, photographs, and the like – were beginning to transform expert-based industries like newspaper publishing, recorded music, and even software development. Cheaper and more powerful tools, combined with the networking of the Internet, made professional-grade production available to a large range of individuals, and offered new platforms for them to share and express themselves. In 2004, Charles Leadbeater attached a name to this new class of consumer/producer who brought not only enthusiasm but technical proficiency to their work. The “ProAm Revolution,” as he called it, had already transformed software development, astronomy, and other fields – forging productive and innovative new connections between amateurs and professionals. A similar wave of change seems probable for the traditional arts, as well.

Far from the on-line world in the traditional, live performing arts, research was discovering a much more complex contract between audience and artist than was previously understood. Audience Insight’s massive analysis of orchestra audiences published in 2002 had already suggested many layers of value surrounding a live symphony performance. Continued work with the Connecticut Commission on Culture and Tourism by that report’s author, Alan Brown, defined five modes of arts participation (inventive, interpretive, curatorial, observational, ambient) distinguished by the participant’s level of creative control. The “experience economy” first defined in 1999 was becoming a strategic reality for arts and entertainment organizations. And increasingly, the audience was an active partner in constructing that experience.

The 2001 RAND monograph entitled *A New Framework for Building Participation in the Arts* suggested that the complexity of audience decision-making in the arts demanded a more strategic and narrowed focus for arts organizations – requiring a choice between diversifying, broadening, or deepening participation. The emerging trends of the past five years reinforce this need for strategic focus, but also emphasize the importance of listening and responding to the range of values audience members derive from that participation.

Cities, States & Nations

The same renegotiation of roles and values between artists and audiences was also taking place at the public level, as cities, states, and the nation reconsidered how arts activities served community goals. While the conversation had been spinning for decades, the 2004 RAND report entitled *Gifts of the Muse: Reframing the Debate about the Benefits of the Arts* brought renewed attention and focus to the issue. With its rather withering evaluation of existing research on the public and social values of arts activities (in education, health care, economics, and public policy), *Gifts of the Muse* suggested a more balanced and rigorous effort to understand both the instrumental and intrinsic values of the arts.

In advocating for public funding and attention for the nonprofit professional arts, economic impact arguments remained predominant, even as questions of their rigor and relevance continued to evolve. The municipal competition to attract the “creative class” defined by

Richard Florida in his 2002 book remained a popular touchpoint, although civic and cultural leaders weren't quite sure what specific winning policies looked like. As attention turned more specifically to *young* knowledge workers (a particularly scarce and valued demographic, as defined in Joseph Cortright's analysis for CEOs for Cities), traditional nonprofits with established and older audiences were less able to argue their particular role.

In attracting and retaining knowledge workers, and supporting larger "quality of life" goals for cities, counties, and states, "vitality" became a catchphrase in cultural and community development in the past five years. While the word meant many things to many people – from density to diversity to level of activity to expressive opportunity – the largest initiative to explore and advance cultural vitality defined the term as "evidence of creating, disseminating, validating, and supporting arts and culture as a dimension of everyday life in communities." A capstone to a decade-long "Arts and Culture Indicators Project," *Cultural Vitality in Communities: Interpretations and Indicators* offered the most specific and comprehensive recommendations to date about what "vitality" might look like, and how it could be measured and evaluated over time.

At the state level, a series of reports from RAND sought to define the emerging challenges of state arts agencies, and map a path toward their future operations. From that report's perspective, the tradition of state arts agencies as "arms length" buffers between politics and creative expression had led to a system detached both from policy development and from the expressive lives of their states. The report recommended that agencies "reach both outward to the public and upward toward government officials" to be more active partners in the work of both.

As with culture and the city, state arts initiatives sought to become more integral to larger policy goals and broader public discussion. Many began developing "outcome" standards and measures to track and communicate that integral value over time. This focus on outcomes, rather than just activities, was also becoming a trend among nonprofits more generally, and cultural nonprofits more specifically (as detailed in the "Organization & Industry" section).

At the national level, research and policy initiatives in arts and culture launched in the previous decade began consolidating and closing shop. The Center for Arts and Culture – established by a consortium of funders – ceased operations in 2005. The Cultural Policy & the Arts National Data Archive (CPANDA), initiated and funded primarily by The Pew Charitable Trusts, continues operations but at a smaller scope and scale. Americans for the Arts, and the constellation of national service organizations in arts and culture, remained as the primary national voices for the arts in policy, practice, and research.

Organization & Industry

At the center of many of these renegotiations has been the professional cultural nonprofit organization. While the national arts system seemed to be rebounding from the social and economic shocks of 9/11, structural challenges emerged that were less likely to resolve with time. Among these were leadership succession, shifts in resources at all levels, and operational struggles following a cultural building boom during the previous 10 years.

In 2003, the Illinois Arts Alliance explored the coming leadership transitions among the state's cultural nonprofit, finding that 70 percent of executives surveyed and 90 percent of staff planned to leave their current position within the next 5 years. The same study found that three out of four organizations had no leadership succession plan in place to respond to that looming change. A 2006 study from The Bridgespan Group on the larger nonprofit field found much the same problem. Bridgespan identified four primary forces behind the leadership deficit, including a growing number of nonprofit organizations, the retirement of managers from the vast baby-boomer generation, movement of existing nonprofit managers into different roles within or outside the sector, and the growth in the size of nonprofits.

Another probable cause of the leadership challenge was that the job, itself, was becoming increasingly complex. The traditional resources that had fueled the establishment and growth of the nonprofit arts over the 1990s were in plateau or decline. Giving USA noted inflation-adjusted declines in giving to arts, culture, and humanities in 2005, as other sectors were seeing double-digit percentage increases. The looming human resource shortage (discussed as a challenge for cities in a previous section) meant increased competition for professional and volunteer staff. And evolving audience preferences and demands, described in the first section of this briefing, led to pressures on earned income, as well.

In 2001, the RAND report on the performing arts, *The Performing Arts in a New Era*, identified the likely future awaiting different sizes of arts organizations. It suggested that very large organizations would sustain themselves by dominating contributed income streams, retaining elite and influential board members, and maximizing earned revenue through popular performances, growing increasingly risk-averse. It suggested that smaller arts organizations would thrive and evolve in niche markets, balancing their limited revenues through low-cost and volunteer labor and community commitment. And the report suggested that mid-sized organizations would feel the greatest pinch – lacking the scale to weather the environmental shifts, but large enough to require sizable operating expenses and professional staff to remain as they are. Said the report, “The realities of aging audiences, escalating costs, and static or even declining funding streams will force these organizations into a serious rethinking of their primary mission, the audiences they want to reach, and their organizational structure.”

The past five years showed many of these dynamics playing out, as mid-size arts organizations began to rethink, reframe, and restructure their work. Niche markets and the Internet expanded small programs – often temporary, informal, and volunteer. And very large organizations weathering the change with large endowments and civic clout, although there were certainly storms in the process.

At the largest scale, the gala openings of multi-hundred-million-dollar cultural facilities over the past five years (in Philadelphia, Miami, Milwaukee, and elsewhere) – and the rather public operating and financial challenges that followed – underscored a growing concern about an industry heavy on fixed assets and overhead expense. As many of these large facilities were sold, in part, on their civic impact and public benefit, the political discussions of the previous section also came into play.

In response, some organizations and initiatives began exploring a focus on “outcomes” as a management and communications strategy for arts organizations. The Urban Institute and Center for What Works worked together to develop common outcome indicators and measurement strategies for fourteen nonprofit program areas, with performing arts among them. AMS Planning & Research began a related initiative with major performing arts centers. Responding to new emphasis on accountability, public value, and “return on social investment,” these outcome frameworks have already found a foothold in public and non-arts nonprofit sector management. They seem an emerging part of the future of cultural management, as well.

Finally, the established nonprofit professional arts faced the same challenges as many other expert-based businesses – such as newspaper publishing or the recording industry – in the shifting sophistication and production power of their consumers. Andrew Blau’s study of the future of independent media, among others, forecast the disruptive and transformative power of user-generated media in reshaping the production, distribution, and experience of creative work.

In the larger business world, companies and entrepreneurs responded to these shifting environments by reconsidering their traditional business models, perceptions, and strategies. In the strain and collapse of old paradigms, some discovered new opportunities to innovate. In his explorations of the evolving shape of consumer markets, for example, journalist Chris Anderson discovered many small suppliers flourishing, even in the face of increasingly massive and consolidated competitors. While the highest volume of sales and revenue was increasingly concentrated among a few “market winners” (blockbuster films, recordings, or books, for example), Anderson discovered that the Internet and other technologies offered profitability from the large number of lower-demand goods within what Anderson called “the long tail.” Entertainment and commercial culture providers such as Netflix and Amazon increased their profits and their market reach by ensuring that even low-demand goods were available for discovery and sale. This may well become an essential market dynamic for the nonprofit arts to understand.

Another strategic evolution, labeled “Blue Ocean Strategy” by authors W. Chan Kim and Renée Mauborgne, suggested a departure from traditional direct competition in crowded markets, favoring an innovative focus on value and mining new demand. The authors pointed to value innovators such as Southwest Airlines, Cirque du Soleil, and Starbucks, who had excelled in competitive markets by redefining the service. This strategy recalls the customer value and experience discoveries detailed in the “Audience & Artists” section.

With artists and audiences renegotiating the creative process; professional artists actively jumping between commercial, nonprofit, and informal sectors; and long-term shifts in resource availability and distribution; the traditional nonprofit arts organization will likely be subject to significant reconsideration and reconstruction in the decade to come.

Education

One of the major renegotiations in arts education has come from the enactment and impact of No Child Left Behind (NCLB). Under federal mandates established in 2001, accountability and evidence-based education reshaped how states and school districts

determined and evaluated their curricula. And while the arts were labeled a core subject under NCLB, they proved to be poor competitors for time, resources, and attention when matched with reading, math, and science.

A 2004 report from the Arts Education Partnership (AEP) suggested that the arts lacked comparable evidence of successful curriculum and reliable research on their impact across subjects, leaving them vulnerable to the new wave of accountability and school achievement measures:

Virtually every state has adopted standards for the visual and performing arts. However, few states incorporate assessments of arts learning into their accountability systems. The federal government has conducted only two national, limited assessments of arts learning during the past thirty years. Another is projected for 2008. Conventional wisdom holds that ‘what is tested gets taught’ and anecdotal reports claim that the arts and other school subjects are being denied time and resources as a result of time allocated to preparing and administering tests in reading and mathematics.

As with advocacy for the arts in other areas of public policy (such as economic impact), instrumental arguments played large in the call for sustaining arts education. Yet, tension continued to grow around the emphasis on such efforts, and their long-term implications on the arts in schools. Debate has continued since the influential REAP (Reviewing Education and the Arts Project) report in 2000, which warned:

Instrumental claims for the arts are a double-edged sword. It is implausible to suppose that the arts can be as effective a means of teaching an academic subject as is direct teaching of that subject. And thus, when we justify the arts by their secondary, utilitarian value, the arts may prove to have fewer payoffs than academics. Arts educators should never allow the arts to be justified wholly or even primarily in terms of what the arts can do for mathematics or reading. The arts must be justified in terms of what the arts can teach that no other subject can teach.

In response, an emerging stream of research explored the *integrated* benefits of arts and creative education in the broader curriculum. Rather than striving to promote arts education as a separate endeavor – directed primarily toward the practice, history, and aesthetics of expression – these studies suggested the transfer and integrative qualities of the arts *across* subjects. Nick Rabkin described the evolving perspective on arts education in *Putting the Arts in the Picture*: “At its best, arts integration makes the arts an interdisciplinary partner with other subjects. Students receive rigorous instruction in the arts and thoughtful integrated curriculum that makes deep structural connections between the arts and other subjects. This enables students to learn both deeply.”

This renegotiation between the arts, other subjects, curriculum, education policy, and public support continued over the past five years, but only in fits and starts. In some districts – Chicago and Minneapolis, for example – the arts became a central and primary tool in whole-school reform. In others, chronic budget constraints made such reform a low priority or a political impossibility. As revenue caps and a sluggish economy combined forces to put

severe pressures on public education, and testing mandates redirected attention to more testable subjects, the arts remained a point of advocacy and debate, but remained often on the sidelines.

In higher education, a major initiative launched by The American Assembly began to define and explore the role of colleges and universities in America's cultural life. The report identified several essential roles for higher education in the arts – certainly involving the training of artists, but also including the employment of working artists on faculty and staff, the commissioning of new creative work, the preservation and analysis of culture, and the integration of creative expression and exploration throughout campus life.

Finally, the power of lifelong learning in the arts was highlighted by a major and continuing study of the health effects of artistic involvement by seniors. While data results are still being analyzed, the multi-year, multi-city “Creativity and Aging Study” has already shown significant health, welfare, and economic benefits of connecting seniors with expressive opportunities directed by professional artists.

Philanthropy

With all the shifts in arts, artists, cities, communities, arts organizations, and society, a similar renegotiation in the various realms of philanthropy seems inevitable. Several studies in the past five years have tracked the changes in individual and organizational giving – often becoming more contractual and hands-on, often reinforcing the outcomes and “return on social investment” defined in earlier sections, and increasingly under the scrutiny of government for their business and giving practices.

Many of the traditional major national funders of arts and culture became less major and less national over the past five years, as the economy reduced their assets and desire for direct impact brought them closer to home. At the same time, significant assets in the system shifted to individual donors and managed philanthropy funds (often held by community foundations). These various changes will affect the costs, benefits, and strategies of all forms of contributed income for years to come.

Research for the 2006 Americans for the Arts’ “National Arts Policy Roundtable” showed systemic shifts in arts funding in most sectors of philanthropy. Giving to the arts as a share of all giving dropped from 8.4 percent in 1992 to 5.2 percent in 2005, a gap that equaled \$8.4 billion in 2005. Individual giving to the arts between 2000 and 2005 showed marginal growth, but also showed decreases in million-dollar gifts and planned gifts. Overall, individual donors were showing a preference for “high touch” giving opportunities, seeking direct involvement in making a difference in social causes.

The same summary study found a 65 percent drop in charitable corporate giving from 2000 to 2005, mostly from large corporations. Consolidation through mergers and acquisitions and a growing trend toward “strategic philanthropy” also impacted arts funding, which tends to be locally focused and less measurable in its public impacts.

In the larger philanthropic sphere, the past five years saw increasing innovation and experimentation in social intervention. “Venture philanthropy” sought to apply the dynamics

of entrepreneurial business and venture capital into the social sector. Other efforts in microlending, for-profit/nonprofit hybrid philanthropies (like Google.org), and the application of a variety of finance tools suggested new directions for giving and social change.

Conclusion

While the past five years were not subject to violent transition, they did see fundamental shifts in how the arts will be created, preserved, supported, distributed, and experienced in years to come. It's not yet clear whether the burst in research and analysis of recent years was an anomaly (the tail-end of a funding boom, perhaps), or an ongoing and integral research capacity for the field. Regardless, the individuals and organizations who hope to make a positive difference in the arts ecology in the *coming* decade will need to be more attentive, more reflective, and more innovative than ever before. Some rules for the road ahead might include:

- *Question old assumptions*
The renegotiations occurring at every level of our arts and cultural system suggest that the rules have changed. The foundations and forces that formed our current cultural infrastructure – specific alignments of wealth, labor, culture, demographics, and social values – are all shifting toward a “new normal” that will confound traditional ways of addressing the world. The engaged organization will embrace these changes through fearless research, honest and open evaluation, and celebration of dissent.
- *Consider the system*
The increasingly common awareness of “blurring boundaries” and “boundary crossing” between nonprofit and commercial, amateur and professional, structured and informal may be a sign that those perceived boundaries and distinctions are no longer productive. In a world where audiences, artists, schools, and communities are much more fluid in their expression and experience of arts and culture, it will be more important than ever to understand the whole, as well as the parts. Even for organizations that focus on a segment of the larger system – the nonprofit or public arts, for example – positive change will increasingly come from more thoughtful connections of that segment to its larger system.
- *“Weak ties” change the world*
Emerging research on complex networks shows that while “strong ties” between well-established partnerships and friendships can bind small parts of a network together, it is the “weak ties” of informal connection and affiliation that define the larger system. On the web, social networking sites like LinkedIn are designed to expose and expand these “weak tie” networks. Successful advocacy and change efforts into the future will do the same – both on-line and off-line. In practical terms, this means a new strategy and an enhanced staff capacity to maintain diverse and distributed networks of constituents, beyond the traditional partners and formal alliances that defined success in the past.
- *You can't change the players, but you can change the game*
The true power of change in a complex and interconnected system is in understanding and adjusting the rules that influence behavior: the real and perceived

barriers, incentives, and goals that drive the game. Every social system has these rules – public school systems, arts organizations, professional communities, cities, states, and nations. Sometimes, these rules are defined by basic public policy – written rules that encourage or obstruct certain behaviors (the “No Child Left Behind” act, for example). More often, however, the rules of the game are defined by larger goals, visions, and perceived self interests. This is where charismatic leaders and passionate organizations redefine success for those around them, with a clear and compelling vision of a better community, a better company, or a better world. The emerging emphasis on “outcome evaluation” is one approach to this kind of change. Successful change efforts in the future will require both mastery of the rules (analyzing and informing public, corporate, and social policies) and the goals (defining and amplifying a vision of success).

- *Listen more than you talk, learn more than you teach*

All of the recommendations above suggest a new dynamic for organizations and individuals who hope to promote positive change in an increasingly complex and interconnected world. For many organizations, this new dynamic will feel contrary to traditional strategies and awkward within established structures. It will require a culture that encourages subordinates to question their superiors, amateurs to inform professionals, audiences to collaborate with artists, and everyone to define, defend, and perhaps abandon the assumptions that drive their life and work. The effort to rediscover and develop this dynamic may well be the primary challenge of the nonprofit and public arts for the coming decade. That essential renegotiation of who we are and how we fit in the larger world will require all the insight, resourcefulness, humility, and passion we can muster.

Readings and Resources: 2003-2007

NOTE: This list is limited to works published from 2003 to 2007, and emphasizes efforts with national implications for understanding the arts and cultural ecology. This is not intended to be a comprehensive resource, but rather a selective list of major milestones.

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