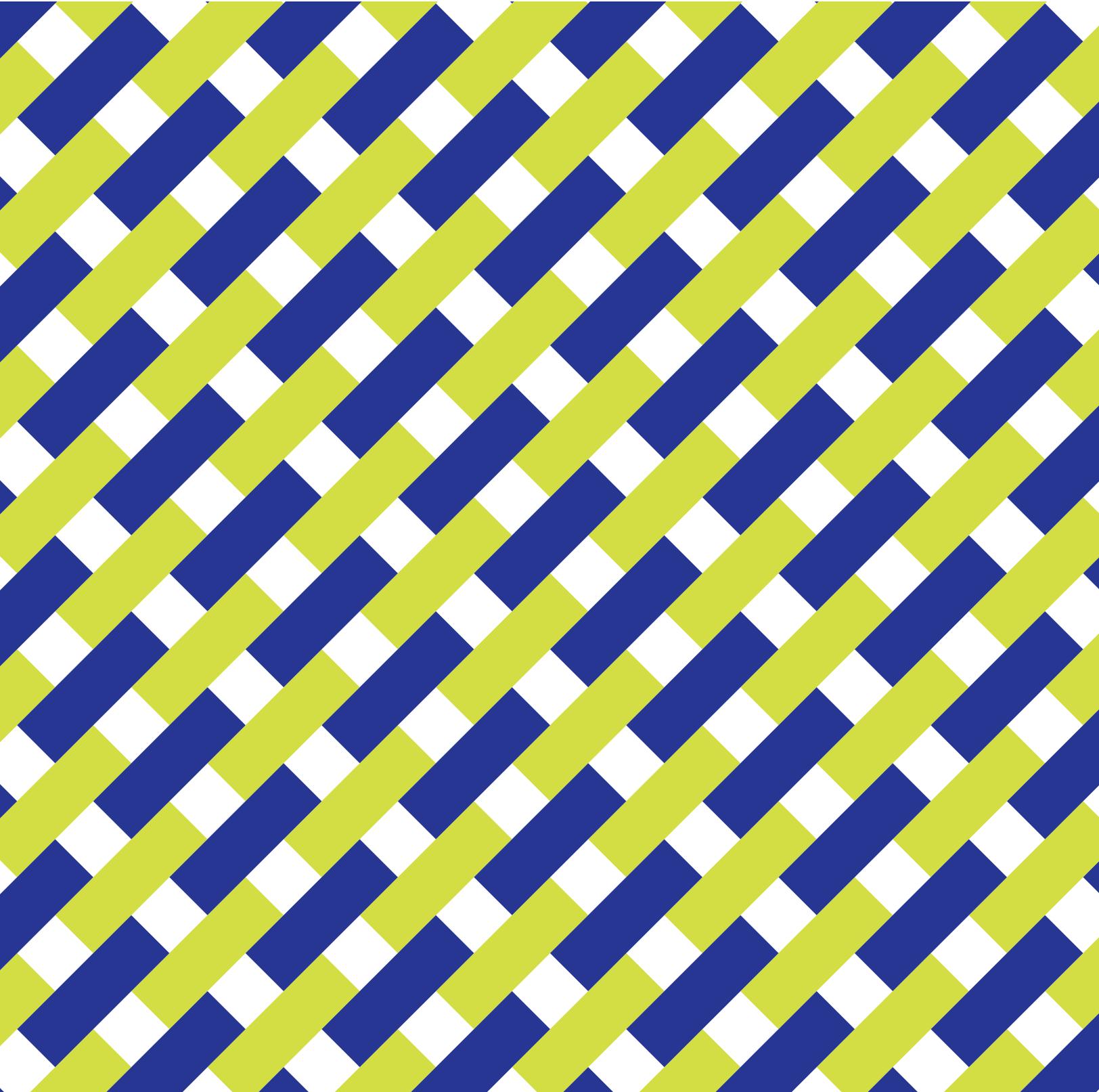


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March 2015

Needs Assessment for Arts Facilities

Howard County, MD

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1. introduction

Webb Management Services, Inc. is a management consulting practice for the development and operation of arts facilities. We work for governments, schools, developers, and arts organizations on facility feasibility, business planning, and strategic planning. The practice was founded in 1997, and we just started our 340th assignment. We have completed a series of studies in the Howard County region, including past work in Frederick County, Harford County, and a previous study in Howard County on the future of Merriweather Post.

For this first component of our work, we have been asked to establish if there is a need and opportunity to develop new arts facilities in Howard County. Our approach is to assess potential demand for facilities (on the part of audiences and users), the current supply of facilities, and how the development of new facilities might serve the broader goals of the County.

Then, if there is some consensus around the direction of our work, we will proceed to develop a preliminary physical and business plan for recommended facilities, considering how and where they might be developed, programmed, operated, and sustained. We would like to take this opportunity to thank all of the people who have participated in the study to date. A list of those interviewed is attached as Appendix A.

2. study context

Currently, promoting the arts is a component of three major redevelopment projects taking place in Howard County: Downtown Columbia, Historic Ellicott City, and Long Reach Village Center. This study focuses on the opportunities in Downtown Columbia and Long Reach Village Center.

2.1. The Community of Columbia

It is important to briefly note that Columbia is the result of one man's vision. Developer Jim Rouse set out to create a complete and balanced community, eliminating divisions between race, class, and religion. The result is a planned community located in close proximity to Baltimore and Washington D.C. that includes ten villages. The villages and their surrounding neighborhoods were developed to be full-service, with amenities close to home in order to provide for a high quality of life. The villages included a mix of housing, educational, recreational, religious, and retail facilities. That mix of amenities has contributed to Columbia's reputation as one of America's best places to live.

2.2 Downtown Columbia

Downtown Columbia continues to develop toward of goal of creating a place where local and regional residents and visitors can live, play, learn and work. Arts and culture are a central part of the current life and future vision for downtown through public art and performing arts activity currently at Merriweather Post Pavilion and in public spaces. Downtown Columbia Plan (2010) builds on existing activity, citing the redevelopment of Merriweather Post Pavilion, development of Symphony Woods as a cultural park, additional spaces for live performance and public art. The new Downtown Columbia Arts and Culture Commission has been established to oversee cultural activity in downtown Columbia and to develop and explore synergies between existing and new cultural institutions.

2.3 Long Reach Village Center

Once a vibrant center for retail, food and community in Columbia's Long Reach neighborhood, Long Reach Village Center is now relatively vacant. The vacant spaces in the Center include an anchor space that was formerly a grocery store, another large-scale vacant space, and a series of smaller retail and restaurant spaces. The Center is also home to the Columbia Art Center, operated by the Columbia Association. The Art Center features galleries, classrooms, outdoor space, and art studios, including a pottery studio with kilns. Programs focus on art exhibition and art education, with

classes offered year-round. The future of Long Reach Village Center—and its potential to become an arts destination—is a key motivator for this work.

2.4 Previous Studies

A number of previous studies have noted or addressed the need for arts facilities in Howard County, including the Howard County Arts and Culture Needs Assessment (1989); ArtsVision 2001 (1992); ArtsVision: State of the Arts in Howard County (2003); our work on the Merriweather Post Pavilion Feasibility Study (2004); and, most recently, the Downtown Columbia Final Conceptual Cultural Plan (2011).

Completed by Lord Cultural Resources in 2011 after 4 years of development, the Downtown Columbia Conceptual Cultural Plan utilized extensive research and community consultation to arrive at four key recommendations concerning the future of arts and culture in Columbia:

- * Further evolve and strengthen Downtown Columbia as a regional arts destination through the development of arts audiences, enhancement of existing programs, and creation of new programs and funding.
- * Serve as a catalyst for innovation and integration to increase resident awareness and appreciation of arts and culture.
- * Build the district by redeveloping existing facilities and filling in gaps in the infrastructure.
- * Ensure long-term sustainability and prosperity.

Specific facility recommendations included a welcome center; teen culture center; spaces for creation, production, and rehearsal; spaces for performance and exhibition; a multi-arts center with studios, theater, exhibition, meeting, live-work, and gathering space; artist live-work space; incubator space and, additional outdoor facilities that support community gathering and informal arts participation.

2.5 Recent Cultural Development

Columbia and Howard County have been quite focused on cultural development over the last decade or more. Following is a list of key projects and changes.

- * The owners and operators of Merriweather Post Pavilion are creating a master plan for the property that includes a facility renovation, which will allow for the facility to be more active and better engaged with the community.
- * As noted, the Downtown Columbia Arts and Culture Commission has been created in support of further cultural development in Columbia.
- * Symphony Woods, a project of the Inner Arbor Trust, will include a medium-sized amphitheater and extensive park amenities. Inner Arbor Trust is also developing plans for a separate complex that is proposed to include three flexible mid-size spaces all of which would be used for live performance and cultural events.

- * The Columbia Festival of the Arts has recently announced a shift in programming that will take it from an annual 16-day festival to an organization that presents cultural activity periodically throughout the year.
- * The Howard County Arts Council has received increased funding from Howard County Government to expand programs. In 2012, the Howard County Arts Council Board of Directors adopted its 2020 Strategic Plan. One of the key strategies noted in the plan is to expand space, either at its present campus or through the development of a satellite space.
- * Ellicott City has plans to apply for the State's Arts and Entertainment designation.

3. forces + trends

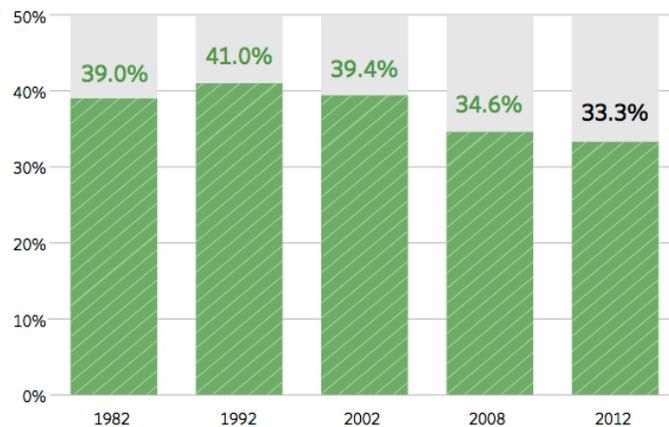
Before reviewing the market for new arts facilities in Howard County, we must review some broader forces and trends that will affect its operating environment.

3.1 Arts Audiences

First, it is important to understand the general characteristics and patterns of audience participation. Here are the basic facts about arts audiences based on recently released highlights from the 2012 Survey of Public Participation in the Arts, a national survey.

- * About one-third of adults attend live performance or visit museums or galleries each year. Over the last 20 years, participation within traditional arts disciplines has remained relatively flat. More specifically, a decline in levels of participation (percentages of adults attending various types of events) has been mitigated only by increases in the total adult population. The following chart shows the decline in

Percent of U.S. Adults Who Attended at Least One of Various Types of Arts Performance or Visited an Art Museum or Gallery: 1982-2012



Performing arts events included: jazz; classical music; opera; musical and non-musical plays; and ballet. These are all activities for which attendance rates have been tracked since 1982.

The change from 2008 to 2012 is statistically significant at the 90 percent confidence level.

Percent of U.S. Adults Who Attended a Performing Arts Activity, by Type (Excluding Musical and Non-Musical Plays): 2002, 2008, and 2012

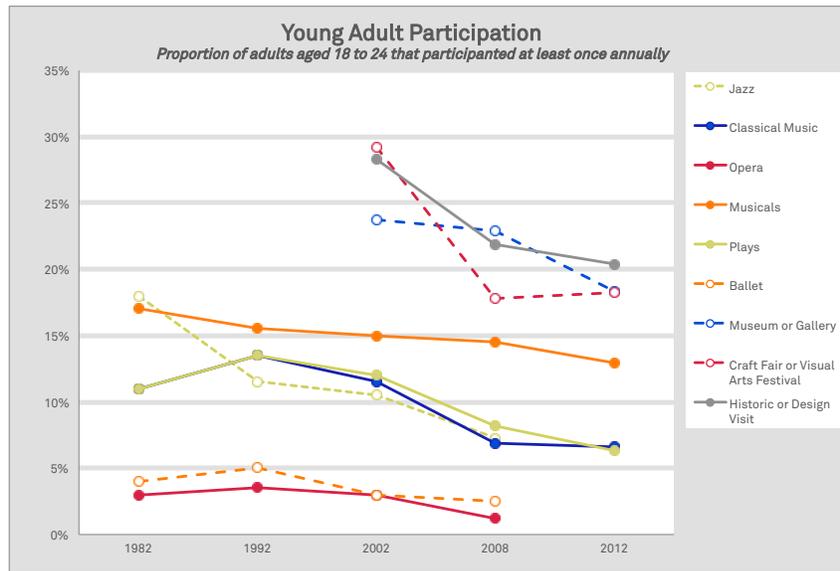
	2002	2008	2012
Classical Music	11.6%	9.3%	8.8%
Jazz	10.8%	7.8%	8.1%
Dance Other than Ballet	6.3%	5.2%	5.6%
Latin, Spanish, or Salsa Music	NA	4.9%	5.1%
Ballet	3.9%	2.9%	2.7%
Opera	3.2%	2.1%	2.1%

NA = This question was not asked before 2008.

Note: None of the changes between 2008 and 2012 are statistically significant.

percentage participation.

* The next chart shows the decline in participation by discipline. Other parts of the study suggest that attendance at traditional performing arts programs in more formal venues has been largely replaced by participation in a broader set of cultural and entertainment programs, including attendance at outdoor arts festivals, films, and other forms of live music, as well as the significant increase in those consuming the arts through electronic media.



* Participation in the traditional performing and visual arts amongst adults under the age of 40 has been on the decline for over 20 years. The chart to the right shows the decline in participation for 18-24 year olds from 1982 to 2012. We do not yet have all of the results for 2012, but here again we can see that arts participation is on the decline.

* Participation also varies tremendously by demographic characteristics. The following chart shows participation by gender, race, age and education. There is some variation with the other disciplines, but the trends are clear.

- Arts participation is on the decline for both men and women.
- By race, the African American population saw a slight increase in arts participation, while in all other categories participation decreased.
- Adults aged 55-64 have the best rate of participation (19%), followed by adults ages 65-74.
- Arts participation increases with

Percent of U.S. Adults Who Attended a Musical Play, by Selected Demographic Variables: 2008 and 2012

MUSICAL THEATER		
	2008	2012
ALL ADULTS	16.7%	15.2%**
Gender		
Male	14.4%	12.9%**
Female	18.9%	17.3%**
Race and Ethnicity		
Hispanic	8.1%	7.3%
White	20.0%	18.4%**
African American	8.6%	9.2%
Other	13.4%	11.3%
Age		
18-24	14.5%	12.9%
25-34	16.0%	13.6%*
35-44	18.2%	12.9%**
45-54	17.4%	16.8%
55-64	19.5%	19.0%
65-74	18.0%	17.8%
75 and over	10.0%	12.0%
Highest Level of Educational Attainment		
Grade School	1.7%	1.6%
Some High School	5.2%	2.9%**
High School Graduate	8.1%	8.3%
Some College	17.1%	14.6%**
College Graduate	30.1%	26.6%**
Graduate School	37.9%	32.1%**

*change is statistically significant at the 90 percent confidence level
 **change is statistically significant at the 95 percent confidence level

level of educational attainment.

- * Educational attainment is by far the best predictor of arts attendance. The propensity to attend arts events among those who have completed college is exponentially greater than for those who have finished only high school. With each advanced level of education, there is an increased probability of arts attendance.
- * Age also matters, but not nearly as much as education; older people tend to participate more, but only to a point.

3.2 Trends in Performing Arts Consumption + Patterns of Participation

Next, we consider some of the more important and recent trends in consumption of the arts and how audiences choose to participate:

Less Time and Less Planning: We are all busier today and less likely to make a significant investment of our precious time into any activity, especially when we are asked to make that commitment well in advance of the event. This has led to a propitious decline in subscription ticketing, as individuals are less willing to commit early and more likely to keep their options open until the last moment. This also means that there are more consumers now who are willing to pay more later—the perceived premium of flexibility and the “on-demand” lifestyle.

The Demand for More Stimulation: All consumers, and particularly younger ones, are acclimated to multi-sensory engagement. They are watching, hearing, and reading simultaneously (so they believe). This does mean that they have higher satisfaction thresholds and expectations for immediate rewards from the experience.

The Demand for Convenience: Audiences are also seeking convenience. There is less tolerance for the event with built-in hardships, whether that means an uncomfortable seat, poor concessions service, or bad traffic on the way home. This suggests a low threshold for opting out, and pushes facilities and presenters towards a higher level of customer service. It also inspires them to influence other factors that affect the audience experience, from parking to the after-show drink.

The Importance of Interpretation-rich Experiences: We have determined that the quality of experience for audiences is dramatically improved by properly preparing them for the experience with information and context; then, more importantly, by providing them with the opportunity to process and share their experience with others. Secondly, we must now accept that audiences are less willing to accept someone else’s interpretation of an experience, alternatively wishing (often demanding) to develop and provide their own interpretation of the experience.

The Diffusion of Cultural Tastes: Because of advances in information and communication technologies, people are now interested in a much broader array of programs. This means both a fragmentation and diversification of tastes, both narrowing and broadening at the same time. Related to this is the abandonment of old boundaries and behaviors on the part of audiences.

The Paradox of Choice: All consumers are now faced with an extraordinary range of choices—whether that relates to food, cars or culture. With our hyperactive, consumption based economy, consumers are constantly being bombarded with those choices and exhortations to buy. For many consumers, there are simply too many choices being thrown at them, and they often shut down and make no choice at all. So, consumers are hungry for filters and enablers, people and services that will help them get past the paralysis brought on by too many choices. Word of mouth is the strongest version of this—a piece of one-on-one advice from a credible source. But people are looking for other filters and influencers—curators who can help them make these decisions.

Risk Versus Reward: Because of the cost (time and money) of participating and all of the other choices available, audiences are generally less willing to take risks, and more willing to pay large sums for a guaranteed “home run” experience. This is consistent with a pervasive trend towards “trading up” and the rise of VIP culture, where there is an attempt to create an illusion of exclusivity, status, and prestige. The challenge is, the more everything becomes accessible, the more some people want to be separate—which suggests demand for value-added, premium arts experiences.

The Social Experience: Research suggests that what is drawing audiences to the arts today is the opportunity for a social experience, as opposed to the more traditional attraction of intellectual stimulation associated with the performance. The good news is that this is a clear competitive advantage—the shared social experience not available to those at home, no matter the quality of their technology. The challenge is that presenters and facilities must deliver much more than what is on the stage, creating an environment in which the social elements of the experience are fully enjoyed.

The Role of Media: We now see the lower consumption of traditional media and the reduced role it plays in driving arts participation. At the same time, there is a proliferation of personal communications technologies and online word of mouth tools, including Facebook and the like. These tools are critically important as a means for consumers to spread word of mouth in a viral way. And they are even more important for cultural suppliers to build a community of friends and supporters in a world where consumer loyalty is largely a thing of the past.

Everyone’s an Artist: There has been a rise in self-directed, home-based living arts participation including everyday creativity like gardening, writing, crafting, photography, film production, cooking, and decorating through fashion, home décor, and art collection. Notably, a statewide survey published by the Maryland State Arts Council in February 2014 indicates that 25% of Marylanders consider themselves artists. Also, consumers are demanding more intense, “hands-on” arts experiences. This is evidenced by higher rates of personal and ‘amateur’ participation in community theatre groups, choirs, dance and movement classes, art and music classes, and more.

3.3 Nonprofit Arts Organizations

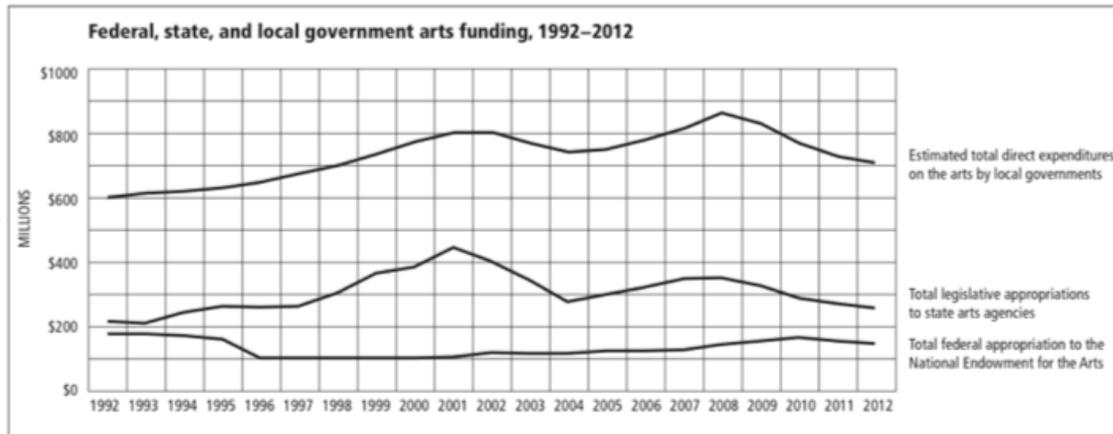
There are also significant changes occurring on the supply side, particularly around the health and sustainability of nonprofit arts organizations. Specifically:

Baumol and Bowen: These two NYU economists published “The Economic Dilemma of the Performing Arts” in 1965, positing that the lack of productivity gains in the creation of art, plus the inevitability of

cost increases, would essentially force all organizations to raise more contributed income every year. Though there have been marginal improvements in the administration of buildings and organizations, there is ample evidence of this cost squeeze, and increasing pressure on all arts organizations to raise more money to sustain operations. Even if an organization matches its prior year revenue targets and buys only what it bought the year before, the annual funding requirement will increase, year after year after year.

Supply Issues: According to the 2012 Arts Index report by Americans for the Arts, there were 113,000 arts and culture nonprofit organizations in the United States in 2010. The number of arts nonprofits has increased 49% in the past decade (76,000 to 113,000). This increase is greater than any other category of nonprofit organizations in the United States.

The Political Environment: It is also safe to say that we are now operating in a political environment in which direct support of the arts is declining and more difficult to attain. The following chart shows the rise and then more recent decline in direct government funding of the arts.



Private Sector Funding: On the private side, there is a fully developed philanthropic sector led by skilled marketers, technologists, and communicators, raising the bar for arts fundraisers and bringing new competition from sectors like the environment. In addition, the new generation of funders are much more pro-active and engaged in their causes, expecting to be given the ability to direct the organization and the use of their funds in a much more personal (and often intrusive) manner.

In summary:

- * A lack of productivity gains in the arts and culture sector means that creating is becoming, and will only continue to become, more expensive over time. Mozart's Symphony No. 31 in D major, for example, requires the same number of musicians to play it today as it did in 1778.
- * The number of arts non-profits in the United States is increasing. In addition to the competition for funding created by this increase, non-profit arts organizations also face competition from non-arts sectors like the environment and animal rights groups.

- * With national debt at \$18 trillion dollars, the ability of the federal government to directly support the arts is more challenging.
- * For Howard County, facing these challenges will begin and end with the County's ability to position the arts as an integral piece of the community's social fabric. It will be important to highlight the economic benefits of arts and culture, as well as their impact on quality of life.
- * Financially, balancing the budgets of the County's various arts organizations will increasingly rely on developing a community of ticket buyers and patrons. In our research, one interviewee posited that the County's lack of giving is a matter of corporate culture: There was once a time when company leaders viewed providing financial support to the community as a responsibility. That belief became a part of company culture, impacting the giving tendencies of employees who stuck around for decades. With the rise of startups and the increasing mobility of Millennials, this aspect of corporate culture has largely been forgotten, creating a gap in the patronage infrastructure. The trick, then, is to look for ways to develop such a culture both outside of the office and in the minds of young entrepreneurs.

3.4 Facilities Responding to a Changing Environment

So how should arts facilities like those being considered in Columbia respond to these changes in audiences and users?

From Friday Night Lights to Community Living Rooms: The old image of the theater—where the lights come on at 7PM on a Friday night so that fancy people wearing formal attire can attend a performance—is gone. The new image is that of a community living room—a place that is always open and always active—with informal programming and an atmosphere that is buzzing and welcoming.

Program Affects Place: A place becomes known for the programs it hosts, which means that places with strong curatorial instincts have the ability to become associated with the quality and types of programming that goes on there, such that, ultimately, consumers can be drawn there without any knowledge of the program or performers, solving for them the paradox of choice. Facilities must make programming choices that build and maintain a desirable and consistent image in the minds of existing and potential audiences.

Facilitating Active Participation: Facilities and their users must support a culture of more active participation in the arts and arts experiences, including audience engagement before, during, and after the experience. Buildings must also provide more opportunities for everyone in the community to express creativity—whether that means joining a choir, learning to paint, or volunteering to build sets.

Control of the Experience: Cultural norms of behavior around performances must change. Audiences (particularly younger ones) must be given more opportunities to decide how they would like to experience a performance, without disturbing those around them. Expecting younger patrons to give up all control of their experience of coming to a performance will only drive them away.

Don't Custom Build: Arts organizations will come and go given their fragile balance sheets and the competitive pressures they face. Facilities should be able to accommodate multiple users at once, or successive users in quick order, so as not to be dragged down by any one user facing a dark future.

Cost Structure: The future of facilities that serve the nonprofit sector depends on their ability to provide ongoing affordable access to nonprofit users, and arrangements that motivate efficient use of space and the maximization of revenues for both user and facility. Facility management organizations must be lean and nimble in their staffing, and embracing of technologies that drive operating efficiencies and economies.

Community Engagement: Fundamentally, arts facilities must become deeply engaged and connected to the life of their communities. They cannot be seen as palaces of the arts, but rather the literal or figurative center of the community. In order to survive, arts facilities must make themselves indispensable to the future of their communities in ways that are understood and embraced by all, whether that means hosting community meetings or acting as emergency response centers.

4. the market for arts facilities in Howard County

While it might seem like a simple exercise, defining a market (or audience) can actually be a complicated issue for arts facilities. In a fundamental sense, the market for arts facilities in Howard County is Howard County. But the County is part of a larger region, with additional visitors coming from far and wide. While those who live closer are likely to be more intensely involved and engaged in new facilities and programming, facilities will draw audiences, renters, and program participants from a larger area.

The other definitional challenge is that Howard County and the region are rapidly changing and growing, particularly in light of development plans for downtown Columbia and opportunities to enhance the Village Centers and Merriweather Post Pavilion, and to develop new cultural and community amenities in Symphony Woods.

Plans for new facilities must succeed when they open, but should also respond to growth and changes in the community over the next 30 years.

4.1 Definition + Characteristics

Our first objective in assessing demand for arts programming and facilities is to define the market and examine the potential to attract and serve additional audiences. Appendix B includes a set of demographic data highlights purchased from Nielsen, a marketing research resources company that expands and extrapolates Census data using a variety of inputs. The following charts compare figures for Columbia, Howard County, and the 15- and 30-mile radii around downtown Columbia. National figures are also included for context where appropriate. These data, along with input from interviews, allow us to characterize the resident market as:

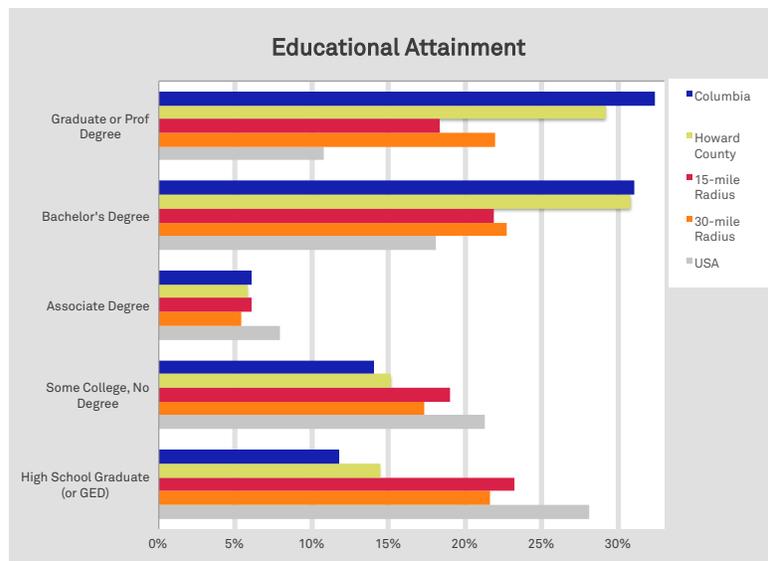
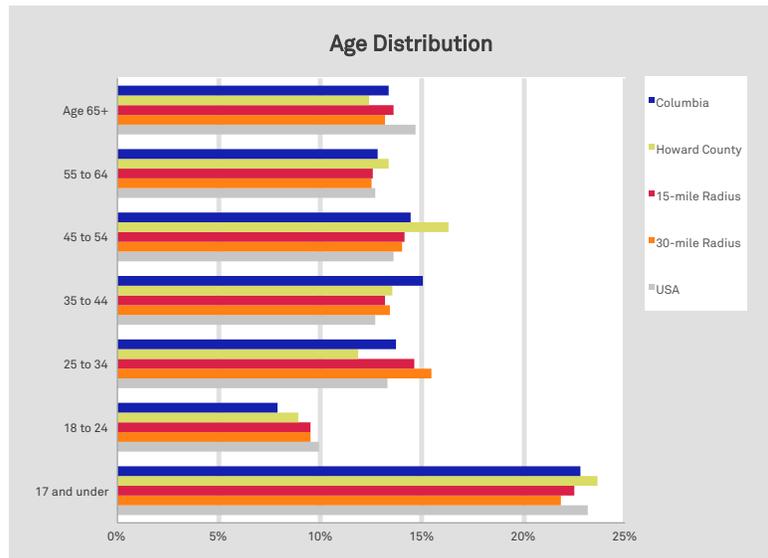
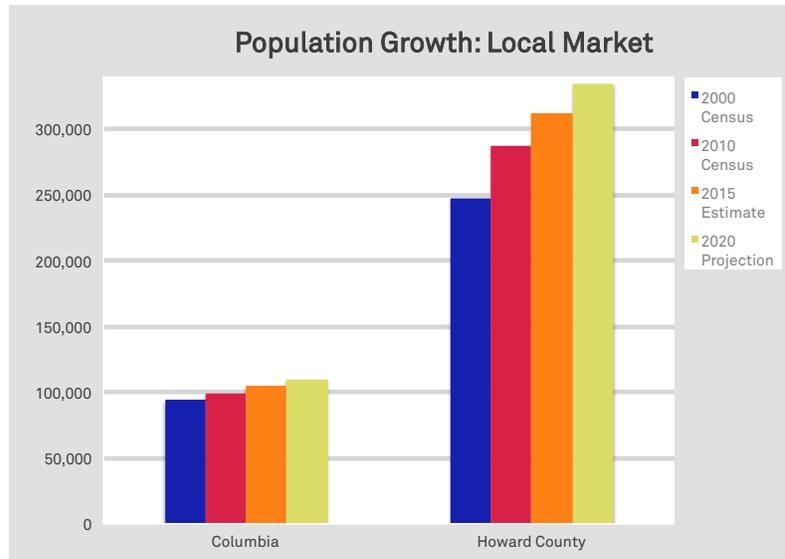
Growing: Howard County is a growing community. Between 2000 and 2010, the population increased by 15.83%. Between 2010 and 2020, it is projected to increase by an additional 16.60%. The populations in Columbia and the 15- and 30-mile radii are also growing, but at slower rates: 10.61%, 8.93%, and 10.53%, respectively. Columbia, for example, has seen a 5.82% increase in population between 2000 and 2010, growing from 94,137 to 99,615. By 2020, the population is projected to reach 110,180. The populations within the radii are considerably larger than in either Columbia or the

County, with 2015 population projections at 1.53 million for the 15-mile radius, and 5.42 million for the 30-mile radius.

Family-Oriented but Diverse in Age: Locally and regionally the population is diverse in age, although in all markets the majority is aged 17 or under (roughly 23-24%). This indicates a large number of families. In Howard County, there is a larger 45-54 population than in either Columbia or the region, while in Columbia there is a larger 35-44 demographic.

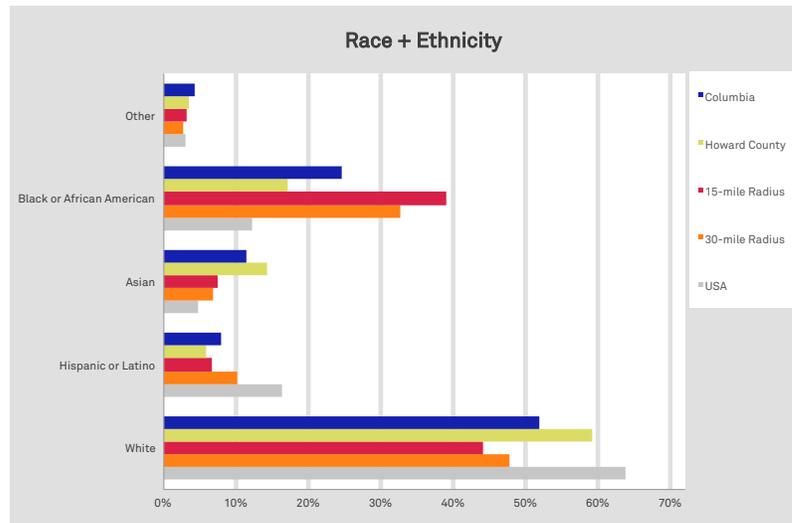
Affluent: Columbia and Howard County have very high household income levels. To compare, 28% of Columbia’s population and 34% of the County’s population has an income of \$150,000 or more. Nationally, only 10% of the population falls into this income bracket. Regionally, income levels tend to exceed national numbers, although they remain lower than in Howard County or Columbia. This is also true in terms of median household income, where, by 2020, numbers in Howard County are projected to reach \$123,535, while in the 30-mile radius they are projected to reach \$85,662.

Educated: Columbia, Howard County, and the surrounding radii have significantly higher levels of educational attainment than the nation. In Columbia, 32% of the population has a ‘Graduate or Professional Degree’ compared to 11% of the nation. An additional



31% of the Columbia population has a Bachelor's degree.

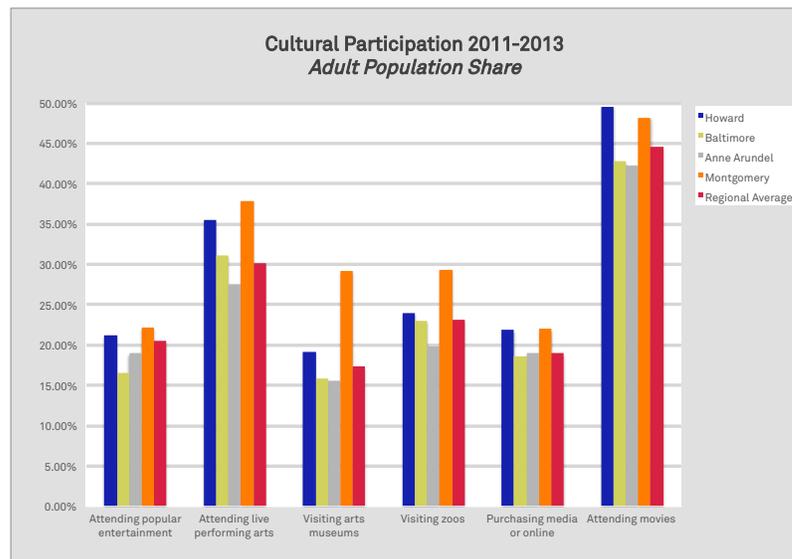
Ethnically Diverse: Racially and linguistically, Columbia and the surrounding region are diverse. In Columbia, 25% of the population is Black or African American, 11% is Asian, and 8% is Hispanic or Latino. Between 2010 and 2020, the Black or African American population is expected to stay the same, while the Hispanic or Latino and Asian populations will grow by roughly 2%. The White population is projected to decrease.



English is the primary language spoken at home, with 79% of the population speaking it in Columbia and Howard County. In addition to English, 6% of the population speaks an Asian Pacific Islander Language, another 6% speak Spanish, and roughly 2% speak a language in the 'other' category.

Data from Americans for the Arts Local Arts Index provides additional context on the market, suggesting that, of seven regional counties, Howard County generally has the second highest level of arts

participation and its residents spend more per capita on arts and entertainment than other regional counties.



4.2 Tourists + Tourism

Columbia is located in close proximity to both Baltimore and Washington, D.C., and has great potential to capture regional tourists from both of these markets. Locally:

- * Merriweather Post Pavilion already draws a large number of visitors from beyond the County borders.
- * About 30K tourists from 49 states and 39 countries visit the Howard County Welcome Center each year.
- * County indicators, including amusement and admission tax, room tax receipts and tourism promotion sales taxes suggest that County tourism is increasing.

Generally, tourism across the state is growing as well. As the ninth smallest state in the United States, Maryland provides visitors with an array of options within a relatively manageable distance of one another. The following facts and figures are from the 2015 State Tourism Marketing and Development Plan:

- * An estimated 36.1 million domestic visitors traveled to Maryland in 2013. The Central Region of Maryland—which includes Howard County—accounted for 48.2% of Maryland visitation.
- * Eighty percent of state tourists were traveling for leisure and 20% for business. Half were overnight travelers and half were making day trips.
- * Among Maryland’s top ten tourism activities are Touring/Sightseeing (10%), Historic Sites (10%), and Museum/Art Exhibits (8.5%).
- * The average party size of visitors is two, although 11% of 2013 visitors were traveling with children.
- * Most tourists in Maryland are traveling from within the state (34% of all trips to Maryland), followed by Pennsylvanians (17%) and Virginians (12%).

As the Downtown Columbia Cultural Plan notes, there is great potential for Columbia and Howard County to develop cultural tourism, particularly as visitors are already spending time at historic sites, museums and exhibits. Cultural tourists rank the arts, culture and heritage as their top reason for visiting a place and tend to spend more money and stay longer than the average visitor.

4.3 Market Summary

With significant levels of educational attainment and household income, Howard County is a market with considerable propensity and capacity to participate in and support the arts.

Key market segments include:

- * *Families:* Howard County includes a higher than average proportion of children under age 17. While family populations tend to fall off of the cultural radar for a number of years, there is still opportunity to engage families as a group as well as children independently—particularly teens.
- * *Ethnically diverse and foreign-born populations:* There is specific potential to better serve African-American, Asian, and a smaller but growing Hispanic/Latino population. Many of these folks are immigrant residents who tend to participate in informal arts that take place closer to home. Programming should engage these residents where they live, worship, and play in an effort to draw them out of their homes and to cultural spaces and places.
- * *Empty Nesters:* Howard County has higher than average numbers of residents between ages 45 and 64. Many of these folks are or are about to become empty nesters (and are current parents to teenagers). Research shows that empty nesters have more time, disposable income, and inclination to participate in participatory arts activities.

- * *Regional Tourists:* The County and State welcome a large and growing number of tourists each year, most of which are traveling for leisure with expendable time and resources. In addition, arts and cultural activities represent three out of the top ten tourism activities suggesting that many visitors have a cultural appetite.

5. potential uses + users

Over the course of this needs assessment, we met with local artists, organizations, community leaders, and members of the community to assess the levels and types of demand for particular cultural facilities and programs in Howard County.

5.1 Themes from Interviews + Additional Data

Following is a summary of themes on the local and regional arts communities and facility demand, as heard in an extensive set of interviews. Overall, feedback suggested that this is an exciting time for arts and cultural development in Howard County.

- * Local arts groups have limited capacity to fundraise. This is likely due to two issues, both of which concern the age of the community. First, Howard County's arts groups are young and underdeveloped with limited resources, but working to serve a sophisticated audience base that has an appetite and affinity for higher quality work. The second issue concerns philanthropy, also due to the age of the community. Strong traditions of philanthropy often take generations to develop. While Howard County certainly has the capacity to give, residents are not currently doing so. The Community Foundation of Howard County (formerly the "Columbia Foundation") has studied and is combatting this trend. The Foundation has partnered with a group of nonprofit, government, education, corporate and faith based community leaders to launch a campaign called *Live Generously*. Residents will be challenged to "sign a pledge" to *Live Generously* and increase their levels of giving.
- * This limited fundraising capacity means that a large number of arts groups are financially strained with limited capacity to pay rent for new facilities.
- * As noted, there are a number of facility projects in development that must be considered in relation to this work. Inner Arbor Trust is developing plans for an extensive arts complex that includes indoor and outdoor performance space and exhibition space. Merriweather Post upgrades are coming, the extent of which will soon be finalized. Improvements may be basic or may include additional performance space, rehearsal space, and amenities.
- * The Howard County Arts Council is the major arts provider in the County, providing important services and facilities to artists, arts groups, and the community. The Council has an extremely positive reputation and is highly valued by community leadership and the general public.

* The Columbia Festival of the Arts and Toby’s Dinner Theatre/Columbia Center for Theatrical Arts are also key players. Toby’s Dinner Theatre is in need of major upgrades and CCTA does not have a permanent location. The Festival will soon adjust its programming model to present four mini-festivals throughout each year.

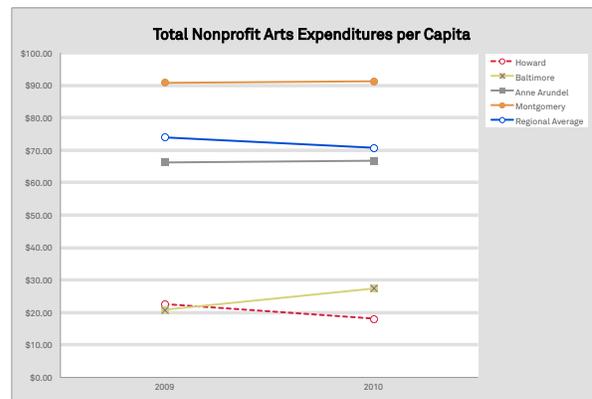
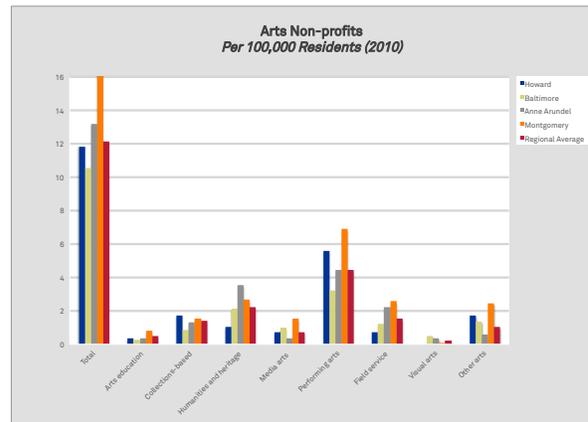
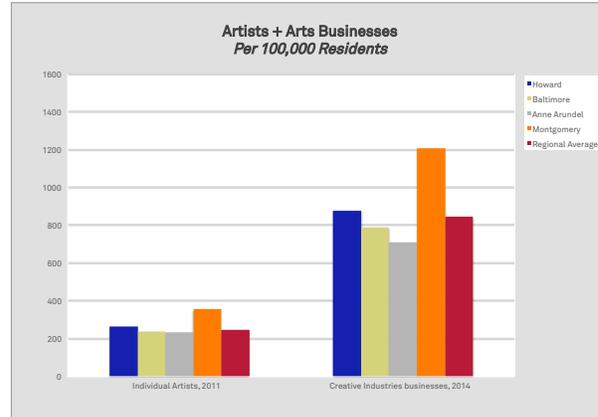
* The County is home to a large community of individual artists that have need for services, promotion, and space. In Ellicott City, for example, one group of artists has united to create the Ellicott City Arts Coalition, whose mission is to “bring awareness to the artist community and to engage the public in exploring the arts in and around our town”. For the past two years, the group has held an Ellicott City Artwalk, an event that opens artist studios to the public. This past year, the walk welcomed 200 to 250 attendees.

* Interviews suggest that there is also a community of writers in Howard County looking for spaces in which to work, share pieces, and build relationships. Currently, many travel to Baltimore or D.C. to participate in writing events held there, but are eager for a local facility.

* Here again, data from Americans for the Arts Local Arts Index provides additional context, suggesting that:

- o Howard County has the second highest number of individual artists and creative industries per capita of seven regional counties.
- o Howard County supports a total number of non-profits that is just under the regional average.
- o Howard County arts organizations spend significantly less per capita than arts groups in other counties.

Anecdotal information further contextualizes these data, suggesting that many County groups rely on volunteer or part-time staff and have little to no overhead as they present their programs at free or low cost spaces such as community and senior centers, libraries, churches and schools. The Arts Council has been working to address these organizational capacity issues, creating an Organizational Development grant program in 2007. The program



provides funding for County arts organizations to pay for staff or board leaders to participate in Leadership Howard County program (the grant will cover 1/3 of the cost) or to hire consultants (the grant will cover 3/4 of the cost) to assist with financial management, board development, strategic planning, or other capacity building efforts.

5.2 Survey Results

In order to better quantify demand for space, we also developed and, with the help of the Howard County Arts Council, issued a survey to artists and arts organizations in order to better quantify and qualify existing demand. Following is a summary of results.

- * Of 153 survey respondents, 91% are based in Columbia or Howard County. Respondents include a good mix of performing and visual arts organizations and individual artists. Most (about 94%) use facilities in Howard County, primarily Howard County Center for the Arts, Jim Rouse Theatre, Slayton House, and Columbia Association Arts Center.
- * More than two-thirds feel that new arts and cultural facilities are needed in Howard County, 9% do not feel they are needed, and 19% aren't sure. Of those that do think that new facilities are needed, their demand and thoughts on the types of need facilities vary:
 - o 48% have interest in using new performance facilities.
 - o 64% have interest in using new exhibition facilities.
 - o 53% have interest in using new arts teaching facilities.
 - o 47% have interest in using new meeting/event facilities.
 - o 29% have interest in using new rehearsal or performing arts studio space.
- * When it comes to performance facilities, potential users primarily require high-quality acoustics (61%), a large lobby and/or reception area (57%), a large stage (54%), film projection equipment (44%), storage (41%), and a floor suitable for dance (36%).
- * There is demand for exhibition facilities that include climate control (75%), security (65%), temporary storage (57%), and flexibility/moveable walls (48%).
- * As it pertains to arts classrooms, water access (68%), on-site storage (56%), and projection and/or AV equipment (52%) are most important.
- * Nearly 84% of those interested in using meeting/event facilities noted that they will need access to tables and chairs. Use of projection and/or AV equipment (63%), the ability to serve alcohol (46%), and a catering kitchen (45%) are also critical needs.
- * Requirements for rehearsal space or dance or music studios include late night access (63%), on-site storage (63%), a dance floor (53%), and mirrors (53%).
- * While there is good interest in shared administrative and production space (56% of respondents are interested in sharing admin, shop, and/or storage space) there is less interest (40%) in shared services such as box office, accounting, marketing, and other functions. Even still, 43 respondents are interested in some sort of shared service. Most are would like shared marketing and box office. Many respondents also noted a need for shared gallery/retail space.

Overall, a key theme coming through survey responses was that Howard County Center for the Arts is providing important facilities and programming to artists and arts organizations but that these opportunities must be expanded to provide more, larger and better facilities for performance, teaching, exhibition and shared artist work/sell space.

5.3 Summary of Demand

The following charts summarize potential use of particular types of space, combining results from interviews and the surveys. Charts showing utilization by user are attached as Appendix C.

User Demand: Performance Facilities (40 Users)					
	Performances	Rehearsals/ Tech	Other	Total	Desired Venue Capacity
750 - 1,000 seats (5 users)	59	53	1	113	750-1,000
500 - 749 seats (4 users)	167	157	162	486	500-749
250 - 499 seats (13 users)	148	333	42	523	250-499
Less than 250 seats (18 users)	105	165	48	318	Less than 250
Total (Days)	479	708	253	1,440	

In total, 40 users have need for new performance space, with the greatest demand in the 250 to 499-seat capacity range for 523 total days of use, which might include performances, rehearsals or other meetings and events. There is also notable demand for mid-size performance space in the range of 500 to 1,000 seats. A mid-size venue in this size range could accommodate more than 600 uses annually, largely due to one principal user—the Columbia Center for Theatrical Arts. A few users noted interest in using new performance space but did not estimate potential utilization.

There is also substantial demand for exhibition facilities, primarily on the part of individual artists. Fifty users expressed a need for exhibition space, and many have substantial need for a space that can also host lectures, classes and other events, amounting to demand for more than 5,000 use days. This is due to the desired length of exhibitions. Quite a lot of this demand is for small exhibition space with less than 1,000 square feet, though many artists were not able to estimate the size of space needed.

User Demand: Exhibition Facilities (50 Users)					
	Exhibition Days	Lecture/Class Days	Other Days	Total	
Large - 10K sf (2 users)	395	370	5	770	
Medium - 1K to 1,800 sf (7 users)	482	58	6	546	
Small - less than 1K (13 users)	1,270	564	12	1,846	
Unknown (18 users)	1,512	489	95	2,096	
Total (Days)	3,659	1,481	118	5,258	

Demand for classroom and studio space is also significant. Survey and interview participants suggested a need for space that can accommodate nearly 6,000 hours of teaching programs. In addition, respondents cited demand for rehearsal, dance, or music studios that can accommodate about 1,600 hours of rehearsal, teaching, and other utilization.

User Demand: 2D, 3D or Media Arts Classrooms (33 Users)

	Classes/ Workshops	Other Events	Total
Total (Hours)	5,138	860	5,998

User Demand: Rehearsal Space, Dance Studios or Music Studios (18 Users)

	Rehearsals	Classes Workshops	Other Events	Total
Total (Hours)	1,273	301	27	1,601

Finally, 27 respondents cited need for meeting and event facilities that can accommodate meetings, lectures, and special events. These needs range in size and facility requirements, but could amount to more than 2,500 days of use.

User Demand: Meeting/Event Facilities (27 Users)

	Meetings	Lectures	Banquets + Fundraisers	Other Events	Total
Total (Days)	1,280	1,032	90	119	2,521

Other organizations that are interested in using meeting and event facilities but not able to quantify their needs are Columbia Center for Theatrical Arts, ManneqART Inc., Howard Community College, Deelite Design/Ellicott City Arts Coalition, Howard County Arts Council, Ricochet Elm Studio, Howard County Public School System, and artists Caroline Creeden, Chas Downs, David Bagwell, and Douglas Hanewinkel.

These findings allow us to conclude that there is significant demand for new arts and cultural facilities in Howard County. Specifically, we found that:

- * There is high demand coming from Howard County's visual arts community for exhibition and classroom space—an estimated 5,258 days and 5,998 hours of demand, respectively.
- * Demand for meeting and event facilities equates to approximately 2,521 days of use.
- * Performance facilities and rehearsal space/dance studios/music studios have the least demand, although it is still high: 1,440 days for performance space, and 1,601 hours for rehearsal space/dance studios/music studios.

All numbers are estimates based off of information gathered in interviews and through the survey. It is important to note that a number of respondents and interviewees expressed interest in using space, but could not or did not estimate with what frequency. Additionally, it is unlikely that all members of Howard County's arts and culture community were reached by or responded to the survey. Therefore, it is quite possible that these numbers are conservative.

6. existing facilities

In order to understand the existing stock of facilities and identify any gaps, we have inventoried and assessed indoor and outdoor spaces used on a regular basis within and around Howard County (including Baltimore and Washington, D.C.) These facilities are organized into three inventories:

- * Live performance
- * Visual arts and other cultural programming space
- * Rehearsal/program (arts education) space

6.1 Performance Facilities

The inventory includes 30 facilities that host live performance on a regular basis (three or more performances a year) in Howard County and 95 facilities from the surrounding region. A full list can be found in Appendix D. Descriptions of the County's key facilities follows:

- * *Jim Rouse Theatre*: The Jim Rouse Theatre is one of the most sought after facilities in Howard County. At 747-seats, the facility has a number of the features that most surrounding facilities lack, including sufficient wingspace, fly space, and an orchestra pit. Additionally, the facility has lighting, sound, and projection equipment.
- * *Horowitz Center for Visual and Performing Arts*: The Horowitz Center for Visual and Performing Arts is located on the campus of Howard Community College. Facilities include the 424-seat Smith Theatre, a 250-seat Studio Theatre, and the 119-seat Monteabaro Recital Hall. While these facilities are well-equipped, none of them have fly space or an orchestra pit. Additionally, they are not available for outside rent.
- * *Toby's Dinner Theatre*: Toby's Dinner Theatre is a cornerstone of arts and culture in Howard County. The facility has lighting and sound equipment and uses Ticketmaster to sell tickets online. The facility itself, however, is quite old, in poor condition and lacks wingspace, fly space, and an orchestra pit.
- * *Slayton House Theatre*: Slayton House Theatre is equipped with dressing rooms, a green room, and a space for set construction. Additionally, the facility has lighting, sound, and projection equipment, but lacks wingspace, fly space, and an orchestra pit.

- * *Howard County High Schools' Auditoriums:* Most of Howard County's High Schools have well equipped auditoriums. Facility features vary, but many include wingspace, fly space, orchestra pits, lighting, sound, and projection equipment. Availability is often limited.
- * *Howard County Arts Center:* The Howard County Arts Center's black box theater has a capacity of 98. The facility has a sprung dance floor, basic sound and lighting equipment, and a selection of pianos.
- * *Merriweather Post Pavilion:* Downtown Columbia is home to Howard County's largest performance venue, Merriweather Post Pavilion (MPP.) Over the past 40 years, the Frank Gehry designed amphitheater has hosted acts that range from Jimi Hendrix and Janis Joplin to Green Day and Tom Jones. The facility features a sound system and video screens, uses solar panels to power the house lights, and actively composts.

In 2004, Webb Management Services was hired by Howard County to undertake a four-part study for the Pavilion that included an industry overview, a review of the Pavilion's operations, a needs assessment, and a business plan. At the time, the facility was struggling to compete with the region's newer, bigger venues. Our assessment concluded that, with certain physical and operational improvements, the facility was still viable as a large outdoor entertainment venue. At that time, we also recommended the development of separate cultural facilities to support local users and audiences.

Today, MPP is undergoing an extensive master planning process, and facility upgrades are anticipated in the near term. As previously noted, these upgrades may be basic or may be extensive, potentially including the addition of new rehearsal and small-scale performance space, user amenities, audience amenities and otherwise.

The inventories in Appendix D include detail on the physical features and types of activity hosted within each performance space. In addition, the condition of each facility has been rated using 8 variables. These include:

1. Facility condition
2. Staff and support
3. Theatrical functionality
4. Room acoustics
5. Customer amenities
6. Performer amenities
7. Atmosphere and character
8. Suitability for users

Variables are rated on a scale of 1 to 4, higher being better. Building condition and staff and support categories carry more weight than the other variables within a calculation that suggests overall quality. Some of these facilities have been visited by the consulting team, while other ratings are self-reported by facility managers or based on anecdotal information and interview input. Because of that, this exercise is somewhat subjective, but provides a good basis for comparison. Following is a summary of findings on performance space.

Facility Programming + Activity: The first chart in the appendix, organized by seating capacity, shows presenting (when facilities buy touring shows), producing (when the art is created by the building operator), educational programs (again when those are offered by the facility), and rental activity (in which case the work comes from another group that assumes the risk in using the facility).

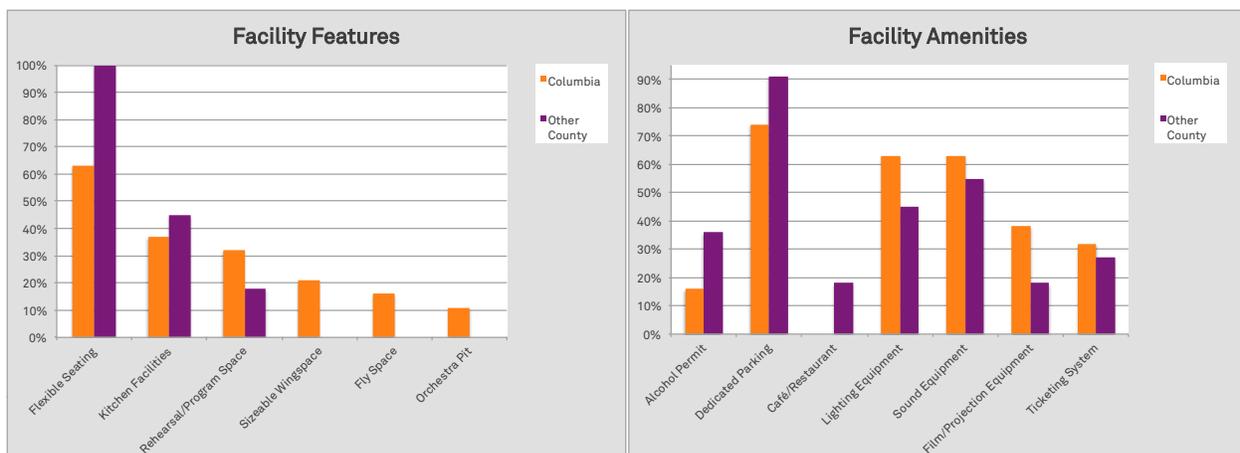
The chart shows that programming and producing activity in Columbia is diverse. Nearly half (47%) of the facilities produce their own presentations. Most of this activity, however, is on the part of local schools and/or universities. Of the facilities inventoried, Toby's Dinner Theatre is the only professional producing entity. Nearly half of facilities are available for rent to outside organizations. Largely, these facilities are not purpose built spaces, but rather, schools, community centers or churches with limited access and amenities.

In terms of touring product, Merriweather Post Pavilion and the Horowitz Center for Visual and Performing Arts are Howard County's primary presenting facilities offering an array of county, regional and national touring arts in traditional disciplines, including music, dance, theatre, and film. The Columbia Festival of the Arts is another key presenter, now moving from a long summer festival format to more frequent mini-festivals scheduled throughout the year. Without question, the size, features and availability of facilities limit the type, level and quality of touring activity in Howard County. More specifically:

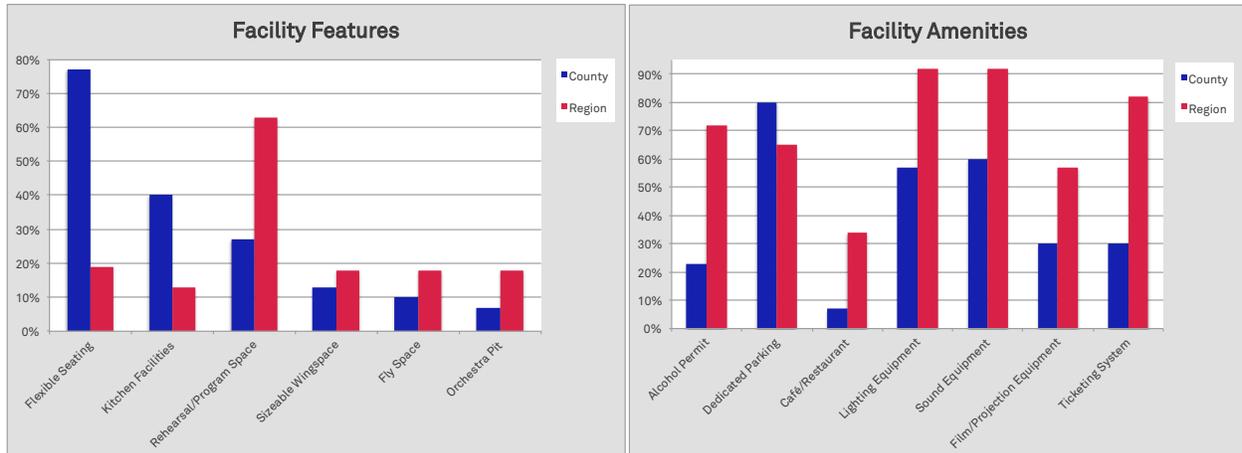
- * Throughout Howard County, music is the most frequently presented art form in the County (presented by 23% of facilities).
- * Family programming is also prevalent.
- * Touring dance and theater are only presented by the HCC Horowitz Center for Visual and Performing Arts.
- * Overall, despite Howard County's diverse population, there is limited presenting activity, particularly activity that reflects the diversity of the population.

Regionally, there is also a large amount of producing activity (69% of facilities.) Music presenting (31%) is also prevalent throughout the region as well. There are a larger concentration of facilities presenting dance and theatre (16% and 12%, respectively).

Facility Features: The next chart in the appendix shows facility features and amenities. This data is also summarized below. The first two charts compare the features and amenities of facilities in Columbia to those in the County.



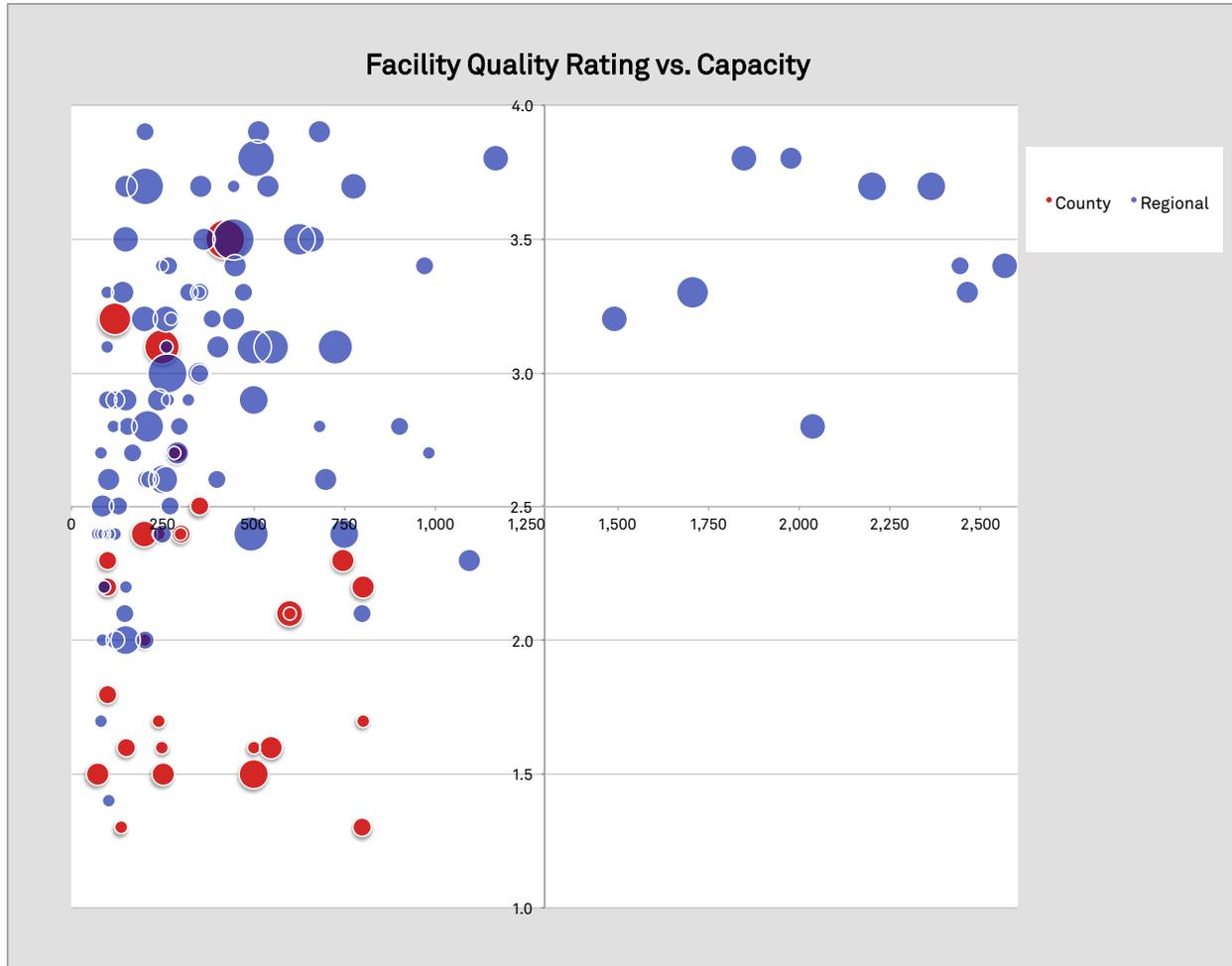
From these charts, we can see that facilities in Columbia tend to be better equipped than other County spaces, with rehearsal/program space, wingspace, fly space, orchestra pits, and sound, lighting, and film/projection equipment. There are more County spaces, however, with kitchen facilities, flexible seating, alcohol permits, and dedicated parking.



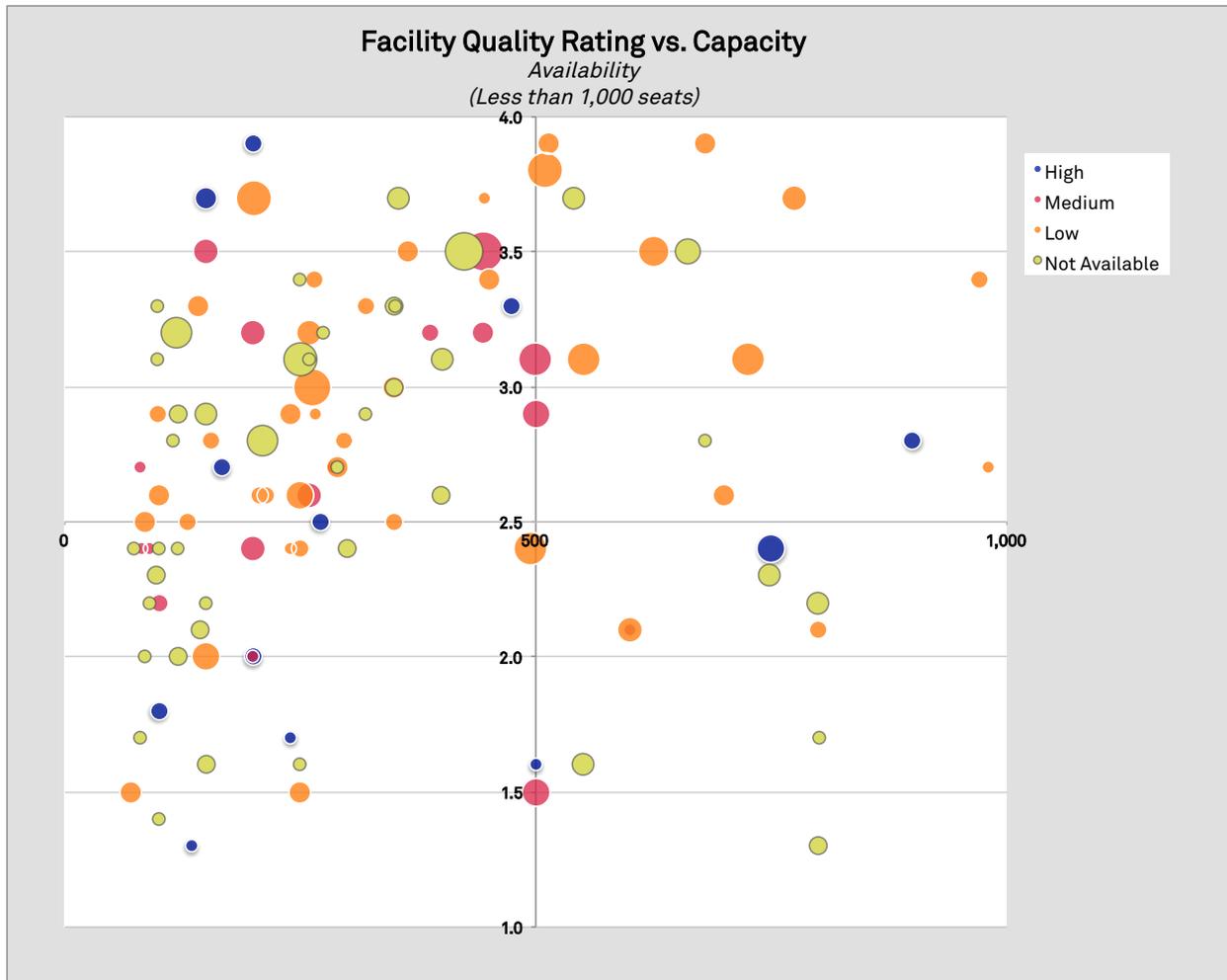
The charts above compare the features and amenities of facilities in Howard County with those in the region. For the most part, regional facilities are better equipped. The exceptions are in the categories of flexible seating, kitchen facilities, and dedicated parking.

Facility Capacity + Quality: The third of the appended charts shows capacity and quality, as previously described. This information allows us to visually present the inventory with a series of matrices. Each matrix shows the quality ranking on the vertical axis and the seating capacity on the horizontal axis. *The size of the circle is an indication of the number of program types supported by the facility.*

The first matrix, seen below, compares the quality and capacity of the County's facilities (the red dots) to regional facilities (blue dots). From this chart, we can see that, regionally, there are many more facilities than there are in the County, and that they are generally of larger capacity and higher quality.

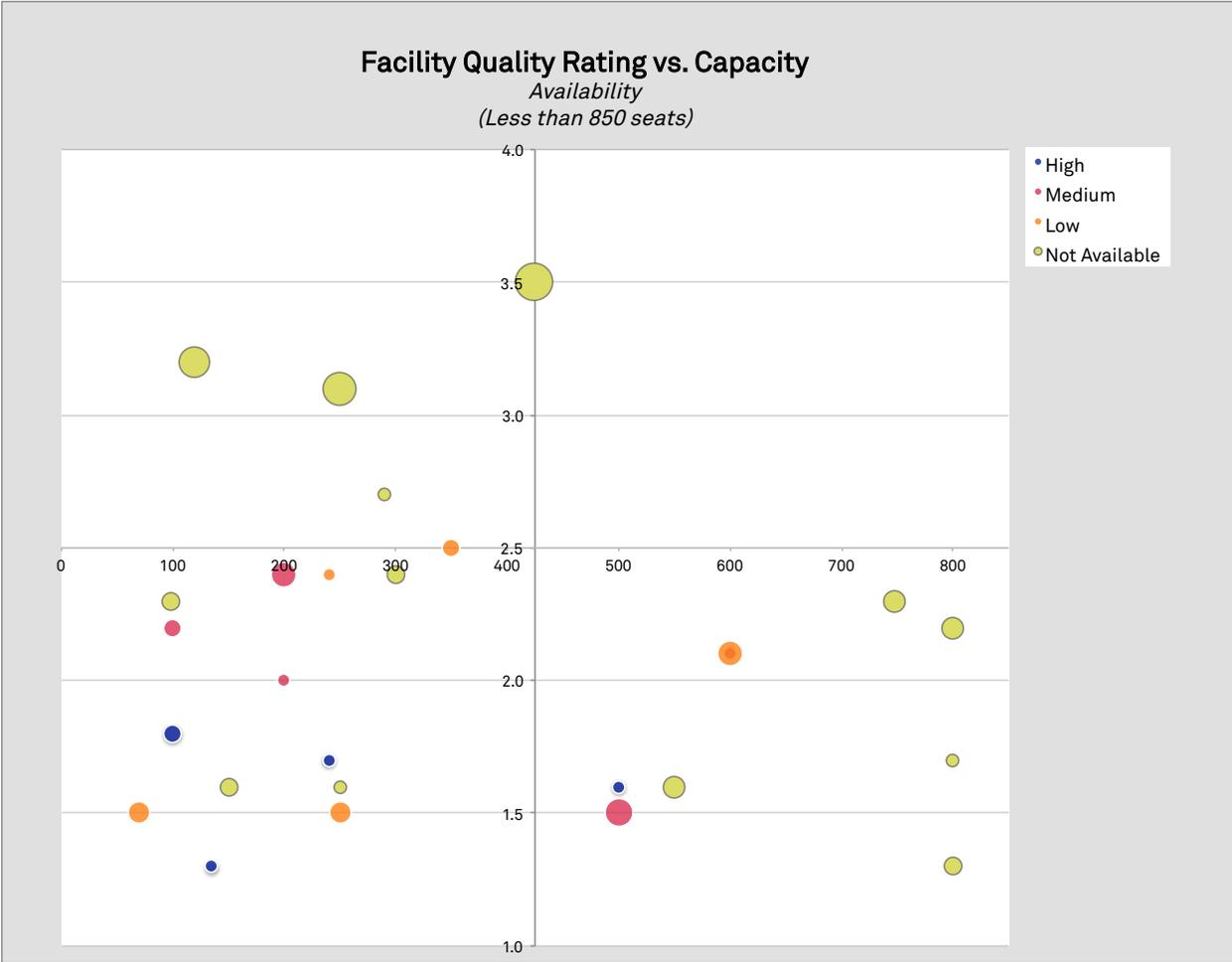


The next matrix compares the availability of facilities for outside rentals, looking specifically at facilities with capacities of 1,000 seats or less.

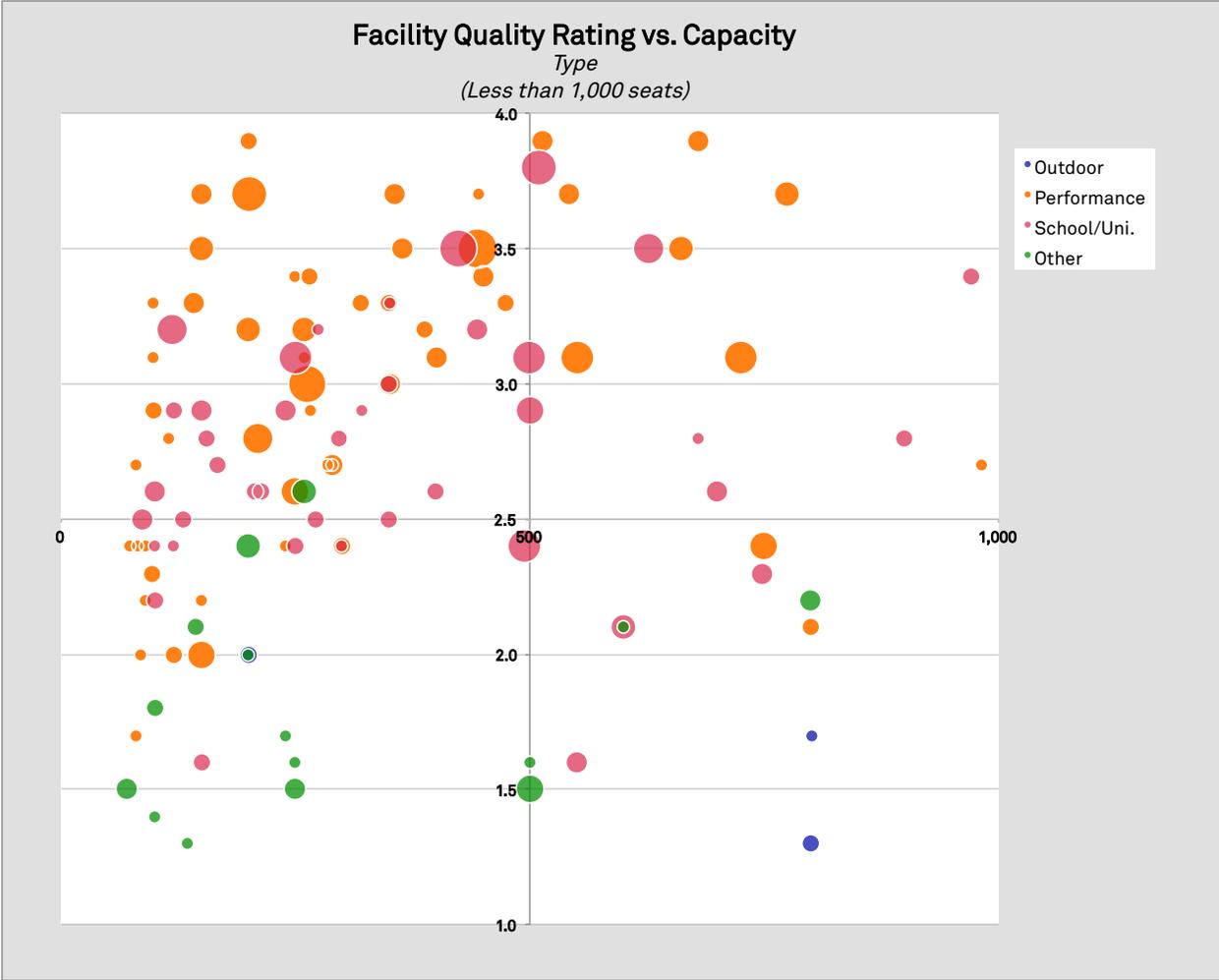


This shows that there are very few facilities with high availability (indicated by the blue dots) and a number of facilities with low (orange dots) or no (yellow dots) availability.

Research conducted for this study suggests high demand for cultural space, suggesting that existing facilities have limited availability. An additional chart below, which looks specifically at facilities in the County, supports these findings, showing that most facilities have low to no availability. In fact, the three facilities with the highest quality ratings—the Horowitz Center’s Smith Theatre, Monteabaro Recital Hall, and Studio Theatre—are not available for rent. (The Chrysalis Amphitheater is also highly rated but is not yet open. It will be available for rent once it comes online.)

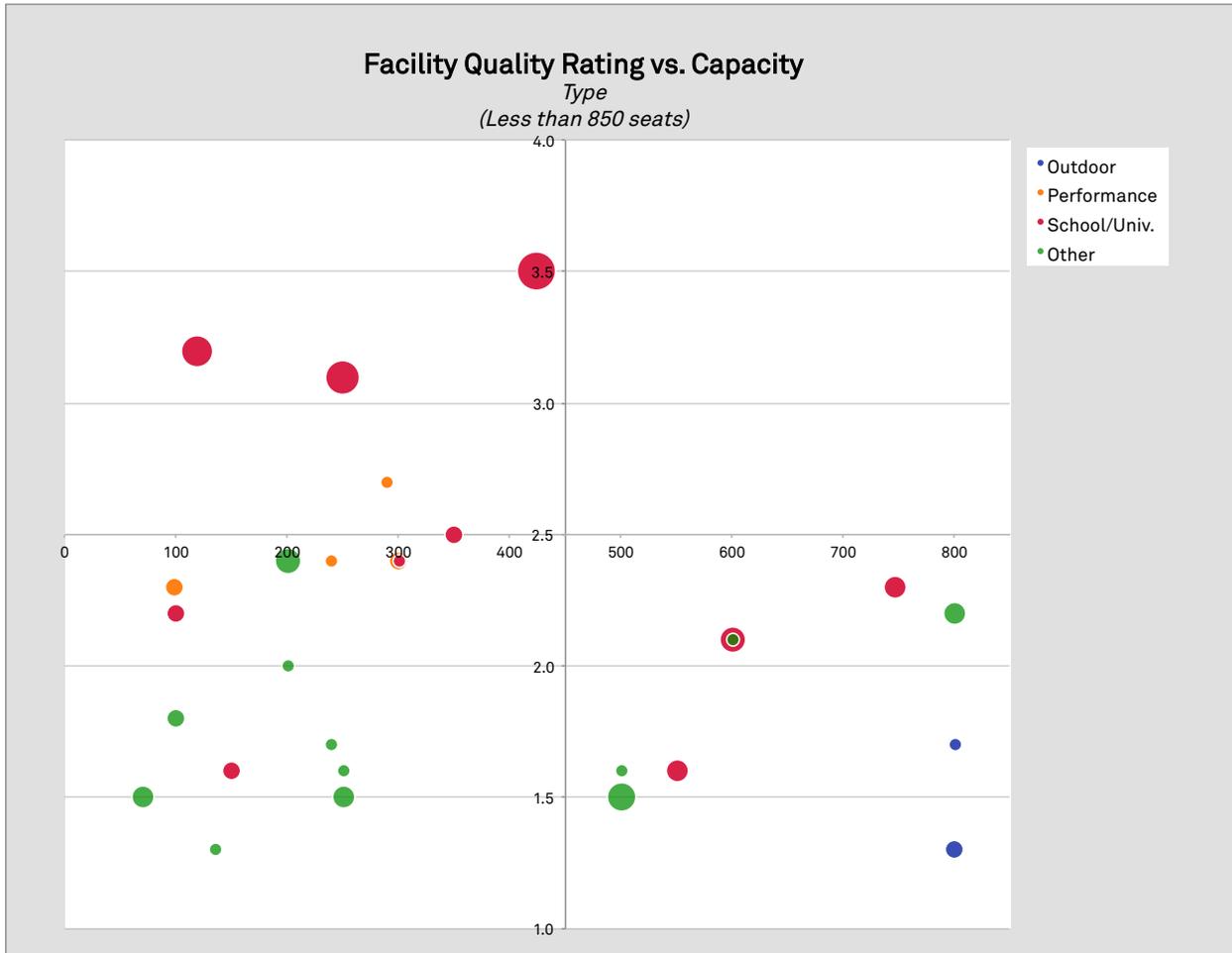


On the last matrix, the dot colors represent the type of space, comparing purpose-built performance facilities to those that are located in schools or that are outdoors.

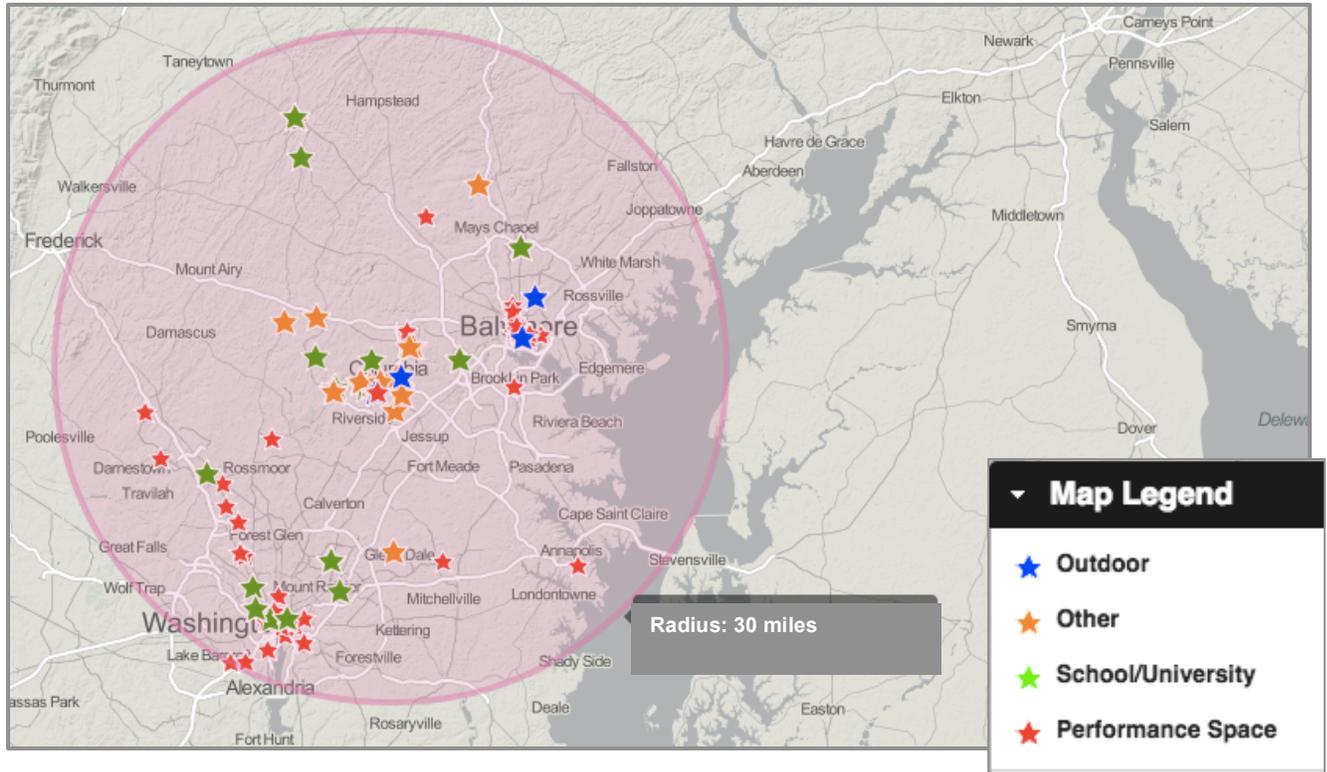


Looking first at regional facilities with less than 1,000 seats, we can see that the majority of facilities are purpose built or located in schools or universities. Between the two, 39 are school/university facilities, and 66 are purpose built. For the most part, these facilities are of high quality, while ‘other’ facilities tend to be of lower quality. Other facilities include churches, a fairground, recreation centers, and one dinner theater.

Looking more locally, the chart below emphasizes that most arts and culture facilities in Howard County are located in schools or were not purposely built for live performance. Of the true performance facilities, one is a music venue and one is not available for rent. The remaining two are black box theaters with low or no availability.



Finally, this map shows all of the facilities located within the 30-mile radius surrounding Columbia, indicating that Columbia has an important position between Baltimore and Washington DC but fewer true performance spaces. True performance spaces include the GenXaret Center, Toby's Dinner Theatre, Slayton House Theatre, and Howard County Arts Center's Black Box.



6.2 Visual Arts + Cultural Facilities

Howard County has a large community of visual artists that are eager for more space and opportunities to share their work. In looking at visual art and cultural facilities throughout the County, we conducted an exercise like the one described above. The results, included in Appendix D, suggest:

- * While there are approximately 19 facilities for displaying art in Howard County, most are not true exhibition spaces. Some are gallery-shops, some are walls or display cases for displaying art in public areas, and one is a custom framing shop with a gallery component.
- * Most feature paintings (90%), prints or drawings (75%), and photography (40%). To compare, only 10% showcase new media works, and only one-quarter show sculpture. Additionally, there is only one art museum in Howard County—the African Art Museum of Maryland. This facility primarily exhibits sculpture, textiles, and jewelry.

In terms of other cultural facilities, Howard County, and particularly Ellicott City, has an abundance of historic sites. These sites are generally historic buildings featuring cultural artifacts and/or

documents from the area's past. As most of these spaces are quite small, they offer little by way of programming or events, and generally do not have retail space, auditorium/lecture space, or meeting or classroom space.

6.3 Rehearsal + Program Space

Throughout Howard County, a multitude of spaces are used for rehearsals and arts education programming. An inventory of more than 200 spaces indicates that:

- * Howard County has an abundance of participatory dance, music, and visual arts programming, but very little theatre programming.
- * Howard Community College's Continuing Education and Workforce Development division and the Howard County Recreation and Parks Department are responsible for the majority of hands-on arts programming in Howard County. HCC's courses are geared towards adults, while Rec and Parks classes cater to both adults and children. For both entities, classes are primarily held in elementary, middle, or high school facilities, although HCC does use some campus buildings, as well.
- * Columbia Association Art Center, Columbia Center for Theatrical Arts, Howard County Arts Council and Slayton House also provide a wide range of hands-on arts programming that primarily serve their immediate communities.
- * Film/Media programming that is open to the general public is largely concentrated in the library system. However, some Howard County schools have media classrooms and include media as part of the curriculum.
- * The quality of dance and music programming in Howard County is very high—there are a number of pre-professional offerings in both categories. Conversely, very few pre-professional/training opportunities exist in theatre.
- * Program facilities vary in quality. Most are located in spaces that have been outfitted to accommodate the needs of dance, music, theatre, or the visual arts. The Horowitz Center, Robinson Nature Center, and Howard County Public Library's Savage and Miller branches have the highest quality ratings and are the newest facilities.
- * Program spaces are equipped at varying levels. Dance studios tend to be best equipped, having mirrors, barres, and dance floors. Music studios have a greater diversity of equipment: some facilities have only music stands, some have music stands and acoustic paneling, and others have music stands, acoustic paneling, mirrors, and sound and recording equipment.
- * Despite an abundance of dance programming, anecdotal research indicates that dance classes are full. One interviewee indicated that her daughter's studio is currently accommodating 56 two-year-olds. This also equates to demand for large-scale performance space, as dance schools have trouble finding adequate space for recitals and final performances within the County.

6.4 Summary of Existing Facilities

All of this research allows us to make the following conclusions about arts and cultural facilities in Howard County and the surrounding region:

- * Locally, there are gaps in the facility inventory for a high quality, small to mid-size performance space.
- * Regionally, there is an abundance of performance facilities covering a variety of capacities. Most of them have higher quality ratings than Howard County spaces.
- * There is a lot of producing occurring locally and regionally.
- * The type, size, features and availability of existing facilities are limiting the level and quality of touring activity visiting Columbia and Howard County. While there is a good level of music and family programming, there is opportunity to present more theatre, dance and culturally-specific performances.
- * Columbia's performance facilities tend to be better outfitted than those in the rest of the County. Compared to regional facilities, however, they lag behind.
- * Many of the current spaces used for performing arts events have low or no availability. This includes The Jim Rouse Theatre for Performing Arts, located on the campus of Wilde Lake High School, and the Elizabeth and Peter Horowitz Visual and Performing Arts Center, located on the campus of Howard Community College. These facilities are among the highest quality in the County. They were created to respond to County-wide space needs. However, as the community and demands from their own internal programming have grown, they have been unable to meet the needs of local arts groups. This has primarily been due to increased demand from school-based organizations and activities.
- * The majority of spaces used for performance were not built, nor are well-equipped, for live performance. They include galleries, churches, village centers, and parks.
- * There is limited gallery and exhibition space in the County.
- * The County has a wealth of historic resources, although nearly all of them have limited amenities and features.
- * Hands-on arts education programming is abundant in Howard County, although there are considerably more opportunities for dance and music education than there are for theatre, writing/literature, or other arts. Even with this abundance, however, research indicates a demand for additional programming. In conjunction with that, survey results indicate demand for additional programming space for both the visual and performing arts. Given their abundance and quality, arts education and hands on programs have potential to provide regional distinction.
- * There is limited maker/studio space for artists and creative entrepreneurs to work and create.

It is important to note that a number of performance facilities could be developed in the near-term, adding to the County facility inventory. Inner Arbor Trust is currently constructing a medium-sized amphitheater and planning to develop a complex on the edge of the MPP property that could include up to three mid-size flexible spaces for live performance. If MPP undertakes more extensive upgrades, those renovations are likely to include a black box performance space, which would place four new flexible performance spaces within close proximity to one another.

7. community benefits + impacts

Interviews with community leaders and a review of community planning documents also suggest that the arts and culture are recognized as key contributors to quality of life and community development. Following are notes related to the arts and culture and community goals, as noted in those documents.

Plan Howard 2030: Plan Howard 2030 was adopted in 2013 as an update to a 2000 General Plan for the County. It focuses on plans that respond to the environment, economy, and quality of life. The plan makes it clear that County recognizes that arts and culture contribute to quality of life along with economic development, education, and health and wellness. As such, the County provides significant funding to the Howard County Arts Council for re-granting, public programming and facilities. The Plan suggests that the County as a whole “should ensure County residents and visitors have access to a wide variety of arts and cultural programs and develop the creative workforce” by:

- * Maintaining the current model by which the County provides funding to HCAC.
- * Better connecting the arts with the Howard County Economic Development Authority, Howard County Tourism, and the private sector to increase arts awareness and develop creative funding streams for programs and facilities.
- * Exploring the feasibility of one or more arts and entertainment districts in the County.
- * Developing opportunities for independent artists to live, work, learn and present work.
- * Incorporating the arts in new development.

The plan also states that opportunities for cultural development should be explored within larger community planning efforts.

Downtown Columbia Plan: The Downtown Columbia Plan was adopted in 2010. It focuses on creating a unique community, building sense of place, improving transportation modes and systems, sustaining the environment, managing careful growth, and ensuring community participation. The arts and culture are key components of the plan, which highlights:

- * The redevelopment of Merriweather Post Pavilion and development of Symphony Woods to create a cultural park that becomes a destination in its own right but also connects to downtown Columbia, enhancing overall economic benefit.
- * Downtown development to include the creation of a number of spaces that can be utilized for live performance and public art. Symphony Overlook will connect The Mall to cultural uses in the Merriwather neighborhood and include outdoor space for live events and community activities.
- * The creation of the Downtown Columbia Arts and Culture Commission (already established), an independent non-profit organization to oversee cultural activity in Downtown. In the future, the Commission will develop a cultural master plan for the downtown area, exploring synergies with Merriweather Post, the Howard County Central Library, Howard Community College, and other existing facilities and new public spaces.

Long Reach Village Center Master Plan: Developed in 2012, the Long Reach Village Center Master Plan supports the reinvention of the Center for mixed uses, including an outdoor public gathering place, commercial entities that fulfill the needs of village residents, space for community use, and residential use (if appropriate to enhance other uses.) The plan is open to mixed-uses, but stresses that retail will be the most important component of the redevelopment of the village center.

The development of new arts and cultural facilities is certainly in line with goals, policies and plans reflected in the County master plan and downtown master plan. The Long Reach Village Center Master Plan does not directly identify cultural development as a priority, though it does note that community uses are important, as is leveraging existing community assets like the Columbia Arts Center.

8. preliminary findings

8.1 Conclusions on the Viability of New Arts Space

There is a case to develop new arts facilities in Howard County, given the following:

- * Based on national research on the characteristics of arts attenders, Howard County is a market that shows very strong propensity and capacity to participate in the arts. Target markets for arts programming and facilities include families, teens, empty-nesters, tourists and ethnically-specific populations. These populations are likely to respond to a diversity of hands-on, traditional, and non-traditional arts programming offered in formal and informal spaces.
- * There is remarkable demand for new and improved performing and visual arts facilities in Howard County on the part of a large number of arts organizations and individual artists. The most significant demand is for small performance space, mid-size performance space (in the range of 500 to 750 seats) and various sizes of exhibition space that can be shared by local artists and visual arts organizations. There is also demand for classroom and studio space that can accommodate rehearsal, teaching, and meeting activity, as well as meeting and event facilities to host special events and gatherings. Finally, there is some interest in shared production facilities (including shared studio, production and storage space) and shared services, particularly marketing and box office.
- * Existing facilities are limited in size, availability and function. The County includes several “work horse” facilities that accommodate a bulk of activity. These include Merriweather Post Pavilion, Howard County Center for the Arts, HCC Horowitz Visual and Performing Arts Center, Jim Rouse Theatre, Slayton House and Columbia Association Arts Center. All have significant limitations, particularly in terms of availability (excepting MPP.) There are also a number of facility projects in the works, which may include significant performance and rehearsal space. These projects all have potential to respond to the needs and opportunities identified in this study. It will be important for the County to be able to evaluate those projects based on the work presented in this report, in order to ultimately identify and respond to opportunities as they become more realistic.
- * The County is very focused on and supportive of cultural development, particularly in light of the redevelopment of Merriweather Post and the coming Symphony Woods project.

Leadership sees arts and culture as being critical to quality of life and the future of downtown Columbia and the County as a whole, particularly in terms of economic development, health and wellness and education. There is great potential for the arts to be well-integrated into downtown development plans. And, Long Reach Village Center could certainly benefit from expanded cultural activity and space.

8.2 Recommendations

These conclusions lead us to a series of recommendations for arts and cultural facilities in Downtown Columbia. They will be followed by recommendations for Long Reach Village Center.

Arts Education Center in Downtown Columbia

In Downtown Columbia, there is a big opportunity to develop a center for arts education that provides high quality facilities accessible to a set of local organizations with strong arts education programming. The concept provides a regionally unique amenity and attraction, serves key market segments, and responds to gaps in the facility inventory as well as demand issues.

Perhaps most importantly, this concept is appropriate for downtown Columbia because it has potential to contribute to the establishment of a downtown cultural district, complementing existing programming and spaces, building a concentration of activity and bringing foot traffic downtown 24/7 for a variety of hands-on, participatory arts offerings. This ‘around-the-clock’ activity has potential to be a positive influence on the development and vibrancy of downtown Columbia.

The complex should include a 250 to 300-seat high functioning flexible theatre and a more formal 500 to 750-seat theater as well as rehearsal, teaching, production, and administrative space. A portion of these production facilities could be dedicated to a group like Columbia Center for Theatrical Arts. Regional organizations with strong arts education programming should share additional rehearsal, teaching, and production space as well as the performance facilities. The large performance space may also accommodate a presenting program that brings touring artists to Columbia, but this idea should be weighted relative to programming plans for the Inner Arbor Trust complex at Symphony Woods. The facility should also host educational multi-cultural programming that reflects the cultures and backgrounds of regional populations.

We should note that this concept is somewhat reliant on the participation of a group like CCTA or another organization with a strong educational focus, which should be the anchor tenant. CCTA will bring an established brand and quality programming to the Center and will provide the majority of activity.

The following examples help to illustrate the recommended concept. The first is an example of a children’s theater and arts education facility. The second is a multi-tenant youth arts center which provides a home for organizations focused on arts education. The third is a facility that includes similar components, with a small theater, a mid-size theater, and ancillary spaces.

Children's Theatre Company, Minneapolis, MN

The Children's Theatre Company was founded in 1965 as a regional theatre in Minneapolis, producing plays for families and young audiences. In the 1970s, CTC developed its own 700-seat proscenium theater to serve as a home for its producing activities, many of which are inspired by classic children's literature.



Education and producing programs grew extensively over time so much so that for many years the organization operated as The Children's Theatre Company and School, first as an after school program and then as its own accredited grade school and high school. CTC's education programs remain large and strong, though the school has since closed. CTC's education programs are award winning and used as national models.

In 2005, a 45,000 square foot expansion added a flexible 300-seat theater, support space, administrative space and an arts education center which includes four classrooms, a student performance space, dance studio, teaching theater and lounge. Education facilities are rented to outside groups. All spaces are available for meeting/event rentals.

Milwaukee Youth Arts Center, Milwaukee, WI

In 2002, the Milwaukee Youth Symphony Orchestra and First Stage Children's Theatre formed a nonprofit organization with the goal of creating a home for rehearsal, administration, and performance. The Symphony and First Stage were previously housed in the Marcus Center for the Performing Arts, one of Milwaukee's premier performance facilities. However, both organizations were expanding their relative programs and required additional space. Following a \$12 million capital campaign (which included a \$1.5 million maintenance reserve), the Milwaukee Youth Arts Center (MYAC) opened in 2005. The building is owned and operated by its own nonprofit organization, which is governed by a 6-member board appointed from each tenant board, and jointly owned by the Symphony and First Stage. The operating agreement between the two organizations requires that both partners make up the difference in MYAC's operations when there is a deficit. The organizations frequently share expenses for purchasing office supplies and services.

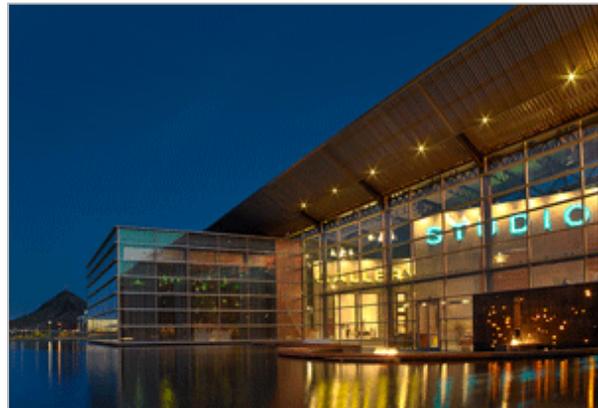


Located just outside of downtown Milwaukee, the MYAC has 86,000 square feet of useable space, although 56,000 square feet are currently dedicated programmatic space. The remaining 30,000 square feet are used for storage and will be developed as part of a Phase II expansion. The facility has five rehearsal halls, including a 3,800 square foot space that can also be used as a performance venue, administrative offices, a large lobby and public space, nine classrooms, and two small studio spaces which are used as practice rooms. MYAC also houses a costume shop, music library, and instrument storage.

The organizations housed at MYAC offer a variety of performing arts training programs. First Stage Children's Theatre offers one of the largest theater arts education programs for young people in the country. The Milwaukee Youth Symphony Orchestra provides comprehensive training in the techniques of orchestral and ensemble musicianship through an extensive program of rehearsals, performances, enrichment, and outreach activities to nearly 1,200 talented young musicians ages eight to eighteen. Danceworks strives to reach underserved populations by integrating dance and other art forms in collaborative projects involving artists, schools, and community agencies. Festival City Symphony visits schools with its "Let's Meet the Orchestra" program, providing children with an up-close and personal classical symphony orchestra experiences. African American Children's Theatre offers an ongoing after-school theatre training academy and showcases annual productions of standard and original musical theatre productions that explore culture and history. The Milwaukee Children's Choir provides its 400-member choir (ages 6 through 18) exceptional choral music instruction and performance opportunities.

Tempe Center for the Arts, Tempe, AZ

Completed in 2007, the Tempe Center for the Arts (TCA) resides on a beautiful 17-acre lakeside art park located near the southwest end of Tempe Town Lake. The 88,000 square foot center includes a 600-seat theater, a 235-seat studio, a large gallery space, a banquet/meeting room, a full-service box office, theatrical and administrative support areas, two dedicated catering areas, arts retail space, and a lounge. It is home to several theatre, dance and music ensembles.



The Studio is TCA's state-of-the-art flex space that can be configured in a flat floor, thrust, arena, end-stage, or cabaret design. It can also be fashioned as an art gallery. The Studio has two levels, including a balcony for seating, and catwalks situated over a network of complex rigging.

Owned and operated by the City of Tempe, total capital cost for the center was \$63 million for the Center and \$2.7 million for the adjacent art park.

The City of Tempe maintains and operates the building with annual operating costs of approximately \$2.3 million. The Center is funded in part by a .1% sales tax increase that supports a Performing Arts

Fund, which also receives revenues from rentals and admission fees. A partner non-profit, Friends of Tempe Center for the Arts, fundraises to sponsor programming and awards funds to community arts partners and volunteers at the Center.

Other Recommendations

We would also offer a few additional recommendations:

- * The County should support the development of new digital arts facilities and maker spaces (hands-on spaces for design and activity; the type of place one would go to learn about home bike repair, use a 3D printer, or build model airplanes) ideally in partnership with the Library. A review of existing facilities and programs revealed very few spaces for film and digital media exhibition and education. That gap, combined with trends in audience participation, which indicate rising interest and participation in music production, film production/editing, graphics, game development, digital photography and otherwise, suggests potential for the development of digital media programs and facilities. These facilities might include digital exhibition spaces, labs, editing bays, workshop and meeting rooms and recording booths. Following is an example of a similar program and facilities.

The Bubbler @ Central Public Library, Madison, WI

The recent expansion of the Central Public Library in Madison, WI resulted in a 50% increase in space as well as a significant arts focus. A new program, the “Bubbler,” is a platform that provides opportunities for artists and ‘makers’ to create and showcase their work. Programs include hands-on, pop-up workshops led by local artists, designers, and technology experts with sessions that range from beer brewing and creative writing to animation. Residents can access the schedule of events online.



The spaces include the Bubbler Room, where most of the events are hosted, as well as a media lab that provides hands on opportunities for residents to create digital art and a gallery with rotating exhibitions. The library also has an on-line program that encourages artists to self-publish work. Additionally, the library supports an artist in residence who uses part of the Bubbler Room as their studio during a multi-month residency to work on projects in the public setting. While based at Central Library, Madison's eight branch libraries host workshops and projects to engage the entire community. In addition to the Bubbler, the Library has a number of innovative programs that make the library a vibrant and inviting place. These include monthly Friday evening events with live music and artists.

The Bubbler received a \$25,000 NEA Our Town grant for 2013-14 and a matching pledge from the Madison Public Library Foundation. The capital costs for the entire library renovation

were close to \$30 million, with \$21 million coming from the City and \$9 million coming from the Madison Public Library Foundation.

- * The County and its partners should promote the development of additional small and informal performance spaces along with the development of new community arts facilities within other village centers, development projects, and areas of the County. This will ensure that cultural activity is spread throughout the community and that incubated and developing arts groups have spaces and places to grow into.
- * As the arts community grows and facilities are developed, it will be critical to continue to address the development of private sector giving. Howard County is one of the wealthiest counties in the United States but is purported to have the lowest giving base in the region. Private sector giving must be developed as the arts community grows. While the Community Foundation is certainly tackling this issue, we would suggest that it might also be addressed through a mentoring program in partnership with Columbia Association, the Community Foundation of Howard County, the County, and local corporations and arts organizations to identify and train a new set of funders. The program could be modeled after Leadership Howard County, Coro, or a local leadership development program, and should incorporate volunteerism at a high level to introduce the newer funding base to the organizations and help them feel connected to the mission and work of those groups.

Arts Production Facilities at Long Reach Village Center

A significant number of organizations have need for space to support the creative process, including administration, meetings, rehearsals, set production, and storage. As a result, we would suggest that the County work to redevelop and position Long Reach Village Center as a center that supports the development and creation of performing and visual arts activity. This concept responds to key supply and demand issues and also supports the development of a vibrant cultural sector that provides programming to Howard County, a goal expressed in multiple community planning documents. The concept is also envisioned to become a cultural tourist destination, where the public can see artists working and buy art.

Aside from providing a home to organizations, these spaces and the organizations that use them should also welcome the community into their facilities for workshops, classes, and to observe works in process, so that the facilities and their resident groups are well-integrated with their communities, providing new opportunities for interaction and arts education, and inspiring community and neighborhood development through the arts.

These facilities should include:

- * Artist work/sell/exhibit space, which should include a set of 10 or more artist studios (some with access to water), shared storage, exhibition space, retail space, a couple of shared administrative offices, and space where artists can gather for social and collaborative purposes. The facilities should allow the public to visit and watch artists working. If possible, it would also be beneficial for these spaces to connect to the Columbia Arts Center and somehow have access to the Center's kiln facilities.

- * Three studio spaces of varying sizes with sprung floors, pianos, and high ceiling height. Ideally, one of these spaces would also have some flexible or retractable seating and basic lighting capability to support workshops or informal performances as well as rehearsals and classes.
- * Two to four classroom/meeting spaces appropriate for hands-on teaching programs (wet and dry) and small meetings.
- * Shared administrative and production space, including shop, costume and shared but locked storage.

These facilities should be partially animated by an incubator program, as proposed by the Howard County Arts Council, that supports the development of individual artists and small arts organizations that are based in Howard County. The program should provide spaces that support the creative process and resources that provide administrative support to emerging artists and arts organizations that meet particular criteria and are members of the incubator for a fixed period of time.

These facilities would provide administrative and program incubator space for start-up arts groups and possibly emerging creative (arts-related) businesses. Facilities would include a combination of dedicated and shared space and services. Tenant organizations would receive affordable rent, important training (in areas such as fundraising, marketing and financial management) and benefit from working in a collaborative environment. They may also receive fiscal sponsorship, affordable benefits and shared services in areas such as finance and marketing. In exchange, they would be required to provide public programming within common facilities designed for that purpose. Participating organizations would only be permitted to stay within the incubator for a particular period of time in order to encourage additional start-ups.

This concept makes sense for Long Reach Village Center, as it is an existing building in a relatively isolated location. It is the right concept for LRVC because it focuses on creating affordable and unfinished space for arts organizations to create, collaborate, teach and develop in order to advance their work and education programs. The secondary (but still important) goal is to provide a place for artists and arts organizations to interact with the public and to provide an important amenity for nearby and local residents.

We have been asked to suggest what might be done with the former grocery store. Depending on space and access considerations, that facility may become a performing arts production facility, with shared spaces for rehearsal, teaching and production of theater, music and dance, while other areas in the Center become devoted to the visual arts. A space program will need to be developed in order to understand how these opportunities may be physically manifested within existing facilities.

The following examples illustrate the combination of facilities recommended here. One is dedicated to visual artists, another to a set of theatre organizations and the last to a combination of organizations.

ArtSpace, Raleigh, NC

With nationally acclaimed exhibitions, studio space, and hands-on visual arts education, ArtSpace serves as the center of the visual arts community in Raleigh, NC. It is a space of creation and interaction.



Established artists from around the country and emerging artists in North Carolina can gain access to studio space through the Regional Emerging Artist Residency Program and the Summer Artist Residency Program, meaning the building is always alive with artists creating work. ArtSpace also provides a number of artist services, including courses in technique and professional development seminars, public events, roundtables and critique for working artists.

Educating the public about art and artists is central to ArtSpace's mission. To this end they have education programs for grades 3-12 and adults. Their offerings include classes integrated with social studies curricula and extended classes for high school students planning to major in art, helping them create and curate a portfolio. To increase access the organization offers cost effective youth programs and a number of financial need-based scholarships. Additionally, ArtSpace hosts school groups, camps, art clubs, and other youth organizations, offering informal and formal tours of exhibitions, the building, and artists' studios.

ArtSpace participates in the local arts scene by hosting studio tours, both on and off-site, and participating in Raleigh's monthly First Friday Gallery Walk.

The facility includes 30 artist studios, three exhibition galleries, an education room, and a three-story lobby. These spaces are also available for rent for meetings, conferences, parties, and receptions.

ArtSpace is a non-profit organization that employs seven staff members and runs a summer internship program. The organizational structure includes executive positions (Executive Director, Director of Operations, Director of Development, Director of Programs and Exhibitions) and assistants for those departments.

Sammons Center, Dallas, TX

In 1981, proposals for the restoration and use of the historic Turtle Creek Pump Station were invited by the City of Dallas. Seven were submitted, both for commercial and nonprofit use. The Greater Dallas Youth Orchestra proposed joint occupancy and use by a coalition of nonprofit arts organizations. City



Council selected this proposal, and the City leased the building at generous terms to the coalition, now called the Sammons Center for the Arts.

The 19,000 square foot Center provides low-cost office, rehearsal, performance and meeting space, as well as administrative resources

through the Dallas Arts Resource System business incubator program. The Center is home to 15 arts organizations representing every discipline. In addition, more than 40 other arts and community organizations use its services and facilities for rehearsals, meetings, performances, and auditions. Additional services include a computer technology center with computer equipment and software programs.



The Center also hosts two performance series: Sammons Jazz and the Ethnic Arts and Culture Series. Sammons Jazz features local jazz artists in a relaxed, non-commercial setting at nominal ticket prices. Complimentary wine, beer, soft drinks, coffee, and light appetizers are included in the ticket price. The Ethnic Arts and Culture Series features small and emerging ethnic arts organizations, focusing on a specific ethnic culture at each showcase. The Center works closely with local groups (such as The Mexican Cultural Center, Dallas Black Chamber of Commerce, and the Asian Chamber of Commerce) to bring together corporate and business leaders to support these groups.

The Theatre Centre, Toronto, Canada

The Theatre Centre was founded in 1979 by a cooperative of five independent Toronto theater companies who wanted a space to create, rehearse and present new work. The Centre was incorporated as its own nonprofit entity in 1981. By 1984, the original five companies were no longer involved in the venture. The R+D (Research and Development) program was established and became the leading proponent for theatrical exploration in the city.



In 2004, R+D was replaced by a two-year Residency Program. This structured two-year program provides groups/artists with the necessary space, funding and mentorship to create new work and develop finished products that are both provocative and innovative. The program creates a highly collaborative process and environment that brings together a variety of participants, both artists and non-artists. The Centre also offers long-term partnership opportunities that allows itinerant companies to make the Centre their home for several seasons. Public programming includes residency showings, theatre festivals, rentals and unique productions.

The Centre has been housed in a number of facilities over the years. In the 2000s, the Centre was located in 2,600 square feet of The Great Hall, a 115-year old renovated building. The organization leased the space, but spent approximately \$250,000 to renovate the current theater, which has 125 seats. Also included in the building, but not related to the Centre, was a restaurant, banquet hall, conversation room, small studios and offices.

In 2014, the company moved into a new live arts hub and incubator at an historic Carnegie Library building following a \$6.2 million redevelopment of the heritage property. The facility includes a small scale performance space, lobby café, rehearsal hall, gallery space, green room, green terrace and administrative space.

The Theatre Centre is a nonprofit organization with a Board of Directors that oversees a General + Artistic Director. Additional staff include a General Manager, Director of Development + Partnerships, Director of Facilities + Production, Technical Director, Box Office + Front of House Manager and Manager of Artist + Community Activation.

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