
HERBERT SPROUSE CONSULTING

**A PLAN FOR
PORTLAND'S ARTS
DISTRICT**

Including Supplement I:
A Study of Portland's Arts Audience
and
Supplement II:
A Cultural Census of Portland

November, 1995

Prepared for the Arts and Cultural
Steering Committee

by
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**A PLAN FOR
PORTLAND'S ARTS DISTRICT
EXECUTIVE SUMMARY**

Prepared for:

The Portland Arts and Cultural Steering Committee

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A PLAN FOR PORTLAND'S ARTS DISTRICT

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PORTLAND COMMUNITY CHAMBER OF COMMERCE
DIVISION OF THE CHAMBER OF COMMERCE OF THE GREATER PORTLAND REGION

PLAN FOR PORTLAND'S ART DISTRICT EXECUTIVE SUMMARY

Prepared by
The Planning Division,
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I. INTRODUCTION

The *Downtown Vision Plan*, adopted in 1991, contains the following Policies for Portland's Arts and Cultural community:

- 1) Promote and enhance the cultural community by retaining and encouraging arts and cultural organizations;
- 2) Support the cultural community by retaining and expanding performance and exhibition space, housing, studio space, and office/support space for artists, institutions, and organizations.
- 3) Promote the Downtown as the local, statewide and northern New England center for arts and culture.
- 4) Enhance and promote accessibility to diverse arts and cultural opportunities for all segments of the community.

Many of these policies have been implemented through the specific actions recommended in the plan such as, hire a Cultural Liaison, establish an arts development program, renovate City Hall Auditorium, encourage private and/or non-profit sector support of the State Theater, promote a cultural corridor; and install public art through a percent for art program.

The **Plan for the Arts District** and the **Cultural Census** (Supplement II in the report) are Portland's latest efforts to implement the *Downtown Vision Plan*. In 1993, the City Manager appointed a Cultural Arts Steering Committee with the charge to advise him on how the City should support development of Portland's arts industry and to guide the planning process for Portland's emerging downtown arts district. These actions were taken in recognition of the importance of the arts, artists, cultural traditions, and cultural institutions to the economic health and development of Portland and the well being of its citizens.

II. DEVELOPMENT OF THE PLAN FOR PORTLAND'S ART DISTRICT AND THE CULTURAL CENSUS

The goal of the Arts and Cultural Steering Committee was to develop a plan that will promote the health, stability and growth of the city's arts organizations, artists, and cultural heritage. Phase I of the cultural planning process includes the **Market Survey** and the **Cultural Census**. This baseline information informs Phase II, the **Arts District Plan** and Phase III, the **Community-wide Cultural Plan** which will be developed in 1996. The planning process for the Arts District Plan was based on:

- a series of Focus Groups and Public Meetings for Arts District constituents with attendance of approximately 200 interested citizens,
- Individual Interviews with more than 85 individuals representing the varied interests in the Arts District,
- a statistically valid Market Survey of the general public and arts attendees in the greater Portland market area,
- a Cultural Census inventory of artists, arts and cultural organizations, facilities and their financial impacts.

III. KEY FINDINGS OF THE CULTURAL CENSUS

- The total direct impact of cultural spending in Portland is over **33 million dollars annually**, considerably higher than communities many times larger than Portland. This dollar figure is a conservative amount, since it is the actual cultural spending in Portland and it does not include any multipliers or estimates for secondary spending cycles.
- Arts and cultural organizations alone spend **21 million dollars annually**.
- Portland's cultural sector employs 340 employees with an annual **payroll in excess of \$9.8 million** and there are 1,800 volunteers who devote over 85,000 hours a year representing an additional aggregate impact of \$849,425.
- Artists expenditures amount to an additional **\$473,997 annually**.
- There are over **2,000 arts events annually**, of which more than half are free.
- The total annual audience of arts events is well over **900,000 people**.
- 96% of the audience for free events participate within the Arts District and 76% of the paid admissions occur within the Arts District.

[The details of the Cultural Census are presented at the end of the bound report as Supplement II. Please refer to pages S2-1 through S2-20. More cultural census information is available from the Planning Division.]

IV. KEY FINDINGS OF THE MARKET SURVEY

- 70% of the respondents agreed that *"Portland is a much better place to live because of the variety of arts activities going on here."*
- 75% of the respondents agreed that *"It's important for the City of Portland government to support artists and arts institutions more actively."*
- 83% agreed that *"Better promotion of Portland's cultural life could improve tourism in the area."*
- 50% of the Portland primary market area residents reported that they had attended a live performing arts or entertainment event (with a paid admission) in the past 12 months. 49% had attended a museum or art gallery during the same period.
- The average size of an attending party at arts and cultural activities is 3.1 people for the extended market area and 3.0 for primary market residents. Over 50% of the respondents reported that children accompany them to cultural events more than a third of the time.
- Portland residents felt considerably safer in their city than did respondents in other metropolitan cities. Only 26% gave safety as a concern compared with 36-47% in other cities.

[The Market Survey is presented in supplement I within the bound report, pages S1-1 through S1-B-3.]

V. GOALS FOR THE ART DISTRICT

- **Mission Statement:** The Arts District in Downtown Portland is a vital mixture of the arts, business and community involvement. Through excellent art and sophisticated business practices it serves the entire region. Every individual resident or visitor to Portland knows of its presence and has a reason to visit the Arts District. Because it exists, Portland's arts institutions are stronger, its artists are more prolific and its citizens enjoy a high quality urban environment unparalleled in the region. Successful development of the Arts District builds upon a partnership of endeavors to achieve a heightened street vitality, enhanced community life and commercial prosperity.

Seven Goals For Arts District Development

- **Improve the economic performance of arts institutions** in the Arts district and throughout the city.
- **Enhance the economic impact** of arts institutions in the city.
- Create a more **favorable business climate** in the District and in downtown Portland.
- **Support the creative efforts** of individual artists and **safeguard artists continuing presence** in the community.
- Contribute to the overall **quality of life** in the community.
- **Establish an Arts District** that is a permanent feature of downtown Portland.
- **To build community trust and collaboration** of broadly diverse groups as a way of fostering cross-cultural communication and understanding.

[These goals are contained in Chapter IV, pages IV-1 through IV-11.]

VI. KEY RECOMMENDATIONS FOR THE ARTS DISTRICT PLAN

The Physical District

- **Congress Square** is the heart of the Arts District, which will be firmly established through urban design, advertising and outdoor public events. The Arts District is defined with elasticity as the area along Congress Street encompassing City Hall auditorium to the east, Longfellow Square to the west, and the arts and cultural establishments nearby Congress Street. (See attached map.)
- The design of Arts District improvements should establish a **progression toward Congress Square** from all directions of approach.
- A positive urban design should be used to **establish the character and identity of the Arts District**. The design should establish a clear sense of the Arts District as a distinct section of the downtown, provide maximum support for the goals of the artistic institutions in the Arts District, and provide a pedestrian-oriented environment that is safe, comfortable and compelling.

- Physical and operational efforts in Portland's Downtown should **strengthen the pedestrian connections** between the Arts District and the Old Port. Business support and promotional activities should include joint efforts to establish the combined destinations as an attractive basis for visiting downtown Portland.
- Promotional efforts for the Art District should include detailed **information about parking availability** during the daytime and evening hours.
- The city should develop a **comprehensive parking plan for the Arts District Area** that addresses both the future needs of daytime Arts District use and evening patronage of the Arts District, within the context of the larger downtown parking supply.
- The City Council should adopt a specific policy that empowers city officials, working in concert with the Downtown Portland Corporation (DPC) to move rapidly to **take ownership of facilities and properties** in the Arts District **if they are deemed to be important to the development of the District** and may be lost for that purpose through private sale. The intent of city (or possible DPC) ownership of the property would be to hold the property only until such time as it can be transferred to private ownership for their best use in support of Arts District Development.

Arts District Sponsored Functions and Programs

- Portland needs a *Local Arts Agency* to support and develop the Arts District and the cultural life of the community. The Portland Arts and Cultural Alliance (PACA) is recommended to be designated as the arts organization to assume the responsibilities of the Local Arts Agency due to diverse membership and expertise in the arts industry.
- The city should transfer its current programs in support of the cultural resources of the community and the Arts District to PACA for administration. It should provide adequate funding to the agency to **continue and to expand the city's roles and involvement in the arts through the provision of those services under contracts with cultural institutions, organizations, and artists.**
- Over the longer term, PACA, as the Local Arts Agency, should work with other related entities to complete and implement three major items of strategic planning:
 - A **comprehensive urban design** plan for the Arts District,
 - A **formal marketing plan**, and
 - **Feasibility studies** for new facilities in the Arts District.
- For the near-term a small team of representative downtown individuals willing to commit themselves to this project, the **Arts District Interim Group (ADIG)**, to be appointed by the City Manager, should lead the Arts District initiatives until the development and direction of the Arts District can be transferred to PACA.
- The Arts District Interim Group, in collaboration with other city resources, should undertake five critical programs to initiate the Near-term Development Plan for the Arts District. They are:
 - Adopt a **Mission Statement** and endorse the Development Plan,
 - Continue and expand **outdoor events** in the Arts District,
 - Design and implement a **Rapid Start Exhibition Program** to increase the visibility of arts and to utilize empty storefronts or other underutilized properties in the Arts District,

- In conjunction with Portland's Downtown District (PDD), develop and coordinate a **Near-term Marketing Strategy** for the Arts District, and
- Participate in a **Near-term Physical Improvement Strategy**.

These initiatives should be addressed in a short-term detailed strategic action plan, to be completed as the Arts District Interim Group's first order of business within three months of its assembly.

Cultural Institutions Development and Support

- A **Marketing Strategy** should be developed for the Arts District, in partnership with other promotional efforts in the City, to convey a message of easy access between the Arts District and other downtown destinations and to prolong the length of stay of visitors, in order to experience the full range of Portland's offerings.
- A collaborative **audience development strategy** should be developed for Arts District institutions.

Business Development and Support

- Economic development strategies in the short-term and the long-term should **attract and support new businesses** complementary to the Arts District and focus on the market potentials represented by arts audiences.
- Explore opportunities for **joint marketing** and promotion between the organizations, cross promotions with businesses in the area and the **potential development of the tourist, visitor and seasonal market residents**.
- Identify and encourage new endeavors to utilize established programs for training, financial assistance and marketing to **support start-up businesses** in the Arts District.
- Recognize the appropriateness of **commercial entertainment operations** in the Arts District and seek to integrate them into all arts district initiatives.
- Undertake an assessment of the total **regulatory environment controlling the Arts District** to ascertain its impact on business location and residential/studio uses there. Modification to the regulations and their interpretation should be considered if they are found to be counterproductive for appropriate development in the Arts District.

Individual Artist's Concerns

- Pilot projects for **artist-owned housing and work spaces** should be developed.
- A longer-term plan for the development of artists' living and working space should be completed by PACA.
- Develop a program of training and assistance for the **business activities of artists**.
- PACA should assist in the development of formal **feasibility studies for proposed new facilities** in the Arts district, and should support the creation of new cultural facilities when justified.

Community-wide Cultural Activities

- The city, in partnership with PACA and the larger cultural community, should complete the ***Community Cultural Plan*** that started with components of the Arts District Planning Process.
- Complete a long range plan that encompasses its role as the agency designated to develop the Arts District.

[Please refer to Chapter III for the full presentation of these recommendations.]

VII. PROPOSED FUNDING FOR INITIATIVES

The plan emphasizes the need to coordinate and share resources to accomplish the objectives of the plan. The short-term and long-term initiatives recommend collaborations and joint endeavors that will build upon the strengths of the participants in the Arts District. The estimated budget is as follows:

Near-term (12-18 months)

	<u>City Contribution</u>	<u>Other Sources</u>
• Rapid Start Exhibition Program	\$ 10,000	
• Outdoor Events	26,000	\$ 44,000
• Artist Housing & other spaces	5,000	
• Community Cultural Plan	<u>15,000</u>	<u>45,000</u>
	\$ 56,000	\$ 89,000

There is an additional \$50,000 recommended for capital improvements in the Arts District that include improvements, such as the lighting, which are already funded, and other improvements for Congress Square Park, which have been requested as part of the City's Capital Improvement Program.

Long-term

	<u>City Contribution</u>	<u>Other Sources</u>
• Urban Design Plan	\$ 30,000	
• Outdoor Events	50,000	\$ 75,000
• Artistic Programming & Funding	100,000 *	
• Long-term Marketing	15,000	10- 20,000
• Audience Development Plan	15,000	10- 20,000
• Strategic Plan for PACA	<u>15,000</u>	<u>10- 25,000</u>
	\$225,000	\$105- 140,000

*The \$100,000 is given as a range for Arts District functions and programming and the final figures will depend upon the cost of other initiatives. The long-term plan calls for specific implementation initiatives surrounding marketing, audience development, and organizational tools for PACA, which are to be accomplished soon after PACA assumes the responsibilities of the city's local arts agency. Over time the proportion of city funds may be increasingly directed to the purchase of services, such as providing access to the Arts for under-served residents, and arts education programs. The order of magnitude of the City's contribution for the combination of Arts District programs and functions is envisioned to be in the range of \$200,000 annually.

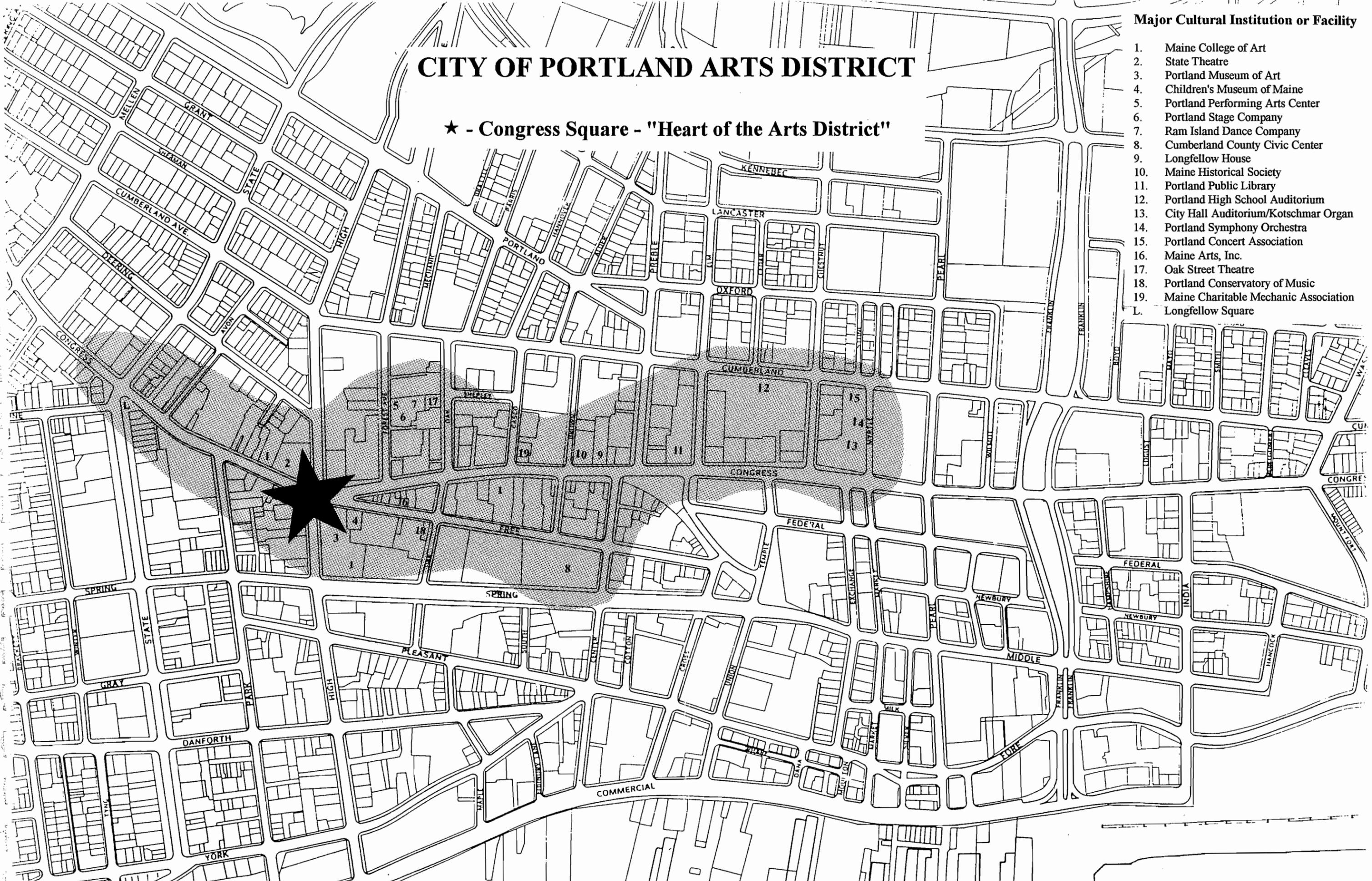
[The near-term plan is presented in chart form in Chapter V, and the long-term plan in Chapter VI.]

CITY OF PORTLAND ARTS DISTRICT

★ - Congress Square - "Heart of the Arts District"

Major Cultural Institution or Facility

1. Maine College of Art
2. State Theatre
3. Portland Museum of Art
4. Children's Museum of Maine
5. Portland Performing Arts Center
6. Portland Stage Company
7. Ram Island Dance Company
8. Cumberland County Civic Center
9. Longfellow House
10. Maine Historical Society
11. Portland Public Library
12. Portland High School Auditorium
13. City Hall Auditorium/Kotschmar Organ
14. Portland Symphony Orchestra
15. Portland Concert Association
16. Maine Arts, Inc.
17. Oak Street Theatre
18. Portland Conservatory of Music
19. Maine Charitable Mechanic Association
- L. Longfellow Square



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SECTION I. INTRODUCTION

In December of 1994 the City of Portland contracted with Herbert Sprouse Consulting and the Wolf Organization to create a development plan for the downtown arts district. The process of creating the arts district development plan involved several important components, including:

- Working sessions with the Arts and Cultural Steering Committee and its sub-committees, city staff and other public officials,
- A review of the wide range of previous studies, planning documents and other materials that examine the challenges facing downtown Portland,
- A series of public meetings with constituents of the arts district, which involved approximately two hundred interested citizens, and
- An extensive series of interviews with more than 85 individuals representing the many varied interests in the arts district and its development. A complete listing of the individuals interviewed is provided in Appendix A of this Report.

In addition, the consultants also undertook two specialized research components. The first was a statistically valid market

survey of both the general public and arts attenders in the Greater Portland market area, aimed at developing information on their attendance habits, cultural interests and opinions about a wide range of art-related questions.

The second research component was a "cultural census" inventory of artists and cultural organizations to gather baseline information about the nature and impact of cultural activities within and outside the arts district.

These two components were designed to provide valuable information for the arts district development plan as well as to inform the larger community-wide cultural planning process that the City intends to undertake in the future. While the community-wide effort is not part of this planning initiative, research conducted during this project will provide an important starting point for the larger cultural plan. The findings of the audience survey and the cultural census are provided as two separate Supplements to this Report.

The planning process has benefited from the hard work and attention of many people, including the Steering Committee, members of the Committee's four sub-committees, individuals interviewed for this project, and those who attended one or more of the public meetings held in conjunction with this project.

The Arts and Cultural Steering Committee is composed of active leaders of Portland's cultural community and representatives of city government. Meeting about once a month, the Steering Committee oversaw the work of the consultants, receiving updates on consultant findings, reviewing drafts of surveys and questionnaires, and discussing key issues and concerns. Four sub-committees were established by the Steering Committee to address specific areas of the project. They were:

Market Research - overseeing the market survey of arts attenders and the general public.

Public Involvement - developing the series of meetings held to provide opportunities for interested citizens to comment

on issues facing cultural organizations, artists, and businesses in the arts district.

Cultural Census - assembling the questionnaires used to gather census information from artists, cultural organizations, and cultural facilities.

Arts District - providing guidance and feedback on specific issues and concerns relating to the full range of participants in the arts district.

In coordination with the Public Involvement Subcommittee, the consultants conducted a series of five public meetings with constituents of the arts district. These meetings were extraordinarily well-attended compared to meetings conducted by the consultants in other communities, attracting over two hundred participants. Four of the meetings were organized by specific topic areas. Special meetings were held with:

- Artists living and working in the community,
- Representatives of cultural organizations and arts-related businesses,
- Business owners and operators in the arts district, and
- Social and education service providers.

The final meeting in the series was open to the entire community and served as a summary session for the earlier meetings. It provided an opportunity for the consultants to reflect on the many issues raised during previous sessions and to probe areas of consensus and continuing questions facing the arts district. The opinions and attitudes expressed during all of the sessions have played an important role in the development of this planning document. An additional meeting is planned to review the draft development plan as well.

ORGANIZATION OF THIS REPORT

The report that follows provides a detailed plan for development of Portland's downtown arts district. Following this Introduction,

Section II. The Current Situation provides a summary of the recent history of the Congress Street area, the many efforts that have been expended toward meeting its challenges and the birth of the arts district idea in Portland.

In *Section III. Analysis: The Key Issues*, the many issues facing the district are discussed and 26 recommendations are presented which provide an underpinning for the specifics of the development plan.

Section IV. Recommended Goals and Objectives for the Arts District presents those most basic ideas about the arts district, and goals for its future, that must become widely shared for the development plan to succeed.

Section V. The Near-term Plan: The Next Eighteen Months for the Arts District provides a set of development initiatives for rapidly advancing the process of development in the district, with specific recommendations for their management and funding.

Finally, in *Section VI. The Longer-term Plan: The Arts District Through 2005*, more complex, longer term initiatives are also recommended in detail.

ACKNOWLEDGMENTS

The consultants wish to thank all of those individuals who gave their time and ideas to this planning process through the interviews, public meetings and activities of the Steering Committee. In particular they wish to thank Kay Wagenknecht-Harte, the City of Portland's Cultural Liaison and Alex Jaegerman, Chief Planner, who managed the project for the City and staffed the Steering Committee. Additional thanks are due as well to

Steering Committee Co-Chairs Jane Hunter and Bill Chance for their leadership.

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Phyllis O'Neill Portland Performing Arts, Inc.
Anne Pringle Former Mayor and City Council
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SECTION II. THE CURRENT SITUATION

Portland is Maine's center for cultural institutions and activities, and it enjoys the largest concentration of both in northern New England. An extraordinary number of cultural institutions are located in the heart of downtown Portland and a series of new development initiatives from within the cultural community has greatly expanded the potential for this cultural center in recent years. In this Section of the Report, the consultants present the current situation in the arts district. That situation is both rich and complex, and what follows is, of necessity, highly summarized.

THE CONGRESS STREET CORRIDOR

The Congress Street corridor, the physical focus of this study, consists of Congress Street itself for the stretch reaching approximately from City Hall on the east through Longfellow Square to the west, encompassing roughly one block north and south of Congress Street through this stretch. This area of downtown Portland was the historic downtown retailing district. Its recent history parallels that of many U.S. downtowns, both large and small. Changes in the competitive environment for retailing, the regionalization of malls and the local and national economic cli-

mate have caused the flight or failure of many comparison goods retail operations in the corridor. The aging building stock has also slowly lost many of its office tenants due to changes in office use patterns and the limited ability of property owners to maintain and reinvest in their properties.

The result of this pattern of decline, by the early 1990's, was a very high rate of retail vacancy in the Congress Street corridor (estimated at 41 percent in November 1994) and a high upper story office space vacancy rate (although that vacancy rate has not been quantified.) Beyond the vacancy rate, many of the spaces that have been tenanted have attracted their users by very low rental rates which, in turn limit the ability of property owners to meet the costs of operating and maintaining the buildings.

Fortunately, the picture for the Congress Street corridor is not entirely without its positive side. Counterbalancing the economic stress of the area is a growing concentration of cultural institutions in this part of downtown Portland. The region's largest performing arts organizations and museums are located here, as is a significant population of artists working in all disciplines. This circumstance has lead the City of Portland and many other observers to consider the best means to capitalize upon this opportunity as a revitalizing force for the area.

For the purposes of the discussion that follows in the remainder of this Section of the Report, the terms "Congress Street corridor" and "the arts district" are used interchangeably.

THE DISTRICT'S CULTURAL RESOURCES

The rich cultural resources of the district include cultural institutions, facilities for use by those institutions and others, a vibrant population of individual artists and a number of arts-related businesses.

Major Resident Cultural Institutions

The extraordinary concentration of major arts institutions whose primary programs and venues are located in the district provides

a key to the identity of the area, as well as creating vital economic activity for the downtown. Data presented in Figure II.1 present the major cultural institutions and the summary figures describing their economic activity.

Figure II.1 Major Resident Cultural Institutions

Institution	Number of Employees (full time equiv.)	Total Annual Expenditures	Total Annual Attendance
Children's Museum of Maine	15.3	\$700,000	115,500
Maine College of Art	64.9	4.34 million	13,900
Maine Historical Society	9.5	390,000	25,000
Portland Ballet	6	200,000	17,500
Portland Concert Association	6	710,000	29,000
Portland Museum of Art	34	1.90 million	125,000
Portland Performing Arts	4	420,000	9,800
Portland Public Library	49	2.35 million	24,800
Portland Stage Company	8	1.07 million	31,000
Portland Symphony Orchestra	10	1.9 million	108,500
Totals	206.7 employees	\$13.98 million	500,000 attendees

Source: 1995 Cultural Census

The district's resident institutions are among the largest and most stable in the region. Employing a total of better than 207 people in the district, with annual expenditures of nearly 14 million and 500,000 in attendance annually, it is clear that their impact on both the Congress Street corridor and the downtown is very significant.

Arts Organizations Operating in the District

In addition to the resident major cultural organizations, a number of arts service, programming and funding organizations have

their operational headquarters in the arts district, although their activities generally serve a much broader geographic area and their actual venues for performances and service delivery may be elsewhere. Figure II.2 presents data describing these organizations.

Figure II.2 Arts Service and Programming Organizations Operating in the Arts District

Institution	Number of Employees (full time equiv.)	Total Annual Expenditures	Total Annual Attendance
Maine Alliance of Media Arts	1	\$25,000	300
Maine Arts, Inc.	3	406,000	37,500
Maine Artists' Space	1	97,000	5,200
Maine Composers' Forum	0	4,000	550
Oak Street Productions	1	69,000	2,500
SPIRAL Arts, Inc.	.5	32,600	1,400
Very Special Arts Maine	2	100,000	1,250
Totals	8.5 employees	\$733,600	48,700 attendees

Source: 1995 Cultural Census

An important point is that the presence of these organizations supports the role of the district as the central focus of cultural activity in the region.

Major Cultural Facilities in the District

The facilities operated or used by major institutions constitute an important regional resource, as well as providing a major attraction for residents and visitors alike. The major public venues in the district are described in Figure II.3 by data that were developed during the cultural census component of this project (and detailed in Supplement II to this Report.) Of these key venues, the Maine College of Art is currently preparing to

Figure II.3 Major Cultural Facilities Located in the Arts District

Facility	Ownership	Size/ capacity	Users
Children's Museum of Maine	non-profit	exhibition/ activity space	Children;s Museum pro- grams
City Hall Auditorium	public	2,340 seats under renova- tion	Portland Symphony, Portland Concert Association, Friends of the Kotzschmar Organ, others
Maine College of Art	non-profit	teaching facility	College of Art programs, exhibitions
Oak Street Theatre	private	90 seats	emerging, non-profit the- atre groups
Portland Museum of Art	non-profit	exhibition space, au- ditorium	Museum exhibitions and programs, auditorium available to others
Portland Performing Arts Center	private	291 seats	Portland Stage Company, Portland Performing Arts, others
Portland High School	public	1,200 seats	High school programs, Portland Ballet, others
State Theatre	private	900 seats	in-house presentations

Source: 1995 Cultural Census and consultant interviews

relocate to a major new facility in the district (see below) and City Hall Auditorium is undergoing extensive renovation.

Additional major facilities are owned and operated by the Maine Historical Society (including the historic Wadsworth Longfellow House) and the Portland Public Library (the main branch and administrative center.) The Cumberland County Civic Center, the region's largest indoor venue for sports events and arena-style entertainment is located near the southern boundary of the district.

The Presence of Artists in the District

A close observer of the district will notice many signs of the presence of artists and arts-related businesses in the area. Many of the upper floor spaces are occupied by artists' studios and living and working spaces. Although no census of the numbers of these artists exists, the Cultural Census conducted by the consultants as

a part of this project did record responses from well over 100 individual artists with direct interest in issues related to the future of the district. The role of artists in the future of the arts district was discussed at length during several meetings of the Steering Committee, and a public meeting of interested artists drew over 60 participants.

In addition to the working spaces of individual artists, a range of arts-related businesses are located in the district, including graphic design firms and other design businesses, artist supplies stores, art galleries, music stores and a major recording mastering studio.

Recent Cultural Initiatives in the District

One of the fortunate aspects of the timing of this study is the coincidence of several major initiatives involving new facilities and programming in the study area.

- *Maine College of Art* is investing more than \$10 million in the renovation and reuse of the former Porteous department store building. Once the flagship department store in downtown Portland, the building has been vacant for several years and its reuse marks a major symbolic event in the rebirth of the area. The facility will house the college's instructional programs as well as providing gallery space and at least one small auditorium. The college intends to retain the Baxter Library, site of much of its current activity, for future programs.
- As mentioned above, *City Hall Auditorium* is currently undergoing very substantial renovation aimed at improving its utility for artists, its acoustics and the physical comfort of audience members.
- While the *State Theatre* remains in private ownership, the current operators and programmers of the theatre have recently announced that they will reconstitute their activities under the umbrella of a new non-profit organization. Their intent is to expand the programming role of the facility in the district. The reintroduction of the State for this purpose in 1993, after many years of use of the facility as a

pornographic movie house, has already had a noticeable impact on business activity nearby and on public awareness of the area.

- The Children's Museum of Maine is currently in the final stages of assessing the feasibility of developing *a large format theatre* adjacent to their main facility in the district. If feasible, such a facility could have a substantial impact on attendance at the museum, and on total visitation to the district.
- The summer of 1995 marks the first major effort to provide extensive outdoor *programming in Congress Square*. Funded in part by the city, Maine Arts, Inc. is providing a wide variety of events throughout the summer including ethnic markets, professional and community-based performing arts events and visual arts exhibitions. In addition, both temporary and permanent changes to the Square are being instituted to provide better programming spaces and to assist in dissemination of information about events in the Square and throughout the city.
- Although slightly outside of the generally acknowledged boundaries of the Congress Street corridor, the *Calderwood Bakery Building* will come into the private ownership when it is vacated by the Maine College of Art. Current plans for the building include its renovation into artists studios, commercial gallery space, arts-related business space, a café and a small performance venue.
- Local artist Henry Wolyniec is providing leadership in the formation of a coalition of artists interested in developing *artist-owned living/working space* within the downtown.
- Finally, plans continue to be discussed at the state and local levels for creation of a state *arts "magnet" high school*, possibly to be located in Portland. Although the political future of this venture is unclear at the state level, the local members of the task force continue to investigate alternative approaches to the development of the program.

Summary: The District's Cultural Resources

As this highly summarized account indicates, the concentration of cultural institutions, facilities and activities within the Congress Street corridor presents a unique opportunity for the city. In the face of economic changes affecting the district, the many recent and new initiatives by the institutional and individual participants in the district are remarkable in that they point the way for an even greater opportunity to create an identity for the district that can attract residents and visitors to the district and the larger downtown.

THE BIRTH OF THE ARTS DISTRICT

The concept of the arts district, and the genesis of public interest in its development, were the direct product of a major planning initiative conducted by the City. This effort culminated in the creation of the Downtown Vision plan.

The Downtown Vision plan is a component of the Comprehensive Plan adopted by the City Council in March, 1991. It is formally described in a document entitled *Downtown Vision: A Celebration of Urban Living and a Plan for the Future of Portland – Maine's Center for Commerce and Culture*. The plan is an extensive document that investigates a wide range of social and economic factors that bear on the current situation in the downtown and identifies areas of future growth and development. Of particular interest to this study, the report examined the role of arts, culture and entertainment in the downtown as well as the contributions to be made by tourism, open space, and downtown management initiatives.

To date, the direct results of the Downtown Vision plan include:

- The creation of the city's cultural liaison position, creating the City's point person for liaison to the cultural community and for implementing city policies in this area,

- Establishment of a legal Improvement District (Portland's Downtown District) with responsibility for management operations including the physical environment, public safety, transportation and marketing,
- Creation of the Downtown Portland Corporation as a major participant in the revitalization and operations of the entire downtown area,
- Public investment in the renovation of City Hall Auditorium and some streetscape improvements, including approval for new lighting,
- Creation of the Public Arts Ordinance, the Percent for Art Program and the Public Art Committee, and
- Creation of the Cultural Corridor concept.

In addition, several recommendations of the Downtown Vision plan have had an impact on events in the arts district. They include:

- Encouragement for the re-establishment of the State Theater as an active presentation venue,
- Promotion of the placement of public art throughout the city, and
- Encouragement for creation of programs to promote, assist and encourage the creation of affordable living and working space for artists downtown and nearby.

A second round of investigation into issues related to the Congress Street corridor was conducted by the Congress Square Committee, a group formed by the Council following its approval of Capital Improvements Program allocations for downtown. The Committee's report, *Report of the Congress Square Park Committee*, was submitted to the Portland City Council in November, 1991. As a follow-up to the Committee report, Maine Arts, Inc. was commissioned to undertake a feasibility study of events programming and produced their January 1993 Congress Square Programming Proposal.

The Committee's charge was to investigate the problems and potentials of the Congress Square area, with an emphasis on improving the park to enhance the immediate area and all of downtown. Recommendations were primarily aimed at attracting people to the park through activities including a café, an information center, festivals, a farmer's market, push carts, evening concerts and a summer-long festival. The Maine Arts report noted that, while physical improvements and the programmed activities would go a considerable distance toward reaching the new goals for the park, there remained a number of management issues to be resolved if the implementation of the goals was to be successful. These Committee reports laid the groundwork for the first summer of arts programming by Maine Arts, Incorporated in 1995.

More recently, the Congress Street Advisory Committee was convened through the efforts of Portland's Downtown District and Mayor Richard Paulson to evaluate the actions that might be taken to improve the business climate in the Congress Street area between Monument and Longfellow Squares (which is the heart of the Cultural Corridor.) The Advisory Committee studied the real estate markets relating to the area, specifically with reference to retailing and office use and presented a number of findings in their document, *The Report of the Congress Street Advisory Committee* . For the purposes of this study, there were some important findings.

- The committee explicitly supported the development of the arts district as a new approach to attracting people to the Congress Street area and recommended that further public funding be made available to develop arts-related property use and programming.
- The Committee noted that Congress Street properties require assistance in meeting Americans With Disabilities Act access requirements, and that public investment in projects that generate traffic to the area would be appropriate.
- Convenient parking and improved traffic patterns were cited as needs for the area

- The actuality, or the perception, of a large number of “deinstitutionalized mental patients, loitering groups of youths in the 13 to 25 age group and abusers of drugs or alcohol” was cited as an impediment to developing pedestrian-oriented business in the area.
- Education and training for the current small retail and business tenants was recommended to improve their viability in the area.

Over the years, a number of additional planning efforts addressed concerns of the Congress Street area. Those that were reviewed by the consultants and which contributed to the findings of this Report include:

- *Parking Master Plan for Downtown Portland* (Cambridge Systematics/HMM Associates, 1988)
- *Final Report on the Formation of the Downtown Portland Corporation* (City of Portland, 1990)
- *Downtown Improvement District Study* (Downtown Improvement District Feasibility Study Committee, 1991)
- *Downtown Portland: Retail Market Analysis* (Market Decisions, Inc., 1992)
- *Housing Strategies for the '90's* (City of Portland, 1993)
- *Preliminary Summary of the 1992 Arts and Culture Survey* (City of Portland, 1993)

Current City Involvement in Arts and Cultural Programs

An important direct result of the many planning efforts and citizen's task forces that have addressed the Congress Street corridor and the arts district concept has been the city government's increasing awareness of cultural institutions and activities as a vital industry with the potential to address important economic and social needs of the city. In recognition of the importance of cul-

tural issues, direct city involvement in funding and programs has increased significantly. Current city initiatives in the arts district, and in the general area of cultural activities include:

- Creation of the Cultural Liaison position within the Department of City Planning, and the devotion of additional planning staff time to arts district and downtown issues,
- Publication of the "Arts Alive Calendar," the area's major consolidated arts calendar, using city staff and resources,
- Management and operation of City Hall Auditorium, and the major investments in its renovation that are now underway,
- Institution of the Percent for Art ordinance and program, administered by city staff,
- Investment in physical improvements to Congress Square totaling \$110,000,
- Support of PDD's programs, including colorful street banners on Congress Street highlighting district attractions,
- Investment in more attractive and effective pedestrian lighting for the Congress Street corridor (\$200,000),
- Financial support (\$25,000 per year), and selection of the programming provider for the first summer's programming in Congress Square,
- Loan funding to assist the Maine College of Art's renovation of the Porteous Building and the relocation of the Children's Museum of Maine to Free Street, and
- Funding and staff involvement for the development of this Arts District Plan with its associated components, the Cultural Census and the Survey of Portland's Arts Audience.

An important issue is the city's continued interest and effectiveness in supporting the provision of cultural programs and services. In many cities, this type of direct involvement by the city, while extensive and important, is considered a transitional phase. The longer term goal is to place responsibility for many of these types of programs and initiatives into the hands of agencies and organizations that are specifically designed to execute these types of programs. This issue is discussed more extensively in Section III of this Report.

Key Agencies Involved in the Arts District Area

A very important feature of both public and private interest in Portland's downtown is the large number of quasi-public and private organizations that have sprung up to deal with various perceived needs and opportunities. The key agencies involved in programs affecting the district are:

- *Portland's Downtown District* is a non-profit organization formally founded as the Downtown Improvement District Corporation in 1992. Funded through property tax surcharges levied in a specified improvement district, the PDD provides asset management and promotional services to the downtown area and endeavors to provide coordination and information brokerage among the many players in the downtown area.
- *The Downtown Portland Corporation* is a quasi-governmental economic development group with responsibility for developing the Downtown Business District with a primary focus on Congress Street. It provides financing, business development and recruiting, promotion and marketing and management services.
- *The Downtown Arts District Association (DADA)* is a coalition of arts district businesses that has formed to promote the district and its businesses. Their initial project, a colorful guide to the district, rapidly exhausted an initial 50,000 print run and has generated substantial interest from tour operators and the hospitality industry.

- The *Chamber of Commerce of the Greater Portland Area* is a classic Chamber of Commerce providing business information, promotion and recruitment programs.
- The *Convention and Visitor's Bureau* operates a walk-in information center on Commercial Street (well outside of the district), performs a variety of visitor marketing services and, starting in 1995, provides informational services at the Congress Square kiosk.
- *Departments of city government* actively involved in the revitalization of the downtown, including the arts district include the the Planning and Community Development Department, divisions of the Department of Planning and Urban Development, and the Economic Development Department.

Additionally, the Portland Arts and Cultural Alliance (PACA) has been in existence for ten years as an arts service organization with a major focus on the institutions and facilities located in the district. The future role for this organization is discussed in considerable detail in Section III of this Report.

Public Perception of the Arts District

The public's perception of the current state of the downtown business district, and its awareness of the arts district were frequently raised issues in the interviews and the public meetings held during this project. Commonly held views among the institutional and business participants in the district include:

- The perception that the concept and the geography of the district are not well established in the public mind,
- The contention that the public views the downtown as inconvenient to get to and difficult to park in, and
- The belief that the general public perceives the Congress Street area as dangerous at night.

The "Survey of Portland's Arts Audience," presented as Supplement I to this Report, was designed by the consultants to develop some reliable information on questions of this kind. Readers are directed to the Supplement for a detailed discussion of the findings of the survey. Generally, the survey confirmed some of the arts district participants' perceptions while contradicting others.

- Survey results confirm that the arts district (or, alternatively the Cultural Corridor) is not well known to most residents of the arts market area. Even among those who recognized the name of the district, there was a very limited ability to name any resident institutions or events held there.
- While the general convenience of arts district venues is not a major problem, parking is perceived as a significant factor hindering attendance.
- Most survey respondents are not concerned with safety in the arts district, and the proportion of those who are is considerably lower than in other metropolitan areas surveyed by the consultants.

Strategically, it appears that public opinion about the arts district is relatively unformed and, therefore, subject to positive influence through well conceived and executed promotional campaigns.

SUMMARY: RECOGNIZING OPPORTUNITY

This Section of the Report has presented a broad array of factors describing the current situation in the arts district. It is clear that many problems have plagued the area, but there also are considerable interest and will to improve the physical and economic environment of the Congress Street corridor. The factors that present positive opportunities for development and change in the district are summarized below.

- An extraordinary concentration of major cultural institutions and important cultural venues exists within the district.

- A number of important new initiatives by cultural institutions in the district will increase the total presence and availability of arts programs there.
- The significant presence of artists working in the district is a valuable asset.
- The City of Portland has shown increased appreciation for the economic and social importance of cultural activities in general and, more specifically, in the district.
- Considerable effort and resources have been expended to diagnose and plan responses to the challenges facing the downtown and the district.
- A number of agencies and organizations are actively engaged in efforts to revitalize downtown Portland and the Congress Street corridor.
- Recent investment has been made, and will continue to be made in improvements to the streetscape and visitor comfort in the district.
- Public opinion is relatively unformed about the district and its attributes.

These, then, are some of the opportunities that supporters of the arts district may capitalize upon as they seek to improve the district. In the Sections of this Report which follow, a plan is developed that uses these opportunities as important starting points to create a vital and successful arts district in downtown Portland.

SECTION III. ANALYSIS: THE KEY ISSUES

In this Section of the Report, the consultants provide analysis of the key issues that the plan for Portland's Arts District must consider. Recommendations are made for approaches to addressing the issues. Those recommendations are then developed into specific goals for the Arts District and elements of the development plan in Section IV: Goals and Policies for the Arts District, Section V: The Near-term Plan and Section VI: The Longer-term Plan.

The analyses in this section are a direct result of the fact finding portion of the project. Interviews, public meetings and previous studies of the situation facing Congress Street and the downtown have consistently revealed a set of challenges that are key to re-defining and revitalizing the area. Many of those interviewed suggested specific approaches to meeting these challenges, and various sessions of the Steering Committee were focused on detailed discussions of these issues.

This Section of the Report also introduces an organizational scheme for the development plan itself. The issues posed by the Arts District's current situation are organized into six subject areas.

The Physical District considers the means required to establish the identity of the Arts District as a distinct part of downtown Portland and the physical changes required to support the area's revitalization.

Arts District Development, Functions and Programs examines the requirements for managing the development of the Arts District and its ongoing operations and programs.

Cultural Institution Development and Support details those issues that affect the cultural institutions located within the Arts District.

Business Development and Support provides analysis and recommendations for ways in which Arts District development can assist in the attraction and development of businesses in the area.

Artists' Concerns discusses the role of the individual artist in the future of the Arts District.

Community-wide Cultural Activities examines the issues raised by the development of the Arts District for the larger cultural community in Portland.

These six topical areas are then used to organize and describe the various specific elements of the Near-term Plan provided in Section V of this Report and the Longer-term Plan presented in Section VI.

One fact that will become immediately apparent is that nearly all of the issues facing the Arts District are highly interrelated. This poses a continuing challenge for everyone involved in the development of the Arts District. So, in effect, the organization of the discussions below only serves to heighten the fact that the issues cross over the many boundaries of the interests and concerns of each participant in the Arts District.

THE PHYSICAL DISTRICT

Issue: The Geographic Definition of the District

Interviews and group meetings to discuss the precise geography of the Arts District have elicited a number of responses. On the one hand, there is a need to delineate a clearly definable, imageable area. Distinct borders and strong indicators of entrance (such as large signs, gateways, abrupt changes in the streetscape, etc.) are often used for this purpose.

On the other hand, there is a realistic need to strike a balance between "hard" boundaries for the Arts District and inclusiveness for artists and institutions that are not located within the exact district boundaries.

Fortunately, in this situation a middle ground is possible – one that flows naturally from the concentration of institutions and outdoor programming at Congress Square. The Arts District may be broadly defined in approximate accordance with the earlier definition of the Cultural Corridor, while it may be developed to emphasize the Congress Square area, thereby avoiding the need for hard, defining borders.

Recommendation III.1: *The "Heart" of the Arts District is Congress Square, which should be firmly established through urban design, advertising and public events. Portland's Arts District should be "elastically" defined as the area along Congress Street encompassing City Hall Auditorium to the east, Longfellow Square to the west, and the arts and entertainment establishments nearby Congress Street.*

The concept is that activity in the Arts District will be perceived to radiate outward from this center, which would appropriately include such amenities as an information and ticket kiosk (most likely a permanent version of the kiosk erected for the first full summer of programming this year) and signage directing visitors to the institutions, performance venues, eating and drinking and shopping opportunities in the Arts District.

Recommendation III.2: The design of Arts District improvements should establish a progression toward Congress Square from all directions of approach. With the Square as the central point of arrival in the Arts District, it is not necessary to establish hard boundaries to the area.

This approach allows for an experience of arrival in the Arts District while allowing for the inclusion of businesses, arts organizations and other participants in programs and publicity, even if they are (or will in the future be) located beyond the generally established Arts District boundaries.

Issue: Establishing the Identity of the Arts District

Perhaps no issue is more illustrative of the interrelated nature of the challenges facing the Arts District than that of creating a public identity. As discussed in Section II, the Arts District is not yet well identified in the public mind. Even among the businesses and institutions active there, no widely shared understanding of the purposes, boundaries and intent of the Arts District exists. There are several reasons why this is so.

- There is no central organization with a primary responsibility for advocating, promoting and producing events in the Arts District.
- With the exception of the events held outdoors at Congress Square and the programs sometimes provided at Monument Square, arts activities in the Arts District generally happen indoors. Few buildings showcase art, artists or arts-related activity at street level.
- The long, linear nature of the Congress Street corridor, with extensive stretches of little or no visible cultural activity or facilities, prevents the existing signage from establishing a sense of arrival in the Arts District.

- The diverse building types and a lack of distinctive, unifying features in the urban landscape fail to provide the visitor with a visual recognition that they are in a distinctive place. This can be contrasted sharply with the Old Port with its consistent architectural style and scale.
- Finally, no formal definition or mission statement for the Arts District has ever been widely disseminated.

Many of the elements of the development plan for the Arts District are intended to address these issues. One very important approach to clarifying the physical definition of the Arts District is through the redesign of the urban fabric of the area.

Recommendation III.3: A positive urban design should be used to establish the character and identity of the Arts District. The design should establish a clear sense of the Arts District as a distinct section of the downtown, provide maximum support for the goals of the artistic institutions in the Arts District, and provide a pedestrian-oriented environment that is safe, comfortable and compelling.

The palette of the urban designer consists of a wide variety of approaches to creating a sense of place. Ranging from paving materials and street furniture, through signage regulation, historic preservation and public art, the designer seeks to create visual cues and subliminal messages that make a place identifiable, distinctive and, of course, attractive to the visitor.

An orientation to the comfort and safety of pedestrians is critical because of the existing situation in the Arts District. The audience survey discussed in Section II of this Report (and presented in detail in Supplement I) revealed that personal safety was *not* a major factor determining attendance at events and institutions downtown. However, the Congress Street Advisory Committee indicated in their report (also discussed in Section II) that the highly visible presence of “deinstitutionalized mental patients, loitering groups of youths...and abusers of drugs or alcohol” was having a chilling effect on pedestrian activity and business in-

vestment in the area. In the numerous interviews and meetings held to gather information for this project, the consensus emerged (and the consultants concur) that the real problem is the visibility of these groups on the streets, which is so apparent because the total pedestrian population is very low. By implication, raising the total numbers of pedestrians on the street will reduce the level of discomfort for all.

Physical comfort is also lacking along the Congress Street corridor as well, with few outdoor places to sit, little shade, and very little relief from traffic noise. Changes under way in Congress Square for the summer of 1995 promise some improvement in that area, but pedestrian amenities near Monument Square have reportedly been removed in an effort to cope with loiterers there. As the Arts District develops and the total level of pedestrian activity rises, replacement and improvement of these pedestrian comfort amenities will be appropriate and necessary.

The additional challenge to the urban designer in this instance will be to address the issues contained throughout the discussion of the physical Arts District.

Issue: The Arts District, Old Port and the Larger Downtown Area

One recurring theme in the interviews and group sessions was the importance of avoiding the possible negative result of further fragmenting downtown Portland into a series of unrelated, uncoordinated sub areas. Development of the Arts District was seen as having the potential to disrupt existing efforts to promote the downtown to visitors. Some merchants in the Old Port were particularly concerned that their hard-won presence in the regional market would be lost as a result of publicly-funded efforts to establish the Arts District.

In fact, the proximity of the Old Port to the Congress Street corridor and the ease of pedestrian passage from one to the other (either via Monument Square or along Free Street to Congress Square) is an important, under appreciated asset for the Arts District, and a future source of opportunity for the Old Port as well. In part, the advantages of this adjacency are unrealized because the Arts District and Congress Square are not yet strong

enough attractors for pedestrians now visiting the Old Port. A second factor, however, is that the physical environment is not designed to assist in discovering the pathways between the two areas. This situation can be addressed through signage, changes in other visual cues such as pavers, sign standards and lighting standards, the strategic attraction of interesting businesses along the route and through the distribution of promotional materials that emphasize the attractiveness of combined visits to the two locations. These combined visits also carry the potential to increase the total length of stay for visitors in the downtown area, an important objective where the goal is to increase visitor spending for food and beverages, retail goods and, in the longer term, for lodging as well.

Recommendation III.4: Physical and operational efforts in Portland's Downtown should strengthen the pedestrian connections between the Arts District and the Old Port. Business support and promotional activities should include joint efforts to establish the combined destinations as an attractive basis for visiting downtown Portland.

Portland is a city with multiple attractions. It is important to establish the Arts District's identity in the public mind, to convey a message of easy access between the Arts District, Old Port, and other downtown destination, and to prolong the length of stay of visitors in order to experience the full range of Portland's offerings. And as will be discussed below, the significant potentials for capturing audience spending and for extending the length of stay provide real incentives for all downtown businesses to assist in the establishment of the Arts District.

Issue: Parking in the Arts District

Almost without exception, discussions about the Arts District turned to parking as a topic. Perceptions about the adequacy of the parking supply vary, however. Generally, business people in the district feel that parking is inadequate and inconvenient for their customers while the managers of the resident arts institutions and facilities report satisfaction on the part of their audience

members. Responses to the Cultural Census indicate that the staff of resident arts organizations do not experience parking problems. Findings of the audience survey indicate that parking is a negative factor for better than 60 percent of current attenders. The Congress Street Advisory Committee also cited the need for more convenient parking for the area.

Interestingly, Cambridge Systematics' study of the downtown parking supply (1988) indicated that, for the entire downtown, the parking issues related more to the high proportion of reserved spaces (with low utilization rates) and the high mid-day occupancy of un-reserved spaces than to a shortage of parking spaces overall. Monument Square and Congress Square were two areas cited that were developing daytime parking shortages at that time. No new parking structures were recommended for the short term and changes in parking management schemes were recommended as the primary approach to developing better parking access and convenience for retail and business customers. Many of the recommended changes have apparently been undertaken.

The parking situation, therefore, contains some contradictory elements. It is very possible that visitors to the downtown in the evening hours generalize about parking problems that they have experienced during the more congested daytime hours. In addition, since none of the available parking is very visible from the Congress Square area of the Arts District, it is possible that available spaces are going unused. Most important, however, is that the Cambridge Systematics study is now somewhat dated and may not represent the current situation.

Clearly, a detailed study of downtown parking conditions is beyond the scope of this assignment, and future decisions about parking for the Arts District must rely on better data than are currently available. Therefore, the best course available in the near-term is to make every effort to provide patrons of the Arts District with good information about parking availability, whether during the daytime or the evening hours.

Recommendation III.5: Promotional efforts for the Arts District should include detailed information about parking availability during the daytime and evening hours, in order to overcome perceived and real problems of parking in the area.

Beyond the near-term, formal studies of the available parking supply and the future needs of the Arts District must be commissioned in order to plan for the Arts District's needs.

Recommendation III.6: The city should develop a comprehensive parking plan for the Arts District area that addresses both the future needs of daytime Arts District use and evening patronage of the Arts District, within the context of the larger downtown parking supply.

Issue: Safeguarding the Resources

A final issue regarding the physical attributes of the Arts District is the necessity of providing safeguards for the cultural resources of the area. In order to attract investment over time, the commitment must be made to create a permanent Arts District, not merely a transitional use of the area. Because the cultural institutions and facilities in the Arts District are the key to its identity, their presence in the District must be safeguarded.

Most of the institutional facilities in the Arts District are either under private, nonprofit ownership (for example, the Portland Museum of Art and the Maine College of Art) or public ownership (e.g. City Hall Auditorium and the Portland Public Library.) Short of the failure of these institutions (which investment in the Arts District is intended to help prevent) the facilities can be expected to remain in their current use.

However, two important facilities, the Portland Performing Arts Center and the State Theatre are both in private hands. Also, it is very possible that in the future, other private properties will be identified as potential development opportunities for cultural in-

stitutions, new facilities or special business opportunities. The most important occurrence to prevent is the loss of existing facilities or exceptional new opportunities through an inability to react quickly and definitively if a key property suddenly is put up for sale.

***Recommendation III.7:** The City Council should adopt a specific policy that empowers city officials, working in concert with the Downtown Portland Corporation (DPC), to move rapidly to take ownership of facilities and properties in the Arts District if they are deemed to be important to the development of the District and may be lost for that purpose through private sale. The intent of city (or possible DPC) ownership of the property would be to hold the property only until such time as it can be transferred to private ownership for their best use in support of Arts District development. The Departments of Planning and Economic Development, working with the DPC and the city's Local Arts Agency should maintain a list of key properties against the possible need to intervene.*

Unlike some other Arts District situations, preserving specific opportunities and facilities is not currently a problem. In order to forestall this possibility, however, a mechanism should be created for the intervention of the city if a key property may be lost to its most beneficial use in the Arts District. This will require the development of a specific policy and mechanism for funding the acquisition. Most likely, an intervention strategy will be most flexible if it uses the DPC, a quasi-public agency, as the ownership vehicle. This increases the flexibility and timeliness of the response to a rapidly developing situation.

ARTS DISTRICT SPONSORED FUNCTIONS AND PROGRAMS

Issue: The Need for a Local Arts Agency

As mentioned in the opening of the subsection on the physical district above, one reason for the lack of a clear identity for the Arts District is that there is no organization with primary responsibility for its development and operation. While the many recent initiatives cited in Section II are very encouraging, there

are also signs that the *ad hoc* approach to developing the Arts District has reached its limits. These include:

- The failure of the Arts District concept to gain wide-spread public recognition,
- Reports during interviews of communications problems and duplication of efforts between organizations within the Arts District and with other agencies promoting the downtown,
- Opinions voiced during interviews and public meetings that the Congress Street area has been “studied to death” to little apparent affect and that a new approach is needed in order to achieve meaningful results, and
- Most importantly, the complexity of the next steps that are required to develop the Arts District.

Among the agencies currently operating in the downtown, all have broad mandates that effectively prohibit a highly focused position of advocacy and aggressive development effort specifically for the Arts District. At the same time, the consultants heard from almost every quarter that “the last thing needed” in downtown Portland was yet another organization involved in promotion and programming. In addition, the cost of creating and operating an agency solely to operate the Arts District and its programs was considered by the majority as an expenditure to be avoided.

The challenge, therefore, is to achieve the objectives of the Arts District in a coordinated effort with the proper degree of focus and attention to detail without duplicating the organizational infrastructure embodied within the current agencies and organizations at work in Portland.

Issue: The Role of a Local Arts Agency in the Community

An exceptional opportunity exists for creating a strategic vision and an implementation capability that are cost effective and appropriate for the Arts District. The Portland Arts and Cultural

Alliance (PACA), after an initial period of start-up and study, appears to be prepared to develop into the role of the community's Local Arts Agency (LAA). LAA's take many forms. They are known variously as Arts Councils, Arts Commissions, Offices of Cultural Affairs and the like, depending on their legal basis and their status as public or private entities. In very broad terms, most are either private, non-profit corporations or agencies of city government.

What is a Local Arts Agency and What Does it Do?

In the consultants' opinion, it is highly unusual that a city with the wealth of cultural institutions and assets that Portland enjoys has accomplished so much in the cultural realm without the assistance of a local arts agency. However, PACA's own self-study has brought it to the decision that the time is upon the community when a local arts agency is necessary. That PACA is a private, non-profit organization also acknowledges the reality that attempting to establish a new city government agency to serve in this capacity would clearly be running against the tone of local attitudes about the size and role of government in the community.

Just as the names under which LAA's operate are various, so are their programs. As a basic introduction to the roles and responsibilities often undertaken by LAA's, it is useful to understand that local arts agencies are operating in many communities around the country, carrying out some or all of the following functions and activities:

- **Presenting Public Arts Events:** Offering programs in the visual, performing, and literary arts in various locations for the benefit of community residents.
- **Arts Marketing/Information and Referral:** Promoting the arts in the community, using events calendars, newsletters, "hot lines," or television or radio programs.

- **Arts Services:** Offering technical support services and training to arts organizations and artists in areas relating to financial management, marketing, fund raising, and providing other services such as maintaining ticket outlets or centralized computer mailing lists.
- **Arts Facilities Management and Coordination:** Managing one or more performing or visual arts facilities such as theatres, museums, or community arts centers or coordinating the activities of entire Arts Districts devoted to cultural activities.
- **Advocacy and Convening:** Organizing and convening the arts community as well as citizen support groups to develop joint statements, plans, positions and to educate and persuade elected officials on specific arts issues, including funding at the local, state, and federal level.
- **Art in Public Places/Percent for Art Programs:** Administering programs in which art is selected, commissioned or otherwise obtained, sited and maintained with funds from public construction budgets, other public sources, or through private contributions.
- **Grant-making:** Providing project or operating grants to arts organizations, other nonprofit organizations offering arts programs, and to artists, with funds provided by the city, county, state, and/or federal governments.
- **Arts-in-Education:** Administering programs such as school residencies (placing artists or performers in schools for several weeks), shorter-term "exposure programs" like concerts, or developing teacher training programs to augment and improve arts education in primary and secondary schools.
- **Arts Planning and Research:** Undertaking long-range cultural planning, economic and marketing studies, cultural facility plans and other types of research for their communities which is usually integrated with other city planning efforts.
- **National Urban Arts Policy:** Developing national policy (including allocation of public and private resources) for urban

arts development through participation in the Urban Arts Federation, the National Assembly of Local Arts Agencies, and the Locals Program of the National Endowment for the Arts.

The best LAA's include broad community involvement in their governance, working committee's and programs. Especially important are these agencies' ties to the local business community, with whom many of the types of programs described above are executed.

This plan, and especially its Supplements – "A Study of Portland's Arts Audience" and "A Cultural Census of Portland" – are designed to be contributions to a larger community cultural plan that is to be completed in the future. Typically, a community cultural plan includes a major effort toward defining the roles, structures and funding mechanisms for the city's local arts agency. This work remains to be done in Portland and it is not the intent of the consultants to circumvent the appropriate planning processes for the creation of an LAA. Nor do they intend to force a role upon PACA that may be unwelcome. However, the arguments for designating PACA as the eventual Local Arts Agency are very compelling. They include:

- The composition of PACA represents the full range of major arts and cultural institutions within the community and as such it is the resource possessing the highest degree of expertise, understanding and capability in carrying out arts-related programs and functions. The high level of involvement of cultural institutions in development of the Arts District, and their physical concentration there, make significant involvement of PACA in the affairs of the Arts District extremely desirable.
- Through the assignment to develop and administer arts programs and functions within the Arts District, PACA's organizational capability will be strengthened. The objectives of the Arts District development plan can be achieved through the strengthened PACA without creating a stand-alone agency.

- Many of the efforts required to develop the Arts District, including information brokerage, production and coordination of cultural events, technical assistance to arts organizations, promotional activities and lobbying are all within the domain of PACA and its constituent members.
- The choice of a Local Arts Agency for the development of Portland's Arts District is a method that has been proven elsewhere, such as in Dallas and Tucson.
- Finally, initial conversations with PACA's leadership indicate a willingness to carefully consider accepting this responsibility.

Recommendation III.8 : The City of Portland should establish a Local Arts Agency which will have primary responsibility for managing arts-related events and programs and for collaborating on marketing and management initiatives affecting the Arts District. The City of Portland should designate the Portland Arts and Cultural Alliance as its Local Arts Agency.

This city nomination is important, for it will form the basis of the city's relationship with the organization and provide a basis for PACA to develop into the role.

Recommendation III.9: The city should transfer its current programs in support of the cultural resources of the community and the Arts District to PACA for administration. It should provide adequate funding to the agency to continue and expand the city's roles and involvement through the provision of those services under contract to the city.

It is important to understand that city involvement in arts programs and support has strong precedents. In Section II of this report, an extensive listing of city initiatives in the area of cultural affairs is presented. Not least of these is, of course, the funding

and coordination of this development plan. Initial conversations with city officials indicates that they, too, are willing to consider seriously the nomination of PACA to provide arts management services for the Arts District, and to take on the city's other arts-related initiatives as well.

Issue: Interim Management Structures

The recommendation to designate PACA as its Local Arts Agency does necessitate that an interim management group be formed in order to pursue the plan in the near-term, pending the time when PACA is ready to assume its role. This will assure that the development plan progresses without waiting for PACA to reach the point of readiness to assume the Arts District initiatives.

Recommendation III.10: *The city should constitute a small group of experienced managers representative of the constituencies of the Arts District, such as business, the cultural community, city government and education to provide leadership for the Arts District until such time as PACA assumes arts management responsibilities. This group, called the Arts District Interim Group, should be appointed by the City Manager to accomplish the near-term programs of the plan.*

The Arts District Interim Group will be charged with assembling existing resources and directing the collaborative efforts recommended to accomplish the plan's objectives, and to coordinate the transfer of arts management responsibility to PACA. The Interim Group (ADIG) should number no more than five managers and should expect to direct the progress of the plan for 12 to 18 months.

Issue: Near-term Management Initiatives in the District

While there are countless initiatives that may be begun in the district, several are recommended as strategically important to the early success of the plan.

Recommendation III.11: The Arts District Interim Group, in collaboration with other city resources, should undertake five critical programs to initiate the Near-term Development Plan for the district. They are:

- Adopt a Mission Statement and endorse the Development Plan,
- Continue and expand outdoor events in the Arts District,
- Design and implement a Rapid Start Exhibition Program to utilize empty storefronts and other underutilized properties in the Arts District,
- In conjunction with Portland's Downtown District (PDD), develop and coordinate a Near-term Marketing Strategy for the Arts District, and
- Participate in a Near-term Physical Improvement Strategy.

These initiatives should be addressed in a short-term written strategic plan, to be completed as the Arts District Interim Group's first order of business within three months of its assembly. This strategic plan should describe in detail the plan of action to achieve the five critical programs, including responsibilities and collaborations, time frames and standards for measuring success.

Adopt a Mission Statement and Endorse the Development Plan As a first step, it is critically important that the city and all participants in the Arts District share a common mission statement for the District and share a commitment to the development plan. The mission of the Arts District Interim Group and of PACA as the Local Arts Agency should be to work in partnership and in collaborative ways with the City, PDD, arts and cultural institutions and all other Arts District participants. A proposed Mission Statement is included in Section IV of this Report, along with a set of goals and objectives for the Arts District. Within the first three months of its assembly, the ADIG should prepare a written strategic plan that details the actions required to achieve the short-term initiatives. The detailed devel-

opment plan is provided in Sections V and VI of this Report.

Continue and Expand Outdoor Events in the District

A key element in establishing the identity of the Arts District is to provide as much visible arts activity as possible, and to provide many reasons for pedestrians to visit. The programs created for the summer of 1995 by Maine Arts will create a momentum of public involvement that should be continued and built upon. This initiative includes the critical role of coordinating public activity schedules in order to enhance the programming efforts of arts and cultural institutions, the ADIG and PDD.

Design and Implement a Rapid Start Exhibit Program

In order to counter the impact of the many vacant street level properties in the Arts District, a program should be developed to place high quality art installations in the windows and, wherever possible, to use the interior spaces for exhibitions as well. Coordination with property owners, artists and other institutional partners will be required and a gala opening for the program could provide another highly visible event for the Arts District.

Develop and Coordinate a Near-term Marketing Strategy for the Arts District

A near-term marketing strategy is required that will coordinate the disparate efforts in the Arts District and capitalize on the promotional efforts already underway by the cultural institutions, businesses and PDD.

Through leveraging the existing resources (time and money) and mutually supporting marketing efforts, this strategy (as compared to a highly developed, formal marketing plan) will serve to maximize the impact of resources and talent already present and operating in the Arts District.

Participate in a Near-term Physical Improvement Strategy

Just as many of the Arts District's participants are already involved in marketing and their efforts can be co-

ordinated into a near-term marketing strategy, so too are the city and others involved in physical improvements to the Arts District. Coordination of those efforts (lighting improvements, dialogs about returning street furniture to Monument Square, banners for PDD events, etc.) can yield a maximum benefit for the Arts District that can be accomplished rapidly, without expenditure of extensive resources.

Further details of these initiatives are presented in Section V of this Report.

Issue: Longer-term Development Initiatives in the Arts District

Recommendation III.12: Over the longer term, PACA, as the Local Arts Agency, should work with the other related entities to complete and implement three major items of strategic planning:

- *A comprehensive urban design plan for the Arts District,*
- *A formal marketing plan, and*
- *Feasibility studies for new facilities in the Arts District.*

The major function of PACA will be creating more sophisticated responses to the needs of the Arts District, while maintaining the presence of the original, near-term projects. Appropriate and necessary longer-term projects for the Arts District include:

Commission and execute a comprehensive urban design plan for the Arts District as a joint initiative with the City and PDD

As opposed to the near-term strategy, the urban design plan would be a professionally produced masterplan for the physical appearance of the Arts District. It would entail a multi-year implementation to arrive at a substantially improved Arts District over time.

Coordinate the completion of a formal marketing plan for the Arts District

While the near-term strategy focuses on coordinated execution of existing efforts, the formal marketing plan for the Arts District would be a strategic plan oriented toward the longer-term exploitation of new market segments. The plan should focus on development of audiences and customers over time and expanding the cross-over consumption of arts, retail and restaurant products and services. Again, a formal plan developed with professional assistance and including all interested parties would encompass a multi-year implementation period, leverage resources and detail collaborative promotional efforts.

Formally investigate the need for additional arts facilities in the Arts District and assist in the development of new facilities as justified

A recurring theme in the fact finding that preceded this plan was the conviction on the part of many individuals interviewed that additional cultural facilities were needed in the community. These range from small theatres, through galleries and exhibition space, to community facilities for art education. The development of new facilities in the Arts District must be justified by proven feasibility, but will also respond to the unique potentials presented by specific properties or organizations within the Arts District.

Details of these plan elements are presented in Section VI of this Report.

CULTURAL INSTITUTION DEVELOPMENT AND SUPPORT

In the broadest sense, every effort expended toward the development of the Arts District serves the interests of the cultural institutions located there. Similarly, efforts on the part of the resident institutions to develop audiences attract people to the Arts District.

Issue: Market Realities for the Resident Arts Institutions

Based on interviews with arts organization managers and the findings of the audience survey conducted for this planning process, several factors appear to be present in the market area.

- The high participation rate and the large proportion of frequent attenders indicates that the local market is well developed and mature. There are probably not large segments of undeveloped market remaining to be stimulated.
- Audience members view the availability, quality and variety of programs and institutions very positively.
- Audience members are sensitive to inconvenience factors now associated with the Arts District. These are amenable to correction.
- Current audience members express interest in joint marketing initiatives such as dinner and performance packages, sampler subscription offers and free parking.
- The potential contribution of tourists, visitors and seasonal residents to the total audience mix has not been studied and is not well understood.

There are two specific initiatives that are recommended for the cultural organizations, to be conducted in coordination with the Arts District Interim Group.

***Recommendation III.13:** As part of the near-term approach to developing the Arts District, resident arts organizations and institutions should develop a marketing strategy that coordinates their current efforts with those of the Arts District Interim Group to market and promote the Arts District.*

This recommendation closely parallels the concept of the near-term marketing strategy recommended for the Arts District. Both emphasize the coordination of existing efforts and resources, re-

quire little formal funding or study and can be rapidly implemented.

Recommendation III.14: *As soon as possible, PACA and resident arts organizations should develop a sophisticated, joint audience development plan. This plan should include investigations of the opportunities for joint marketing and promotion between the organizations, cross promotions with businesses in the area and the potential development of the tourist, visitor and seasonal market residents.*

Existing market information for the city's cultural institutions is fragmentary and the study commissioned as part of this planning project is the first coordinated study ever developed. Although it points the way for some new initiatives and gauges the general condition of the marketplace, it is nonetheless general in its approach.

BUSINESS DEVELOPMENT AND SUPPORT

Just as all efforts at developing the Arts District accrue to the benefit of the resident arts institutions, so too do they benefit businesses in the area. Initial studies of the Arts District focused on the needs of the business community and, as reviewed in Section II of this Report, the Arts District concept emerged largely as an economic development idea. There are, however, several issues and initiatives that are directly related to business interests.

Issue: The Market Realities

The 1992 downtown retail market study by Market Decisions, Inc. recommended a strategy for retailing that recognizes that the general goods and many comparison goods markets are lost to the downtown, especially to Congress Street. Their recommendation concentrates on the development and capture of four vital niche markets: the office worker market, the Peninsula's resident

market, the gift and specialty goods market (derived from the larger, six-community primary market area) and the tourism and visitors market. Especially attractive were the restaurant segments catering to visitors and arts and entertainment consumers. The report recommended positioning much of the Congress Street corridor as an Arts District.

The audience survey conducted for this planning project confirms the strength of the food and drink market related to arts attendance. In that survey, 71 percent of the arts attenders reported that they typically included dining, snacks and beverages as part of their attendance habits. The average expenditure was reported to be \$22.36 per person, per event for this group. Another way of stating this is that, on average, each additional person attending an arts event or institution also represents nearly \$16 of potential expenditure for food and drink. Given that the major institutions and other cultural groups in the Arts District currently attract nearly 750,000 attendees already, the potential market is considerable.

In addition, those attendees will also purchase retail goods and services, although projecting the amounts of that spending requires detailed data that could not be developed due to limitations on the length of the audience survey.

Clearly, the potential for businesses both within the Arts District and elsewhere in downtown Portland (especially in the Old Port, with its high concentration of eating and drinking places) is very significant. The key approaches will be to promote the spending opportunities available to audience members, and to provide a business environment conducive to investment and business development.

Recommendation III.15: *The City's Economic Development Department and its Division, the Downtown Portland Corporation, should augment their near-term strategy to attract complementary new business to the Arts District in consultation with the Arts District Interim Group (ADIG). This strategy should focus on the existing market potentials represented by arts audiences and should maximize the impact on businesses of the near-term district strategy and the near-term audience development strategy.*

As with the other recommended near-term strategies, this business attraction strategy should be rapidly developed and implemented based on existing downtown development efforts sponsored by the City Office of Economic Development and its Division, the Downtown Portland Corporation.

In the longer term, the Arts District will benefit from a detailed plan for attracting businesses and retaining them in the Arts District.

Recommendation III.16: As part of the Longer-term Plan, the Economic Development Department and its Division, the Downtown Portland Corporation, should continue to update its formal plan for attracting, stabilizing and retaining new businesses to the area.

Typically, this type of business development plan matches available real estate with specific business types, provides access to financing and other location incentives and creates service programs to assist new businesses once they are in place. The Economic Development Department has an established program to provide these services.

Issue: Support for Start-up Businesses

The Congress Street Advisory Committee rightly observed in its report that the low rents in the Arts District tended to attract small start-up businesses, many of which were new ventures by first time entrepreneurs. The Committee recommended that support programs should be developed to help these at-risk businesses succeed.

Recommendation III.17: The Economic Development Department and its Division, the Downtown Portland Corporation, working in concert with ADIG, the Arts District businesses and appropriate institutional partners, should identify and encourage new endeavors to utilize established programs for training, financial assistance and marketing to support start-up businesses in the Arts District.

Many potential institutional partners exist for this type of program, including local colleges and universities, the Chamber of Commerce, the Small Business Administration and others. The program could be adapted over time to meet the evolving needs of new businesses and, perhaps more established and mature businesses as well.

Issue: Commercial Entertainment in the District

An area of concern for many observers of the Congress Street situation is the future role of commercial entertainment establishments in the area. In Portland, these businesses are most frequently restaurants, clubs and bars. The largest single venue for commercial entertainment-type events in the city, the Civic Center, is adjacent to the Arts District. These businesses represent a valuable asset in the Arts District for several reasons.

- They provide employment for local artists and other local residents and most are viable, tax paying businesses.
- They enhance the range of attendance opportunities for residents of the market area. The audience survey revealed that arts attenders are significant consumers of popular music, jazz, rock and roll and live comedy, all of which often are available in both commercial and non-commercial venues in most cities.
- They serve to increase the pedestrian traffic in the Arts District, especially in the evening hours.

- Their presence is consistent with an overall opinion, voiced by the vast majority of those contacted during the fact finding for this plan, that the Arts District should be attractive to everyone in the community, not just those who are consumers of the programs provided by the resident arts institutions.

Currently a tension exists between residents in the Arts District and club operators over late night noise levels and the presence of young people in the Arts District during the evening. Proposals have been made to limit the hours of operation for clubs in the Arts District, and the particular question of licensing of clubs for young people (below legal drinking age) is being debated at the City Council level and among law enforcement officials.

***Recommendation III.18:** The goals for the Arts District should formally recognize the appropriateness of commercial entertainment operations in the Arts District and seek to integrate them into all Arts District initiatives.*

Once again, it seems that part of the issue here is the low level of pedestrian activity in the area, which intensifies the fears of residents about their safety on the street. Similarly, noise levels and other activity objectionable to local residents would doubtless be reduced if the streets were more active at night with a healthy mix of consumers. Rather than restricting or prohibiting responsible operations of this type, local officials should seek means of working with the businesses and residents to reduce undesirable impacts on the downtown area.

Issue: The Regulatory Environment

A final issue that was noted in the Congress Street Advisory Committee's report and raised by many of those interviewed is the highly regulated nature of the Arts District environment. It is considered here as a business concern, rather than as a more general concern of the physical environment because it is most often mentioned as a barrier to business location and investment.

In fact, the Arts District is highly regulated. It is subject to the provisions of the Downtown Urban Design Guidelines (controlling signage and the like), the Pedestrian Activities District (regulating street level building use), Historic Preservation, other city zoning and building codes and the Federal Americans with Disabilities Act (ADA). In some instances, building codes for fire and safety have been cited as obstacles to creating studio and living spaces in the upper stories of buildings within the Arts District. In addition, privately owned properties are, of course subject to property taxes (which the Congress Street Advisory Committee felt may represent overvaluation in some cases) and the tax surcharges that fund the activities of Portland's Downtown District.

What is less clear to the consultants is the actual impact of these regulations on businesses in the Arts District. Very few anecdotes of real business decisions being made based on regulatory restrictions were offered during meetings and interviews. Whether the combined effect of these regulations is more of a hindrance or a help to the Arts District is a matter of some debate.

Recommendation III.19: The City and interested Arts District participants should undertake an assessment of the total regulatory environment controlling the Arts District to ascertain its impact on business location and residential/studio uses there. Modifications to the regulations and their interpretation should be considered if they are found to be counterproductive for appropriate development in the Arts District.

In the absence of highly detailed research, no specific recommendations can be made at this time. Nonetheless, a structured look at the impact of the regulatory environment is needed.

INDIVIDUAL ARTIST'S CONCERNS

The presence and interest of a large number of individual artists, representing many arts disciplines, has been an unusual and very

valuable part of the planning process. In the consultants' experience, the level of artist interest in the development of the Arts District is unparalleled.

Issue: Enhancing the Presence and Opportunities for Artists in the District

Whether or not artists actually reside in the Arts District, the common need of artists is to show (and sell) their work or perform in their discipline. In the case of the Arts District, the artists' need directly coincides with the need at the Arts District level to provide the highest level of visible art activity possible. The recommended Rapid Start Exhibition Program and the recommended continuation and expansion of the outdoor programming (both contained in **Recommendation III.11** above) are examples of the ways in which the Arts District can work with artists to meet their common objectives.

Issue: Artists' Living and Working Space in the Arts District

The growing sophistication of the community of local artists interested in securing living and working space within the Arts District and downtown was noted in Section II of this Report. A key point is that, without ownership of the properties, artists are vulnerable to the dislocating force of rising property values, which can price them out of their spaces. For major buildings that can be identified in advance, such displacement could be avoided with the safeguarding of physical opportunities in the Arts District as recommended (**Recommendation III.7**) in this Report. However, smaller scattered locations or clusters of artists would not benefit from this approach. Therefore, there is a need for protective initiatives and artist leadership in this area which should be supported at the city level and by the Arts District Interim Group.

Recommendation III.20: *City agencies and the Arts District Interim Group should provide technical and financial support for initial pilot projects to create ownership opportunities for artists' living and working space in the Arts District.*

In addition, the recommended review of the regulatory environment controlling the Arts District (**Recommendation III.19**) is intended to include a review of the zoning and building code regulations that apply to residential and studio spaces located there. While no one would advocate unsafe living and working conditions for artists, there is a considerable discretionary range of building code interpretation that may be applied in these cases.

For the longer term, a detailed artists' living and working space plan can be accomplished based on the outcome of the initial pilot projects.

Recommendation III.21: *A longer-term plan for the development of artists' living and working space should be completed by PACA based on the experience gained through the development of local pilot projects.*

This plan should specify available properties, financing and other support services to be used to accomplish a specific long range agenda for artists' presence in the Arts District.

Issue: Artists as Business People

It is not generally appreciated that artists in all disciplines are, most often, forced into entrepreneurial roles in order to develop exposure for their artistic efforts, and to make a living. In the absence of a Local Arts Agency, very little support for marketing and promoting artistic product or performances is available to Portland's artists.

Recommendation III.22: Working closely with local artists, PACA should develop a program of training and assistance for the business activities of artists, both within the Arts District and throughout the community.

This program may be developed in cooperation with, or as an extension of the new business support programs recommended for the Arts District (**Recommendation III.17**). Similarly, institutional partners for the delivery of training programs may be found in the major arts institutions, colleges and universities and small business assistance groups.

Issue: New Facilities in the District

A final concern, presented here because of its overall impact on the community's artists, is the recurring discussion about the possibility of expanding the community's supply of cultural facilities within the Arts District. Many suggestions have been put forward, including:

- One or more small "black box" theatres – inexpensive, flexible spaces seating up to 150 audience members,
- A formal theatre seating approximately 500,
- Cooperative exhibition and sales gallery space, patterned on the Torpedo Factory in Virginia,
- Rehearsal facilities and cooperative studios,
- Instructional facilities for visual and performing arts,
- A community art center, and
- An artists' service center.

At this time the Maine College of Art's new building, the Children's Museum of Maine's large format theatre and the Calderwood Bakery Building project are under planning or development and there are no further institutional facility projects that are imminent. The list of suggestions above currently have no institutional sponsors, and detailed evaluations of their feasibility would be premature.

Recommendation III. 24: PACA should assist in the development of formal feasibility studies for proposed new facilities in the Arts District, and should support the creation of new cultural facilities when justified.

A key element of this recommendation is the assurance that proposed cultural facilities are properly planned and feasible before committing to their development in the Arts District. Formal consideration of city policies regarding capital funding and operational assistance for new facilities is a logical component of the larger Community Cultural Plan. In the longer term, it may be appropriate for PACA to spearhead the creation of new cultural facilities, based on proven need, market support and viability.

COMMUNITY-WIDE CULTURAL ACTIVITIES

Two remaining initiatives, discussed briefly above, will have an impact that extends well beyond the boundaries of the arts district.

Recommendation III.25: The city, in partnership with PACA and the larger cultural community, should complete the Community Cultural Plan that was started with components of the Arts District planning process.

Although it is the stated objective of city staff to complete the development of the Cultural Plan, this recommendation emphasizes the close interrelationship between the development of the Arts

District and the future of Portland's cultural community as a whole. Many of the objectives and initiatives of this plan can have an impact beyond the Arts District's borders, and the larger community needs and priorities should be brought to bear on the use of scarce resources in the Arts District itself.

Recommendation III.26: PACA should complete a long range plan that encompasses its role as the agency designated to develop the Arts District.

A long range plan for PACA is already on its leaders' agenda for the organization. This recommendation formally endorses the inclusion of Arts District responsibilities in that plan and points the way toward a definition of PACA's relationship with the city, as recommended above (**Recommendations III.8 and III.9**).

SUMMARY: ANALYSIS OF KEY ISSUES

As was stated at the beginning of this Section of the Report, the issues facing the Arts District are complex and highly interrelated. The discussion above provides the rationale for the goals and objectives recommended for the Arts District in the next Section. Each of the 26 recommendations underpins an element of the development plan that is presented in the final Sections of the Report.

SECTION IV. RECOMMENDED GOALS AND POLICIES FOR THE ARTS DISTRICT

The basis of any development plan is a shared statement of the intent of the plan and the goals of the participants. In this section of the Report, the consultants discuss the vision for the future of the Arts District and present a series of recommended goals and policy positions. Without consensus on these basic tenets, the plan will not be well understood and its results are likely to be compromised. Therefore, the recommendations presented below are the consultants' formulation of a set of goals and policies that they believe can find consensus in Portland, based on the planning process underlying this Report.

This section closes with a discussion of some unrealistic expectations that have been voiced in the community. Arts districts are powerful development tools and wonderful urban amenities, but they cannot solve all problems or satisfy every participant. The points of this discussion provide another touchstone to be used by all of the participants in the district as they gauge the progress made and the ultimate success of the Arts District in Portland.

THE MISSION FOR THE ARTS DISTRICT

The community's collective vision for the future of the Arts District appears to the consultants to be very closely aligned to the

vision for the entire downtown that is expressed in the Downtown Vision plan. As discussed in Section III of this Report, the Downtown Vision Plan initiated the Cultural Corridor Concept and has served to stimulate many of the current initiatives in the Arts District. It is included in this Report as Appendix B.

The vision statement from the plan is extensive and covers many aspects of the future of downtown Portland. A very loose abstraction can be found in its topical headings:

- "A Downtown for People,"
- "A Downtown of Opportunity"... where opportunities abound for expanding existing or creating new businesses,
- "A Beautiful and Rich Downtown,"
- "A Progressive and Active Community,"
- "A Downtown Which Celebrates."

Each of these informs the Arts District plan, and the consultants believe that the recommendations of the Downtown Vision Plan form a strong basis for action in the Arts District. What is needed is a succinct statement of a mission for the Arts District itself that is easily communicated and will achieve wide endorsement.

Recommendation IV.1: The interested parties in the development of the Arts District should formally adopt the following Mission Statement:

The Arts District in Downtown Portland is a vital mixture of the arts, business and community involvement. Through excellent art and sophisticated business practices it serves the entire region. Every individual resident or visitor to Portland knows of its presence and has a reason to visit the Arts District. Because it exists, Portland's arts institutions are stronger, its artists are more prolific and its citizens enjoy a high quality urban environment unparalleled in the region. Successful development of the Arts District builds upon a partnership of endeavors to achieve a heightened street vitality, enhanced community life and commercial prosperity.

GOALS AND OBJECTIVES FOR THE ARTS DISTRICT

There are seven primary goals recommended for the Arts District in Portland. They are contained in Recommendation IV.2

***Recommendation IV.2:** The Arts District participants should formally adopt a statement that contains the following seven overall goals for Arts District development.*

“Investment in development of the Arts District is intended to:

- Improve the economic performance of arts institutions in the Arts District and throughout the city.*
- Enhance the economic impact of arts institutions in the city.*
- Create a more favorable business climate in the District and in downtown Portland.*
- Support the creative efforts of individual artists and safeguard their continuing presence in the community.*
- Contribute to the overall quality of life in the community.*
- Establish an Arts District that is a permanent feature of downtown Portland.*
- ~~Build~~ build community trust and collaboration of broadly diverse groups as a way of fostering cross-cultural communication and understanding.”*

Each of the recommended goals is derived directly from expressions of community interest and the larger goals of the Downtown Vision Plan. Objectives to meet each of the seven stated goals of the Arts District are recommended below and the intent of the goals and objectives is discussed. Specific initiatives

to attain the goals are the subjects of Sections V and VI of this Report.

***Recommendation IV.3:** Investment in the development of the Arts District should strive to improve the economic performance of arts institutions in the District and throughout the city by...*

- *increasing attendance,*
- *supporting efforts to develop subscribers, stabilize audiences and develop audience base,*
- *improving marketing communications,*
- *supporting better integration of arts institutions with the other major downtown interests, and*
- *encouraging arts-related businesses to establish in, or relocate to the Arts District.*

A primary goal of the Arts District, since its initial conception as the Cultural Corridor, has been to improve the economic situation of the community's cultural institutions. The objectives for this goal stress the role that the Arts District can play in attracting audiences to the downtown and in providing a total environment that is conducive to arts attendance. In addition, the marketing and promotional programs already in place to stimulate interest in the downtown can benefit, and be strengthened by, the coordinated participation of the arts institutions in the Arts District which are currently drawing more than one-half million people downtown each year.

Recommendation IV.4: *Investment in the development of the Arts District should enhance the economic impact of arts institutions in the city by...*

- *providing opportunities for expanded spending for goods and entertainment associated with arts attendance at museums, galleries, and performing arts events,*
- *extending the length of stay for all visitors in the downtown, and*
- *increasing the overall attractiveness of the city for tourists.*

An important finding of the art audience study, conducted by the consultants as a part of this study effort, is the large scale of the impact that local arts audience members have in the region. Efforts to expand attendance should be coupled with efforts to increase the capture of that spending in Portland, both within the immediate Arts District and throughout the downtown. In addition, it is clear that Portland's ability to attract tourists and visitors can be enhanced, and that the potential economic benefits are very substantial.

Recommendation IV.5: *Investment in the development of the Arts District should create a more favorable business climate in the District and in downtown Portland by...*

- *increasing pedestrian activity and total visitorship to the downtown,*
- *improving the appearance and the occupancy rate of commercial properties in the Congress Street corridor,*
- *working in partnership to collaborate and coordinate with the other marketing and programming entities operating in downtown Portland, and*
- *assuring that the activities of the Arts District are complementary to other efforts in the city.*

The physical appearance and attractiveness of the Congress Street Corridor must be improved if new audience members are to be drawn to the Arts District and induced to return. Much of the effort in this regard must center on the goals of improving the appearance of the streetscape, enhancing the uses of many of the vacant properties in the Arts District, raising the total pedestrian activity level and improving the visitor's ability to navigate through the area. Because several agencies and business groups are engaged in dealing with these issues throughout downtown Portland, coordination and cooperation are essential.

Recommendation IV.6: Investment in the development of the Arts District should support the creative efforts of individual artists by...

- *providing a larger audience for their work,*
- *raising their visibility in the community, and*
- *providing more affordable and stable living and working spaces for artists within the Arts District.*

Portland's community of working artists is a tremendous resource and an extraordinary opportunity for the Arts District. As residents they provide safety and comfort on the street, while as producers of art in all of the artistic disciplines they contribute the essence of the Arts District experience – the presence of art as an inseparable part of the urban experience. In turn, artists have often been forced out of urban areas where revitalization efforts have been successful as real estate values, rents and occupancy rates of once-affordable living and working space all rise to unaffordable levels. The permanent success of the Arts District hinges on the continuing presence of artists. That presence must be safeguarded.

Recommendation IV.7: Investment in the development of the Arts District should contribute to the overall quality of life in the community by...

- *providing an array of arts and entertainment options for a broad cross section of the resident population,*
- *fostering healthier arts institutions,*
- *providing programs in public spaces, and*
- *improving communications about available programs.*

The ultimate goal of the Arts District must be to provide the entire community with an amenity that is important in their lives. Without this emphasis, the Arts District could be seen as an appropriation of urban space and public moneys for the benefit of only a few institutions and their supporters. Viewing the arts district as a single public venue for the delivery of arts programs to the entire community is important because that point of view naturally results in an emphasis on variety of programs and access to them. At the same time, it is critical that an essential emphasis on quality be maintained.

Recommendation IV.8: Investment in the development of the Arts District should establish an Arts District that is a permanent feature of downtown Portland by...

- *creating a recognizable physical focus for downtown arts programming,*
- *safeguarding the continued availability of performance venues, studios, artist housing and other key properties, and*
- *providing for stable direction and funding for the Arts District.*

Finally, it is very important to understand that urban areas develop and redevelop over extended periods of time. The institutions that are called upon to assist in this instance – Portland’s cultural institutions – are continually challenged to meet their own difficult financial realities. The Arts District must, therefore, be viewed as a permanent feature of downtown Portland, deserving of long term strategies and commitments. Because some of the key performance venues and other properties are in private (non-institutional) ownership, their continuing availability, or even continued existence over time is not assured. Providing safeguards for the future is, therefore, part of the longer term commitment that must be made to the Arts District.

Recommendation IV.9: Investment in the development of the Arts District should strive to build community trust and collaboration of broadly diverse groups as a way of fostering cross-cultural communication and understanding by...

- offering opportunities to inform, share experiences and transcend differences of race, ethnicity and religion through art as a means to promote a greater understanding among and between the increasingly diverse constituent populations of Greater Portland,*
- offering outlets for creative expression for members of Portland’s population who are disconnected from the underlying social and economic fabric, leading to bridges into the societal network, and*
- providing a common setting at public outdoor activities and events for mixing of people who do not otherwise have opportunities for positive interactions due to variations or differences in economic, physical, age or other personal circumstances.*

Downtown Portland, like all downtowns in America, is a confluence of people of difference – people who are part of the community, but apart from it in some respects. The arts can serve as one way to reduce separation and indifference by building bridges of tolerance, understanding and generosity of spirit and by making the differences among us a source of strength, unity and pride. The arts and cultural events of the Arts District will be accessible

to diverse populations and will celebrate the unique attributes offered by Portland's culturally rich populace.

GUIDING POLICIES FOR THE ARTS DISTRICT

The Arts District is a cooperative venture between the public, private and nonprofit sectors in Portland, in service to the residents of the city and its visitors. It is important that all participants share a vision of the intent of the Arts District and the relationship that each of the sectors has to the plan. Throughout the planning process, individuals and institutions located in downtown Portland expressed apprehension that they would be "left out" of the benefits of the Arts District, or that the Arts District plan would fail to recognize their legitimate concerns and interests. Formal policy statements, endorsed by the participants, are an excellent means to prevent future disagreement over the original intent of the plan and to provide assurance that the interests of the many participants are recognized.

These policies have grown out of the many interviews, public meetings and Steering Committee sessions. While not everyone will agree with every recommended policy, the consultants believe that consensus can be developed around them. The recommendation below provides a set of policies that define the interrelationship of the important participants in the Arts District and the larger downtown community.

Recommendation IV.10: *The Arts District participants should formally adopt a policy statement that contains the following concepts. The Arts District:*

- *seeks to attract and serve the broadest possible audiences to the Arts District and to encourage maximum public participation in downtown life.*
- *includes all downtown arts activities, within its mission but concentrates as a promotional strategy on a limited geographic area.*

- *recognizes the importance of commercial entertainment within the downtown and seeks to create an environment that supports businesses engaged in those activities.*
- *emphasizes cooperative ventures and integration with businesses and institutions in the entire downtown area.*

As may be readily understood, the policies recommended above stress the mixed business and arts use of the Arts District, as well as emphasizing the goal of wide attractiveness and accessibility for all members of the community. Commercial entertainment, such as music and dance clubs and bars featuring live music, exist at an important nexus of the non-profit arts and business worlds. The recommended policy statements seek to assure a place and a legitimacy for these participants in the Arts District, both as business enterprises with significant appeal in the community and as employers of artists.

UNREASONABLE EXPECTATIONS FOR THE ARTS DISTRICT

During the course of the extensive interviewing process and the public meetings held for this planning process, a number of misconceptions and unreasonable expectations surfaced that could have an impact on public acceptance of the Arts District as a concept and on the plan for its development. This is not surprising, because enthusiasm for the Arts District runs high, as do expectations. Before proceeding into the specific elements of the plan in Sections V and VI, it is important to address some of these issues directly.

One expectation, which does not seem to be widely held, is that the Arts District will return the historical economic fundamentals of the area, especially regarding the dominance of retailing in the Congress Street corridor. It is important to realize, as did the Congress Street Advisory Committee and the 1992 Downtown Portland Retail Market Study, that while there are specific retail marketing strengths and market niches that can be served on

Congress Street, the comparison goods (department store) retailing era for Congress Street is past and extremely unlikely to return. This in turn means that many buildings and shop bays will require reinvestment in order to be usable in the future.

A second unreasonable expectation, which is more prevalent, is that the development of the Arts District will effect wholesale structural change in the operating economics of arts organizations. This is potentially a very dangerous expectation, because there are many forces that operate on the economic future of arts organizations that will not be subject to much, if any, impact through Arts District development. A few of these forces include structural changes in corporate and individual giving in support of the arts, long-term shifts in the demography of the population at large, the continuing development of media alternatives to live artistic performance *and* experience of the visual arts, and ever-escalating costs of energy, insurances and many other cost components. A successful Arts District can deliver more audience and increase the presence and visibility of institutions in the community, but it will not eliminate the challenges posed by these many other factors.

A final problematic expectation is that near term investment in the Arts District will have a rapid effect on many of the problems in downtown Portland that have been intractable over the long term. The plans that follow are intended to provide the most rapid change possible, in the most cost-effective ways, but they are not overnight solutions. Determination and consistency will be required to create improvements in the longer term.

SECTION V. THE NEAR-TERM PLAN: THE NEXT EIGHTEEN MONTHS FOR THE ARTS DISTRICT

The recommendations of Section III and the goals and policies presented in Section IV are brought together in a formal plan in the final two Sections of this Report. Section V presents those plan elements that are crucial for the next 18 months of development for the Arts District. Section VI presents those initiatives that begin following the Near-term Plan and continue for the foreseeable future.

IMPORTANT FEATURES OF THE NEAR-TERM DEVELOPMENT PLAN

The Near-term Plan has several important features:

- The expected duration of the Near-term Plan is approximately 18 months from its endorsement.
- The plan responds to the need to develop the Arts District and associated initiatives, with no established arts management entity in the district.
- It designates both an interim arts management structure and the succession to a permanent Local Arts Agency.

- The development of strategy in the near-term relies heavily on involvement of the actual participants in the Arts District – business owners, resident arts institutions, downtown development agencies, artists and City government.
- All of the recommended initiatives are of very high priority. Relative priority is generally indicated by the start dates for each initiative. Early initiatives should be underway or complete before later ones are begun.
- Most early plan elements rely on coordinated use of existing programs and current activities in the areas of promotion, Arts District improvements and audience development. This approach requires the lowest start-up cost and shortest time possible.

THE ELEMENTS OF THE NEAR-TERM DEVELOPMENT PLAN

This Section of the Report is organized according to the scheme introduced in Section III. The recommended initiatives and programs are organized into six subject areas.

- The Physical District
- Arts District Development, Functions and Programs
- Cultural Institution Development and Support
- Business Development and Support
- Artists' Concerns
- Community-wide Cultural Activities

Presented in Figure V.1 below is a list of the elements of the Near-term Development Plan, organized by this subject scheme. Each element is numbered according to a hierarchical system for ease of reference. For example, all of those elements beginning with the letter "P" refer to the **Physical District** category. Those

with a single digit number following the letter, such as "P.1" are **major** development initiatives. Those with two digits are **secondary or supporting** initiatives, as in "P.1.1" which is a supporting program for the "P.1" initiative.

It should be remembered that, although the initiatives follow this numbering scheme, most are closely interrelated with other plan elements and their impacts are often felt in other areas. To illustrate the interrelationships between plan elements, Figure V.2 presents, in graphic form, the aspects of the district that are affected by each of the Near-term Plan elements.

To read this Figure, remember that the capital letters in the right hand columns refer to the categories that are used to organize the plan:

- P** = The Physical District
- D** = Arts District Development, Functions and Programs
- I** = Cultural Institution Development and Support
- B** = Business Development and Support
- A** = Artists Concerns
- C** = Community-wide Cultural Activities

Therefore, element "P.1 *Design and execute a near-term physical improvement strategy*" has an impact not only on the physical aspects of the Arts District, but on its management and on the development and support of its cultural institutions and its businesses as well.

Figure V.1 Overview of the Elements of the Near-term Development Plan

The Physical District (P)

P.1 Participate in a near-term physical improvement strategy

P.1.1 secure city and other funding for near-term Arts District improvements

P.1.2 initiate a review of city regulatory and land use policies for buildings in the Arts District

Arts District Development, Functions and Programs (D)

D.1 Create a near-term governance structure

D.1.1 adopt a mission statement for the Arts District and endorse the Arts District Plan

D.1.2 Arts District Interim Group strategic plan and report

D.1.3 establish rapid start exhibit programs

D.1.4 continue and expand outdoor events in the Arts District

D.1.5 coordinate and develop a near-term marketing strategy with PDD

D.1.6 secure city and other funding for Arts District functions and programming

D.1.7 designate PACA as the arts development agency for the Arts District

Cultural Institution Development and Support (I)

I.1 Develop a near-term audience development strategy for Arts District institutions

Business Development and Support (B)

B.1 Create a near-term business attraction strategy

B.1.1 establish improved communications and coordination of business development efforts in the Arts District

B.1.2 encourage use of established programs of training and assistance for start-up businesses

Artists' Concerns (A)

A.1 Support pilot projects for artist-owned housing and other spaces

A.2. Create a program of training and assistance for artists as businesses

Community-wide Cultural Activities (C)

C.1 Complete the Community Cultural Plan

Figure V.2 The Near-term Plan Elements and Their Interrelationships

Plan Element	P	D	I	B	A	C
The Physical District (P)						
P.1 Design and execute a near-term physical improvement strategy	●	●	●	●		
P.1.1 secure city and other funding for near-term Arts District improvements	●	●	●	●		
P.1.2 initiate a review of city regulatory and land use policies for buildings in the Arts District	●			●	●	
Arts District Development, Functions and Programs (D)						
D.1 Create a near-term governance structure		●				
D.1.1 adopt a mission statement for the district and endorse the Arts District Plan		●	●	●	●	
D.1.2 ADIG strategic plan and report	●	●	●	●	●	
D.1.3 establish rapid start exhibit programs	●	●			●	
D.1.4 continue and expand outdoor events in the Arts District	●	●	●	●	●	
D.1.5 coordinate and develop a near-term marketing strategy with PDD		●	●	●	●	
D.1.6 secure city and other funding for district functions and programming	●	●	●	●	●	
D.1.7 designate PACA as the arts development agency for the Arts District		●				
Cultural Institution Development and Support (I)						
I.1 Develop a near-term audience development strategy for Arts District institutions		●	●			●

Figure V.2 The Near-term Plan Elements and Their Interrelationships (cont.)

Business Development and Support (B)	P	D	I	B	A	C
B.1 Create a near-term business attraction strategy	●	●		●		
B.1.1 establish improved communications and coordination of business development efforts in the Arts District		●		●		
B.1.2 encourage use of established programs of training and assistance for start-up businesses	●			●		
Artists' Concerns (A)						
A.1 Support pilot projects for artist-owned housing and other spaces		●			●	
A.2. Create a program of training and assistance for artists as businesses		●		●	●	
Community-wide Cultural Activities (C)						
C.1 Complete the Community Cultural Plan		●	●		●	●

- P = The Physical District
- D = Arts District Development, Functions and Programs
- I = Cultural Institution Development and Support
- B = Business Development and Support
- A = Artists Concerns
- C = Community-wide Cultural Activities

DESCRIPTIONS OF THE PLAN ELEMENTS

Each element of the plan is described below. The description includes:

- The number of the Recommendation from Section III that creates the initiative. This serves as a cross reference back to the analysis of the relevant issues in Section III for each initiative.
- A brief statement of the intent of the initiative,
- The lead agency or group responsible for the action,
- Other important groups involved in the initiative,
- The timing within the Near-term Plan,
- An estimate of the cost of the initiative,
- Sources of funds for the initiative, and
- A proposed means of evaluating the results of the effort.

The Physical District

P.1 Participate in a near-term physical improvement strategy

<i>Recommendation:</i>	III.11
<i>Intent of the initiative:</i>	create a rapid execution plan to coordinate current improvement projects and select additional improvements for maximum near-term impact on the Arts District environment
<i>Lead agency:</i>	Planning Department
<i>Other groups involved:</i>	Arts District Interim Group, district businesses, PDD, PACA, Uptown & Co.
<i>Timing</i>	<i>begin:</i> within 6 months of endorsement of the plan

complete: until creation of the formal urban design plan (see P.2)
Cost of the initiative: minimal, coordination only
Sources of funding: existing city staff and department budgets
Evaluation technique: assessment of impact during the creation of the formal urban design plan

P.1.1 secure city and other funding for near-term Arts District improvements

Recommendation: III.11
Intent of the initiative: fund select, cost-effective projects for immediate improvement of the Arts District
Lead agency: Planning Department
Other groups involved: Arts District Interim Group (ADIG), district businesses, PDD, local artists, Uptown & Co.
Timing *begin:* upon completion of the near-term physical improvement strategy
 complete: until creation of the formal urban design plan (see P.2)
Cost of the initiative: target budget of \$50,000 for the 18 month period, in addition to improvements already funded
Sources of funding: city budget
Evaluation technique: assessment of impact during the creation of the formal urban design plan

P.1.2 initiate a review of city regulatory and land use policies for buildings in the Arts District

Recommendation: III.19
Intent of the initiative: evaluate the real impact of the current regulatory environment on business location and investment decisions, recommend changes in regulations as needed
Lead agency: Planning Department

Other groups involved: Arts District Interim Group (ADIG), district businesses, Department of Planning, Department of Economic development, PDD (Congress Street Advisory Committee), Arts District property owners, consultants if required

Timing *begin:* within 6 to 10 months of endorsement of the plan

complete: 6 months to complete

Cost of the initiative: minimal unless consultants are used*

Sources of funding: city budget

Evaluation technique: eventual effectiveness of recommended changes in assisting new business location and investment

Arts District Development, Functions and Programs

D.1 Create a near-term governance structure

Recommendation: III.10

Intent of the initiative: to create a small, cost-effective interim arts management team, the Arts District Interim Group (ADIG) to lead Arts District initiatives until the direction of the Arts District can be transferred to PACA

Lead agency: Department of Planning

Other groups involved: City Manager and city staff, all district constituents to participate as called upon in the initiatives directed by the team, an advisory committee to the team may be created if desired

Timing *begin:* immediate upon endorsement of the plan

complete: when Arts District responsibilities are transferred to PACA (12 - 18 months)

Cost of the initiative: minimal, existing staff coverage and volunteer efforts

Sources of funding: existing staff and department budgets

Evaluation technique: completion of near-term plan elements within 18 months of endorsement

D.1.1 adopt a mission statement for the Arts District and endorse the Arts District Plan

Recommendation: III.11
Intent of the initiative: to create a shared definition of the purposes of the Arts District and a shared commitment to its goals for all participants
Lead agencies: Department of Planning, ADIG
Other groups involved: all Arts District participants
Timing begin: immediate upon endorsement of the plan
complete: immediate
Cost of the initiative: no cost
Sources of funding: none required
Evaluation technique: utility of the mission statement to communicate the Arts District mission and to evaluate overall district progress

D.1.2 ADIG Strategic Plan and Report

Recommendation: III.11
Intent of the initiative: to prepare a written near term strategic plan with responsibilities, collaborations, time frames and evaluation standards
Lead agency: Arts District Interim Group (ADIG)
Other groups involved: City Planning, PDD, PACA, Dept. of Economic Development, and its Division, the DPC
Timing begin: immediate upon assembly of the ADIG
complete: three months
Cost of the initiative: none

D.1.3 establish rapid start exhibit programs

Recommendation: III.11
Intent of the initiative: to rapidly increase the visibility of arts activity in the Arts District through the use of vacant storefronts and other properties for exhibitions of art and related activities and to reduce the impact of vacancies on the appearance of the street, the art should be of high standard

Lead agency: Arts District Interim Group (ADIG)
Other groups involved: local artists, resident arts institutions, property owners and managers, PDD, Uptown & Co.

Timing *begin:* immediate upon endorsement of the plan
 complete: continues indefinitely

Cost of the initiative: although almost any amount can be spent the intent is to be extremely cost effective, budget a minimum of \$10,000 for 18 months

Sources of funding: city budget, corporate contributions, private philanthropy

Evaluation technique: impact on foot traffic volume and pedestrian comments, response of critics

D.1.4 continue and expand outdoor events in the Arts District

Recommendation: III.11
Intent of the initiative: to capitalize on the momentum of summer, 1995 programs, to increase activity levels and arts presence in the Arts District, to establish Arts District identity, to provide attractive programs for a wide variety of district visitors

Lead agency: Arts District Interim Group (ADIG)
Other groups involved: local artists, Arts District arts institutions, local arts presenters, PDD

Timing *begin:* immediate upon endorsement of the plan
 complete: continues indefinitely
Cost of the initiative: target budget \$26,000 city contribution plus \$44,000 private and in-kind contributions in the first year, increases as merited in following years
Sources of funding: city budget, corporate contributions, private philanthropy, PDD, Arts District participants
Evaluation technique: impact on foot traffic volume, increases of business volume and attendance at events, response of critics

D.1.5 In conjunction with PDD, coordinate and develop a near-term marketing strategy for the Arts District

Recommendation: III.11, III.13
Intent of the initiative: to provide a rapid-start, cost-effective, coordinated strategy to maximize the effectiveness of the existing marketing and promotion programs of resident institutions, businesses and downtown development agencies
Lead agencies: PDD, Arts District Interim Group
Other groups involved: Arts District institutions, Arts District businesses, PACA
Timing *begin:* within 3 months of endorsement of the plan
 complete: until creation of the formal Arts District marketing plan (see **D.3**)
Cost of the initiative: minimal, coordination only
Sources of funding: existing participant budgets
Evaluation technique: assessment of impact during the creation of the long term Arts District marketing plan

Evaluation technique: successful completion of contractual relationships to transfer management responsibility

Cultural Institution Development and Support

I.1 Develop a near-term audience development strategy for Arts District institutions

Recommendation: III.13
Intent of the initiative: to provide a rapid-start, cost-effective, coordinated strategy for existing marketing and promotion programs of resident arts institutions
Lead agency: Arts District Interim Group (ADIG)
Other groups involved: Arts District arts institutions, Arts District businesses, PDD, PACA
Timing begin: immediate upon endorsement of the plan
complete: until creation of the longer term audience development plan (see I.2)
Cost of the initiative: minimal, coordination only
Sources of funding: existing participant budgets
Evaluation technique: assessment of impact during the creation of the long term audience development plan

Business Development and Support

B.1 Create a near-term business attraction strategy

Recommendation: III.15
Intent of the initiative: to create a rapid start program to attract new businesses to the Arts District, focusing on the market opportunities presented by district development in the near-term
Lead agency: Department of Economic Development and its Division, the DPC

Other groups involved: ADIG, Arts District businesses, PDD, consultants, educational institution partners, Small Business Administration

Timing *begin:* within 6 months of endorsement of the plan
 complete: until creation of the longer-term business attraction, stabilization and retention plan (see **B.2**)

Cost of the initiative: minimal unless consultants are used*
Sources of funding: city budget, PDD funds, DPC funds, Department of Economic Development programs

Evaluation technique: successful attraction of new businesses to the Arts District

B.1.1 *establish improved communications and coordination of business development efforts in the Arts District*

Recommendation: III.15
Intent of the initiative: improve overall coordination of business development activities in the district

Lead agency: Department of Economic Development and its Division, the DPC

Other groups involved: ADIG, all Arts District businesses and participants, PDD

Timing *begin:* immediate upon endorsement of the plan
 complete: continues indefinitely

Cost of the initiative: no cost
Sources of funding: none required
Evaluation technique: improved relations and successful business attraction to the Arts District

B.1.2 encourage use of established programs of training and assistance for start-up businesses ^{technical} ^

Recommendation: III.17, III.22
Intent of the initiative: to support the establishment of new businesses and first time entrepreneurs, to assist the business activities of artists
Lead agency: Department of Economic Development and its Division, the DPC
Other groups involved: ADIG, Arts District businesses, consultants, educational institution partners, Small Business Administration
Timing *begin:* within 8 to 10 months of endorsement of the plan
 complete: until creation of the longer-term business attract, stabilization and retention plan (see **B.2**), may continue indefinitely
Cost of the initiative: minimal unless consultants are used*
Sources of funding: city budget, DPC funds, Department of Economic Development programs
Evaluation technique: successful attraction and retention of new ventures to the Arts District

Artists' Concerns

A.1 Support pilot projects for artist-owned housing and other spaces

Recommendation: III.20
Intent of the initiative: to provide assistance to artists seeking to establish artist-owned living and working space in the Arts District, to develop pilot projects that meet local conditions
Lead agencies: Arts District Interim Group (ADIG), Department of Community Development
Other groups involved: local artists, local property owners, consultants, PACA, real estate developers

Timing *begin:* within 6 months of endorsement of the plan
 complete: until creation of the artists' living and working space plan (see **A.2**)

Cost of the initiative: budget \$5,000 for consultation fees
Sources of funding: city budget, Department of Community Development programs, private real estate development contracts, corporate sponsors, private philanthropy

Evaluation technique: successful development of local pilot projects

A.2. Create a program of training and assistance for artists as businesses

Recommendation: III.22
Intent of the initiative: to provide training and assistance to artists in support of their business activities

Lead agency: PACA
Other groups involved: Arts District artists, Arts District arts institutions, Department of Economic Development, consultants, educational institution partners, Small Business Administration, local financial institutions

Timing *begin:* within 12 to 24 months of endorsement of the plan
 complete: may continue indefinitely

Cost of the initiative: minimal unless consultants are used
Sources of funding: city budget, Department of Economic Development programs, local business sponsors, private philanthropy

Evaluation technique: improved economic success of participating artists

Community-wide Cultural Activities

C.1 Complete the Community Cultural Plan

<i>Recommendation:</i>	III.25
<i>Intent of the initiative:</i>	to complete the Community Cultural Plan as intended
<i>Lead agencies:</i>	Department of Planning and PACA
<i>Other groups involved:</i>	all arts institutions, artists and interested institutions and citizens, ADIG, consultants
<i>Timing</i>	<i>begin:</i> Spring, 1996
	<i>complete:</i> eight months from inception
<i>Cost of the initiative:</i>	\$15,000 city funds, \$45,000 matching and in-kind gifts and grants
<i>Sources of funding:</i>	city funds, National Endowment for the Arts programs, Maine Arts Commission, corporate sponsors, private philanthropy
<i>Evaluation technique:</i>	success of the recommended initiatives over time

There are five initiatives (marked with *) for which it may be desirable to contract for consulting assistance. Only the Artists Housing initiative has a fixed budget for consultants. If additional technical assistance is required then additional funding would be needed to secure that assistance.

SUMMARY: THE NEAR-TERM PLAN

The descriptions of the plan elements are summarized in two figures presented on the following pages. Figure V.3 presents a summary of the lead agency, other groups involved and timing for each of the plan initiatives. In Figure V.4, the funds required, sources of funding and evaluation techniques are presented. For a summary of the relationship of each of the plan's initiatives to the goals and objectives recommended for the Arts District, please see Figure VI.5 in the next Section of the Report.

Figure V.3 The Near-term Plan: Leadership and Timing

Plan Element	Lead Agency	Other Key Players	Element Start-up
The Physical District (P)			
P.1 Participate in a near-term physical improvement strategy	Dept. of Planning	ADIG, district businesses, PDD, PACA, Uptown & Co.	within 6 months
P.1.1 secure city and other funding for near-term Arts District improvements	Dept. of Planning	ADIG, district businesses, PDD, Uptown & Co.	upon completion of the near-term physical improvement strategy
P.1.2 initiate a review of city regulatory and land use policies for buildings in the Arts District	Dept. of Planning	district businesses, ADIG, Dept. of Econ. Dev., PDD, district property owners, consultants if required	within 6 to 10 months
Arts District Development, Functions and Programs (D)			
D.1 Create a near-term governance structure	Department of Planning	City Manager and city staff, all district participants	immediate
D.1.1 adopt a mission statement for the district and endorse the Arts District Plan	Department of Planning	all Arts District participants	immediate
D.1.2 Arts District Interim Group strategic plan and report	Arts District Interim Group (ADIG)	Dept. of Planning, PDD, PACA, Dept. of Econ. Dev., DPC	immediate upon assembly of ADIG
D.1.3 establish rapid start exhibit programs	Arts District Interim Group (ADIG)	local artists, resident arts institutions, property owners and managers, PDD, Uptown & Co.	immediate
D.1.4 continue and expand outdoor events in the Arts District	Arts District Interim Group (ADIG)	local artists, district arts institutions, local arts presenters, PDD	immediate

Figure V.3 The Near-term Plan: Leadership and Timing (cont.)

	Lead Agency	Other Key Players	Element Start-up
D.1.5 coordinate and develop a near-term marketing strategy with PDD	Arts District Interim Group (ADIG), PDD	district institutions, district businesses, PACA	within 3 months
D.1.6 secure city and other funding for Arts District functions and programming	Arts District Interim Group (ADIG)	City Council and staff, all Arts District participants	as required
D.1.7 designate PACA as the arts development agency for the Arts District	City Council	City staff, PACA, all district participants	as soon as PACA initial planning is complete
Cultural Institution Development and Support (I)			
I.1 Develop a near-term audience development strategy for Arts District institutions	Arts District Interim Group (ADIG)	district arts institutions, district businesses, PDD, PACA	immediate
Business Development and Support (B)			
B.1 Create a near-term business attraction strategy	Dept. of Economic Dev. and its Division, the DPC	ADIG, district businesses, PDD, consultants, educational institution partners,	within 6 months
B.1.1 establish improved communications and coordination of business development efforts in the Arts District	Dept. of Economic Dev. and its Division, the DPC	ADIG, PDD, all Arts District businesses and participants	immediate
B.1.2 encourage use of established programs of training and assistance for start-up businesses	Dept. of Economic Dev. and its Division, the DPC	ADIG, Arts District businesses, consultants, educational institution partners, SBA	within 8 to 10 months

Figure V.3 The Near-term Plan: Leadership and Timing (cont.)

Artists' Concerns (A)	Lead Agency	Other Key Players	Element Start-up
<p>A.1 Support pilot projects for artist-owned housing and other spaces</p>	<p>Arts District Interim Group (ADIG), Dept. of Community Development</p>	<p>local artists, local property owners, consultants, PACA, real estate developers</p>	<p>within 6 months</p>
<p>A.2. Create a program of training and assistance for artists as businesses</p>	<p>PACA</p>	<p>Arts District artists and arts institutions, Dept. of Econ. Dev., consultants, educational institution partners, SBA, local financial institutions</p>	<p>within 12 to 24 months</p>
<p>Community-wide Cultural Activities (C)</p>			
<p>C.1 Complete the Community Cultural Plan</p>	<p>Department of Planning, PACA</p>	<p>all arts institutions, artists and interested institutions and citizens, ADIG, consultants</p>	<p>Spring, 1996</p>

Figure V.4 The Near-term Plan: Funding and Evaluation			
Plan Element	Funding Required	Sources of Funds	Evaluation Technique
The Physical District (P)			
P.1 Participate in a near-term physical improvement strategy	coordination only	existing city staff and department budgets	assessment of impact during the creation of the formal urban design plan
P.1.1 secure city and other funding for near-term Arts District improvements	target budget of \$50,000	city budget	assessment during the creation of the formal urban design plan
P.1.2 initiate a review of city regulatory and land use policies for buildings in the Arts District	minimal unless consultants are used	city budget, PDD funds, DPC funds	effectiveness of recommended changes
Management, Functions and Programs (D)			
D.1 Create a near-term governance structure	minimal	existing staff and department budgets	completion of near-term plan elements
D.1.1 adopt a mission statement for the district and endorse the Arts District Plan	no cost	none required	utility of the mission statement
D.1.2 Arts District Interim Group strategic plan and report	no cost	none required	utility of the plan
D.1.3 establish rapid start exhibit programs	budget \$10,000 minimum	city budget, corporate contributions, private philanthropy	impact on foot traffic volume and pedestrian comments, response of critics
D.1.4 continue and expand outdoor events in the Arts District	target budget \$70,000 (city funds and private match)	city budget, corporate contributions, private philanthropy, PDD, district participants	impact on foot traffic volume, increases of business volume and attendance at events, response of critics

Figure V.4 The Near-term Plan: Funding and Evaluation (cont.)

	Funding Required	Sources of Funds	Evaluation Technique
D.1.5 coordinate and develop a near-term marketing strategy with PDD	minimal	existing participant budgets	assessment during the creation of the long term district marketing plan
D.1.6 secure city and other funding for Arts District functions and programming	minimal	city budget and other public and private funds	success in funding district initiatives
D.1.7 designate PACA as the arts development agency for the Arts District	no cost	none required	successful completion of contracts
Cultural Institution Development and Support (I)			
I.1 Develop a near-term audience development strategy for district institutions	minimal	existing participant budgets	assessment during creation of the long term audience development plan
Business Development and Support (B)			
B.1 Create a near-term business attraction strategy	minimal unless consultants are used	city budget, PDD funds, DPC funds, Dept. of Econ. Dev. programs	successful attraction of new businesses to the Arts District
B.1.1 establish improved communications and coordination of business development efforts in the Arts District	no cost	none required	improved relations, successful business attraction to the district
B.1.2 encourage use of established programs of training and assistance for start-up businesses	minimal unless consultants are used	city budget, DPC funds, Dept. of Econ. Dev. programs	successful attraction and retention of new ventures to the Arts District

Figure V.4 The Near-term Plan: Funding and Evaluation (cont.)

Artists' Concerns (A)	Funding Required	Sources of Funds	Evaluation Technique
<p>A.1 Support pilot projects for artist-owned housing and other spaces</p>	<p>\$5,000 consultation budget</p>	<p>city budget, Dept. of Comm. Dev., private real estate development contracts, corporate sponsors, private philanthropy</p>	<p>successful development of local pilot projects</p>
<p>A.2. Create a program of training and assistance for artists as businesses</p>	<p>minimal unless consultants are used</p>	<p>city budget, Dept. of Econ. Dev., local business sponsors, private philanthropy</p>	<p>improved economic success of participating artists</p>
<p>Community-wide Cultural Activities (C)</p>			
<p>C.1 Complete the Community Cultural Plan</p>	<p>\$60,000</p>	<p>city funds, NEA, Maine Arts Commission, corporate sponsors, private philanthropy</p>	<p>success of the recommended initiatives over time</p>

SECTION VI. THE LONGER-TERM PLAN: THE ARTS DISTRICT THROUGH 2005

This final Section of the Report presents the plan for the arts district over the longer term – a period eight to ten years from the present. It follows the same organizational scheme used to prepare the Near-term Development Plan.

IMPORTANT FEATURES OF THE LONGER-TERM DEVELOPMENT PLAN

Where the Near-term plan emphasizes rapid start-ups for programs and minimal operational overhead and expense, the Longer-term Plan stresses careful planning and long term execution of strategies. Short-term strategies for audience development, business attraction and improvement of the physical environment are replaced by multi-year, fully developed master plans.

While the major focus remains the development of the Arts District's image and promotion of its constituents, greater emphasis is placed on capital improvements, especially the potential for developing additional cultural facilities, in the later years of the plan.

Finally, the Arts District Interim Group, a key element of the implementation strategy for the Near-term Plan, is replaced by the Portland Arts and Cultural Alliance (PACA) as the designated arts development agency for the Arts District.

THE ELEMENTS OF THE LONGER-TERM DEVELOPMENT PLAN

The elements of the Longer-term Plan are presented in Figure VI.1, following the same hierarchical numbering system used in Section V.

As with the Near-term Plan, it should be remembered that, although the initiatives follow the hierarchical scheme, they are closely interrelated with other plan elements. The interrelationships between plan elements are illustrated in Figure VI.2. To read this Figure, remember that the capital letters in the right hand columns refer to the categories that are used to organize the plan.

Figure VI.1 Overview of the Elements of the Longer-term Development Plan

The Physical District (P)

P.2 Develop and execute a comprehensive urban design plan for the District

P.2.1 secure city and other funding for longer-term Arts District improvements

Arts Development, Functions and Programs(D)

D.2 Formally transfer Arts District development and arts programs and functions to PACA

D.2.1 continue and expand outdoor events and other programming in the Arts District

D.2.2 secure city and other funding for Arts District functions and programming

D.3 Create a long term marketing plan for the Arts District

D.4 Formally investigate the feasibility of new cultural facilities

D.4.1 assist in the development of new cultural facilities as justified

Cultural Institution Development and Support (I)

I.2 Develop and execute a longer-term audience development plan for Arts District institutions

Business Development and Support (B)

B.2 continue to update the established business attraction, stabilization and retention plan with a longer-term emphasis

B.2.1 implement the initiatives of the business attraction, stabilization and retention plan with a longer-term emphasis

Artists' Concerns (A)

A.3 Develop a longer term artists' living/working space plan

Community-wide Cultural Activities (C)

C.2 Complete a strategic plan for PACA

C.2.1 secure city and other funding for PACA

Figure VI.2 The Longer-term Plan Elements and Their Interrelationships

Plan Element	P	D	I	B	A	C
The Physical District (P)						
P.2 Develop and execute a comprehensive urban design plan for the District	●	●	●	●		
P.2.1 secure city and other funding for longer-term Arts District improvements	●	●	●	●		
Arts Development, Functions and Programs(D)						
D.2 formally transfer Arts District development and arts programs and functions to PACA		●				●
D.2.1 continue and expand outdoor events and other programming in the Arts District	●	●	●	●	●	
D.2.2 secure city and other funding for district functions and programming	●	●	●	●	●	
D.3 Create a long term marketing plan for the Arts District	●	●		●		
D.4 Formally investigate the feasibility of new cultural facilities	●	●	●		●	●
D.4.1 assist in the development of new cultural facilities as justified	●	●	●		●	●
Cultural Institution Development and Support (I)						
I.2 Develop and execute a longer-term audience development plan for Arts District institutions		●	●			●

Figure VI.2 The Longer-term Plan Elements and Their Interrelationships (cont.)

Business Development and Support (B)	P	D	I	B	A	C
B.2 Continue to update the established business attraction, stabilization and retention plan with a longer-term emphasis	●	●		●	●	
B.2.1 implement the initiatives of the business attraction, stabilization and retention plan with a longer-term emphasis		●		●	●	
Artists' Concerns (A)						
A.3 Develop a longer term artists' living/working space plan		●			●	●
Community-wide Cultural Activities (C)						
C.2 Complete a strategic plan for PACA		●	●		●	●
C.2.1 secure city and other funding for PACA		●	●		●	●

- P = The Physical District
- D = Management, Functions and Programs
- I = Cultural Institution Development and Support
- B = Business Development and Support
- A = Artists Concerns
- C = Community-wide Cultural Activities

DESCRIPTIONS OF THE PLAN ELEMENTS

Each element of the plan is described below. The descriptions follow the same format as that used for the Near-term Development Plan in Section V of this Report.

The Physical District

P.2 develop and execute a comprehensive urban design plan for the Arts District

<i>Recommendation:</i>	III.12
<i>Intent of the initiative:</i>	create a comprehensive, multi-year urban design master plan for the Arts District
<i>Lead agency:</i>	Department of Planning, PACA, PDD
<i>Other groups involved:</i>	Arts District businesses, designers and consultants, Dept. of Public Works, Uptown & Co.
<i>Timing</i>	<i>begin:</i> within 18 - 24 months of endorsement of the plan
	<i>complete:</i> 1 year
<i>Cost of the initiative:</i>	\$30,000
<i>Sources of funding:</i>	city budget, PDD funds, PACA funds
<i>Evaluation technique:</i>	growth of pedestrian uses and total visitation over time, user comments

P.2.1 secure city and other funding for longer-term Arts District improvements

<i>Recommendation:</i>	III.12
<i>Intent of the initiative:</i>	fund the implementation of the urban design master plan
<i>Lead agency:</i>	Department of Planning
<i>Other groups involved:</i>	PACA, Arts District businesses, PDD, designers
<i>Timing</i>	<i>begin:</i> upon completion of the urban design plan
	<i>complete:</i> when the plan is completely implemented

Cost of the initiative: determined by the improvements required

Sources of funding: City budget (CIP, HCD) and other sources

Evaluation technique: growth of pedestrian uses and total visitation over time, user comments

Arts District Development, Functions and Programs

D.2 formally transfer Arts District development and arts programs and functions to PACA

Recommendation: III.8, III.9

Intent of the initiative: transfer the arts development responsibility for the Arts District to PACA through contracts with the city

Lead agency: City Council, Dept. of Planning, PACA

Other groups involved: all Arts District participants

Timing *begin:* upon development of contracts with PACA (target date: 12 - 18 months)

complete: continues indefinitely

Cost of the initiative: legal fees and the contract fees paid to PACA

Sources of funding: city funds

Evaluation technique: successful continuation of ongoing initiatives and future successful direction of the Arts District

D.2.1 continue and expand outdoor events and other programming in the Arts District

Recommendation: III.11

Intent of the initiative: provide attractive programs for a wide variety of Arts District visitors and continue the promotion of the Arts District

Lead agency: PACA

Other groups involved: local artists, Arts District arts institutions, PDD, local arts presenters, other Arts District participants, Uptown & Co.

Timing *begin:* continuing from the Near-term Plan
 complete: continues indefinitely

Cost of the initiative: target budget \$40,000 City funding matched by approx. \$60,000 in private and in-kind contributions

Sources of funding: city budget, PACA budget, corporate contributions, private philanthropy, PDD, Arts District participants

Evaluation technique: impact on foot traffic volume, increases of business volume and attendance at events, response of critics

D.2.2 secure city and other funding for Arts District arts functions and programming

Recommendation: III.11, all others requiring funding

Intent of the initiative: to continue funding for Arts District arts programs and initiatives

Lead agency: PACA

Other groups involved: City Council and staff, all Arts District participants

Timing *begin:* as required to support programs and initiatives
 complete: continues indefinitely

Cost of the initiative: in the range of \$100,000, depending on the cost of other Arts District initiatives

Sources of funding: PACA, City budget, other sources

Evaluation technique: success in funding Arts District initiatives

D.3 create a long term marketing plan for the Arts District

Recommendation: III.12, III.14
Intent of the initiative: to develop a sophisticated, long-term strategic marketing plan that focuses on underdeveloped market segments, including tourists and visitors and expanding cross-over consumption
Lead agency: PACA
Other groups involved: Arts District institutions, Arts District businesses, Dept. of Economic Development, PDD, consultants, survey researchers
Timing *begin:* within 12 - 18 months of endorsement of the plan
 complete: 10 months
Cost of the initiative: \$15,000 City funds to be matched by \$10,000 - 15,000 from other sources
Sources of funding: city budget, PACA budget, Arts District participants
Evaluation technique: development of business volume and visitation

D.4 formally investigate the feasibility of new cultural facilities

Recommendation: III.24
Intent of the initiative: provide formal assessments of the feasibility of any proposed new cultural facilities in the Arts District, assign priorities to cultural facility development
Lead agency: PACA
Other groups involved: interested cultural institutions, Dept. of Economic Development and its Division, the DPC, Planning Department, consultants
Timing *begin:* as proposals and opportunities arise
 complete: 6 - 8 months per project
Cost of the initiative: depends on the scope of the proposed project

Sources of funding: PACA budget, partner cultural institutions, city budget, DPC funds, corporate and private philanthropy
Evaluation technique: success at bringing viable projects to execution

D.4.1 assist in the development of new cultural facilities as justified

Recommendation: III.24
Intent of the initiative: provide technical and financial assistance for the development of new cultural facilities in the Arts District, as justified by feasibility studies and priority
Lead agency: DPC
Other groups involved: PACA, interested cultural institutions, Planning Department, consultants
Timing *begin:* as proposals and opportunities arise
 complete: continues through the development of the project
Cost of the initiative: technical assistance carries minimal cost, capital contributions could be substantial
Sources of funding: DPC funds, PACA budget, partner cultural institutions, city budget, corporate and private philanthropy
Evaluation technique: development of successful cultural facilities

Cultural Institution Development and Support

I.2 develop and execute a longer-term audience development plan for Arts District institutions

Recommendation: III.14
Intent of the initiative: to develop a sophisticated, long-term audience development plan that focuses on joint marketing, business-related promotions and seasonal groups
Lead agency: PACA

Other groups involved: Arts District arts institutions, Arts District businesses, PDD, consultants
Timing *begin:* as soon as possible following transfer of development responsibilities to PACA
 complete: 6 to 8 months
Cost of the initiative: \$15,000 City funding to be matched by \$10,000 - 15,000 from other sources
Sources of funding: PACA budget, city funds, Arts District cultural institutions, PDD funds
Evaluation technique: development of new audience segments and higher attendance over time

Business Development and Support

B.2 continue to update the established business attraction, stabilization and retention plan with a longer-term emphasis

Recommendation: III.16
Intent of the initiative: continue to update the plan for attraction, stabilization and retention of new businesses to the Arts District emphasizing longer term goals
Lead agency: Department of Economic Development and its Division, the DPC
Other groups involved: PACA, Arts District businesses, PDD, consultants, educational institution partners
Timing *begin:* within 18 months of endorsement of the plan
 complete: 8 to 10 months
Cost of the initiative: none unless consultants are used
Sources of funding: city budget, PDD funds, PDC funds, Department of Economic Development programs
Evaluation technique: successful attraction and retention of new businesses to the Arts District

B.2.1 implement the initiatives of the business attraction, stabilization and retention plan with a longer-term emphasis

<i>Recommendation:</i>	III.16
<i>Intent of the initiative:</i>	to establish market positioning for the Arts District in the longer-term
<i>Lead agency:</i>	Department of Economic Development and its Division, the DPC
<i>Other groups involved:</i>	PACA, Arts District businesses, PDD, consultants
<i>Timing</i>	<i>begin:</i> continuing following adoption of the business attraction plan and the long term marketing plan for the Arts District
	<i>complete:</i> 3 to 5 years
<i>Cost of the initiative:</i>	determined by specific plans
<i>Sources of funding:</i>	city budget, PACA budget, PDC funds, Department of Economic Development programs
<i>Evaluation technique:</i>	successful attraction and retention of new businesses, growth of business volume, customer surveys

Artists' Concerns

A.3 Develop a longer term artists' living/working space plan

<i>Recommendation:</i>	III.21
<i>Intent of the initiative:</i>	to create a formal plan for the permanent establishment of artists in the Arts District, through residential and working space development based on proven local models
<i>Lead agency:</i>	PACA
<i>Other groups involved:</i>	local artists, local property owners, Department of Community Development, consultants
<i>Timing</i>	<i>begin:</i> with successful completion of one or more pilot projects
	<i>complete:</i> 10 to 12 months
<i>Cost of the initiative:</i>	minimal unless consultants are used

Sources of funding: PACA budget, city budget, Department of Community Development programs, corporate sponsors, private philanthropy
Evaluation technique: successful development of future projects for artists

Community-wide Cultural Activities

C.2 Complete a strategic plan for PACA

Recommendation: III.26
Intent of the initiative: to complete a long range strategic plan for PACA that specifies functions, funding and structure of the organization
Lead agency: PACA
Other groups involved: all arts institutions, artists and interested institutions and citizens, consultants
Timing *begin:* upon adoption of the Arts District plan
 complete: 10 to 12 months
Cost of the initiative: \$15,000 City funding to be matched by \$10,000 - 25,000 from other sources
Sources of funding: PACA budget, city funds, National Endowment for the Arts programs, corporate sponsors, private philanthropy
Evaluation technique: success of the agency over time

C.2.1 secure city and other funding for PACA

Recommendation: III.26
Intent of the initiative: to establish a funding base for PACA operations
Lead agency: PACA
Other groups involved: all arts institutions, artists and interested institutions and citizens, city officials

<i>Timing</i>	<i>begin:</i> following completion of the strategic plan for PACA
	<i>complete:</i> continuing
<i>Cost of the initiative:</i>	based on program requirements
<i>Sources of funding:</i>	PACA
<i>Evaluation technique:</i>	success of the agency over time

SUMMARY: THE LONGER-TERM PLAN

The descriptions of the plan elements are summarized in two figures presented on the following pages. Figure VI.3 presents a summary of the lead agency, other groups involved and timing for each of the plan initiatives. In Figure VI.4, the funds required, sources of funding and evaluation techniques are presented. Figure VI.5 provides a summary of the relationship of all of the Near-term and Longer-term Plans' initiatives in relation to the goals and objectives recommended for the Arts District.

Figure VI.3 The Longer-term Plan: Leadership and Timing

Plan Element	Lead Agency	Other Key Players	Element Start-up
The Physical District (P)			
<p>P.2 Develop and execute a comprehensive urban design plan for the District</p>	Department of Planning, PACA, PDD	Arts District businesses, designers and consultants, Dept. of Public Works, Uptown & Co.	within 18 - 24 months
<p>P.2.1 secure city and other funding for longer-term Arts District improvements</p>	Department of Planning	PACA, Arts District businesses, PDD, designers	upon completion of the urban design plan
Arts Development, Functions and Programs(D)			
<p>D.2 Formally transfer Arts District development and arts programs and functions to PACA</p>	City Council, Dept. of Planning, PACA	all Arts District participants	target date: 12-18 months
<p>D.2.1 continue and expand outdoor events and other programming in the Arts District</p>	PACA	local artists, Arts District cultural institutions, local arts presenters, other Arts District participants, Uptown & Co.	continuing from the Near-term Plan
<p>D.2.2 secure city and other funding for district functions and programming</p>	PACA	City Council and staff, all Arts District participants	as required
<p>D.3 Create a long term marketing plan for the Arts District</p>	PACA	Arts District institutions, Arts District businesses, Dept. of Econ. Dev., PDD, consultants, survey researchers	within 12 - 18 months
<p>D.4 Formally investigate the feasibility of new cultural facilities</p>	PACA	interested cultural institutions, Dept. of Econ. Dev. and DPC, Planning Department, consultants	as proposals and opportunities arise

Figure VI.3 The Longer-term Plan: Leadership and Timing (cont.)

	Lead Agency	Other Key Players	Element Start-up
D.4.1 assist in the development of new cultural facilities as justified	DPC	PACA, interested cultural institutions, Planning Department, consultants	as proposals and opportunities arise
Cultural Institution Development and Support (I)			
I.2 Develop and execute a longer-term audience development plan for Arts District institutions	PACA	Arts District arts institutions, Arts District businesses, PDD, consultants	following transfer of development responsibility to PACA
Business Development and Support (B)			
B.2 continue to update the established business attraction, stabilization and retention plan with a longer-term emphasis	Dept. of Econ. Dev. and its Division, the PDC	PACA, Arts District businesses, PDD, consultants, educational institution partners	within 18 months
B.2.1 implement the initiatives of the business attraction, stabilization and retention plan with a longer-term emphasis	Dept. of Econ. Dev. and its Division, the PDC	PACA, Arts District businesses, PDD	3 to 5 years
Artists' Concerns (A)			
A.3 Develop a longer term artists' living/working space plan	PACA	local artists, local property owners, Dept. of Comm. Dev., consultants	with successful completion of one or more pilot projects

Figure VI.3 The Longer-term Plan: Leadership and Timing (cont.)

Community-wide Cultural Activities (C)	Lead Agency	Other Key Players	Element Start-up
C.2 Complete a strategic plan for PACA	PACA	all arts institutions, artists and interested institutions and citizens, consultants	upon adoption of the Arts District plan
C.2.1 secure city and other funding for PACA	PACA	all arts institutions, artists and interested institutions and citizens, city officials	following completion of the Strategic Plan for PACA

Figure VI.4: The Longer-term Plan: Funding and Evaluation			
Plan Element	Funding Required	Sources of Funds	Evaluation Technique
The Physical District (P)			
P.2 Develop and execute a comprehensive urban design plan for the District	\$30,000	city budget, PDD funds, PACA funds	growth of pedestrian uses and total visitation over time, user comments
P.2.1 secure city and other funding for longer-term Arts District improvements	determined by the improvements required	City budget (CIP, HCD), other sources	growth of pedestrian uses and total visitation over time, user comments
Arts Development, Functions and Programs(D)			
D.2 Formally transfer Arts District development and arts programs and functions to PACA	legal fees and the management fees paid to PACA	city funds	successful ongoing initiatives and successful direction of the Arts District
D.2.1 continue and expand outdoor events and other programming in the Arts District	\$40,000 city funding to be matched by approx. \$60,000 from other sources	city budget, PACA budget, corp. contributions, private philanthropy, PDD, Arts District participants	impact on foot traffic volume, increases of business volume and attendance at events, response of critics
D.2.2 secure city and other funding for district functions and programming	in the range of \$100,000	PACA, City budget, other sources	success in funding Arts District initiatives

Figure VI.4: The Longer-term Plan: Funding and Evaluation (cont.)

	Funding Required	Sources of Funds	Evaluation Technique
D.3 Create a long term marketing plan for the Arts District	\$15,000 City funds to be matched by \$10,000 - 15,000 from other sources	city budget, PACA budget, Arts District participants	development of business volume and visitation
D.4 Formally investigate the feasibility of new cultural facilities	depends on the scope of the proposed project	PACA budget, partner cultural institutions, city budget, PDC funds, corp. and private philanthropy	success at bringing viable projects to execution
D.4.1 assist in the development of new cultural facilities as justified	minimal, capital contributions could be substantial	PACA budget, partner cultural institutions, city budget, DPC funds, corp. and private philanthropy	development of successful facilities
Cultural Institution Development and Support (I)			
I.2 Develop and execute a longer-term audience development plan for Arts District institutions	\$15,000 City funds to be matched by \$10,000 - 15,000 from other sources	PACA budget, city funds, arts Arts District cultural institutions, PDD funds	development of new audience segments and higher attendance over time
Business Development and Support (B)			
B.2 Continue to update the established business attraction, stabilization and retention plan with a longer-term emphasis	none unless consultants are used	city budget, PDD funds, PDC funds, Dept. of Econ. Dev. programs	successful attraction and retention of new businesses to the Arts District

Figure VI.4: The Longer-term Plan: Funding and Evaluation (cont.)

	Funding Required	Sources of Funds	Evaluation Technique
B.2.1 implement the initiatives of the business attraction, stabilization and retention plan with a longer-term emphasis	determined by specific plans	city budget, PACA, PDC funds, Dept. of Econ. Dev. programs	successful attraction and retention of new businesses, growth of business volume, customer surveys
Artists' Concerns (A)			
A.3 Develop a longer term artists' living/working space plan	minimal unless consultants are used, budget	PACA budget, city budget, Dept. of Comm. Dev., corp. sponsors, private philanthropy	successful development of future projects for artists
Community-wide Cultural Activities (C)			
C.2 Complete a strategic plan for PACA	\$15,000 City funds to be matched by \$10,000 - 25,000 from other sources	PACA budget, city funds, NEA, state programs, corp. sponsors, private philanthropy	success of the agency over time
C.2.1 secure city and other funding for PACA	based on program requirements	PACA	success of the agency over time

Figure VI.5 How the Plan Responds to the Goals for the Arts District

Goal	Plan Elements that Respond to the Goal
To improve the economic performance of arts institutions in the Arts District and throughout the city by...	
• increasing attendance,	I.1, I.2, D.1.2-D1.5, D.2, D.3, P.1, P.2, B.1.1, C.1, C.2
• supporting efforts to develop subscribers, stabilize audiences and develop audience base,	I.1, I.2, D.1.2-D1.6, D.2, D.3, P.1, P.2, B.1.1, C.1, C.2
• improving marketing communications,	I.1, I.2, D.1.6, D.3, B.1.1, B.2.1
• supporting better integration of arts institutions with the other major downtown interests, and	B.1, B.2.1
• encouraging arts-related businesses to establish in, or relocate to the Arts District.	B.1-B.2.1
To enhance the economic impact of arts institutions in the city by...	
• providing opportunities for expanded spending for goods and entertainment associated with arts attendance at museums, galleries, and performing arts events,	I.1, I.2, D.1.6, D.3, B.1-B.2.1
• extending the length of stay for all visitors in the downtown, and	I.1, I.2, D.1.2-1.4, D.2.1, D.3, B.1-B.2.1
• increasing the overall attractiveness of the city for tourists.	I.1, I.2, D.1-D.4.1, B.2.1
To create a more favorable business climate in the District and in downtown Portland by...	
• increasing pedestrian activity and total visitorship to the downtown,	P.1, P.1.1, P.2-P2.1, D.1.2-D.1.7, D.2.1, D.3, D.4.1, I.1, I.2, B.1, B.1.1, B.2.1
• improving the appearance and the occupancy rate of commercial properties in the Congress Street corridor,	P.1-P.2.1, B.1-B.2.1, D.1.4, D.3
• working in partnership to collaborate with the other marketing and programming entities operating in downtown Portland	D.1.5, D.3, B.1.1, B.1.2, B.2.1
• assuring that the activities of the Arts District are complementary to other efforts in the city.	D.1.5, D.3, B.1.1, B.2.1, I.1, I.2, C.1, C.2

Figure VI.5 How the Plan Responds to the Goals for the Arts District (cont.)

Goal	Plan Elements that Respond to the Goal
<p>To support the creative efforts of individual artists by...</p> <ul style="list-style-type: none"> • providing a larger audience for their work, • raising their visibility in the community, and • providing more affordable and stable living and working spaces for artists within the Arts District. 	<p>D.1.2-D.1.7, D.2.1, D.3, D.4.1, A.2, C.1, C.2 D.1.2-D.1.7, D.2.1, D.3, D.4.1, A.2, C.1, C.2 A.1, A.3, C.1, C.2</p>
<p>To contribute to the overall quality of life in the community by...</p> <ul style="list-style-type: none"> • providing an array of arts and entertainment options for a broad cross section of the resident population, • fostering healthier arts institutions, • providing programs in public spaces, and • improving communications about available programs. 	<p>D.1.2-D.1.6, D.2.1, D.3, D.4.1, I.1, I.2, C.2, A.2 I.1, I.2, D.1.5, D.3, D.4, D.4.1, C.1, C.2 D.1.3, D.1.6, D.2.1 D.1.5, D.3, B.1.1, B.2.1, I.1, I.2, C.1, C.2</p>
<p>To establish an Arts District that is a permanent feature of downtown Portland by...</p> <ul style="list-style-type: none"> • creating a recognizable physical focus for downtown arts programming, • safeguarding the continued availability of performance venues, studios, artist housing and other key properties, and • providing for stable direction and funding for the Arts District. 	<p>P.1, P.1.2, P.2, D.1.3, D.2.1, D.4.1 P.1-P.2.1 D.1, D.1.1, D.1.6, D.2, C.1, C.2, C.2.1</p>
<p>To build community trust and collaboration of diverse groups by...</p> <ul style="list-style-type: none"> • offering opportunities to inform, share experiences and transcend differences through art... • offering outlets for creative expression for members of Portland's population who are disconnected from the underlying social and economic fabric... • providing a common setting at public outdoor activities and events for mixing of people who do not otherwise have opportunities for positive interaction... 	<p>D.1.3, D.1.4-D1.7, D.2.1, D.2.2, D.3, D.4, D.4.1 D.1.3, D.1.4-D1.7, D.2.1, D.2.2, D.3, D.4, D.4.1 D.1.3, D.1.4-D1.7, D.2.1, D.2.2, D.3, D.4, D.4.1</p>

Appendix A. List of Interviewees

The following individuals were interviewed during the fact finding for the project. All titles are for identification purposes only and were current at the time of contact.

<i>Judith Adam</i>	Executive Director, Portland Concert Association
<i>Mark Adelson</i>	Community Development Administrator, Department of Community Development
<i>David Agan</i>	Director of Refugee Resettlement, Catholic Charities of Maine
<i>Jim Ahearn</i>	Whirly Gigs Productions
<i>Gretchen Berg</i>	Berg/Sarvis Modern Dance Company
<i>Susan Bergier</i>	Owner, Amaryllis
<i>Ted Bernard</i>	Vice-President, UNUM, Congress Street Advisory Committee
<i>Kathleen Brown</i>	Assistant Director, Department of Economic Development
<i>Russell I. Burleigh</i>	Executive Director, Friends of the Kotschmar Memorial Organ

APPENDIX A. LIST OF INTERVIEWEES

<i>Penny Carson</i>	Real Estate Broker and Property Owner
<i>William Chance</i>	Executive Director, Portland Stage Company
<i>Kris Clark</i>	Concert Promoter
<i>Huey Coleman</i>	Executive Director, Maine Alliance of Media Arts
<i>Susan Cooper</i>	Deputy Director, Portland Downtown District
<i>Maddy Corson</i>	President of the Board, Guy Gannett Communications
<i>Steven Crane</i>	General Manager, The Cumberland County Civic Center
<i>Dan Crewe</i>	Former Partner, Gateway Mastering Studios
<i>Wayne Curtis</i>	Editor, Casco Bay Weekly
<i>Richard D'Abate</i>	Associate Director, Maine Humanities Council; President, Board of Directors, Portland Performing Arts
<i>Orlando Delogue</i>	City Councilor, District 2
<i>Martha DePrez</i>	Executive Director, Greater Portland Landmarks
<i>Bill Doughty</i>	Director of Curriculum and Assessment, Portland School System
<i>Pricilla Dreyman</i>	Executive Director, Spiral Arts, Inc.
<i>Annette Elowich</i>	Collector; Co-Owner, Baridoff Gallery
<i>Rob Elowich</i>	Collector; Co-Owner, Baridoff Gallery
<i>June Fitzpatrick</i>	Owner, The June Fitzpatrick Gallery
<i>Tim Follo</i>	Owner, Raffles Bookstore
<i>Robert B. Ganley</i>	City Manager
<i>Bruce Gensmer</i>	President, The Portland Newspapers
<i>Roger Gilmore</i>	President, Maine College of Art
<i>Peggy Golden</i>	Owner, Greenhut Gallery, Public Arts Committee
<i>Sarah Goodyear</i>	Arts Editor, Casco Bay Weekly

<i>Bau Graves</i>	Artistic Director, Portland Performing Arts, Inc.
<i>Kelly Graves</i>	Executive Director, State Theatre
<i>Barbara Hagar</i>	Executive Director, Portland's Downtown District
<i>Debbie Hammond</i>	Director of Development and Marketing, Portland Symphony Orchestra
<i>Lindsey Hancock</i>	Painter; Executive Director, Figures of Speech Theatre, Board Member, Portland Stage Company
<i>Burl Hash</i>	Executive Director, Maine Arts, Inc.
<i>Jane Hunter</i>	Executive Director, Portland Symphony Orchestra
<i>Sheldon Kaye</i>	Executive Director, The Portland Public Library
<i>Gina Kelley</i>	Professor of Sculpture, Maine College of Art
<i>Susan Kumiszczka</i>	Director of Corporate Development, Chamber of Commerce
<i>Pandora LaCasse</i>	Member, Portland School Committee; Portland Partnership
<i>Nancy Lawrence</i>	business owner, OPRA member
<i>Margaret Lawson</i>	Minister, AME Zion Church
<i>Mike Levine</i>	Executive Director, Oak Street Theater
<i>C. Michael Lewis</i>	Painter, Graphic Designer
<i>Gail Ludwig</i>	Partner, Gateway Mastering Studio
<i>Janine Manning</i>	Executive Director, UNUM Charitable Foundation
<i>Elizabeth J. Miller</i>	Executive Director, Maine Historical Society
<i>Richard Molyneaux</i>	President, Key Bank
<i>Christopher Moore</i>	Musician
<i>George Neavoll</i>	Editorial Page Editor, The Portland Newspapers
<i>Eugenia O'Brien</i>	Executive Director, Portland Ballet
<i>Peter O'Donell</i>	Executive Director, Portland West Neighborhood Planning Council

APPENDIX A. LIST OF INTERVIEWEES

<i>Dan O'Leary</i>	Executive Director, Portland Museum of Art
<i>Phyllis O'Neill</i>	Executive Director, Portland Performing Arts, Inc.
<i>Richard Paulson</i>	Former Mayor, City of Portland
<i>James Pinfold</i>	Manager, Amadeus Music
<i>Pam Plumb</i>	Former Mayor, former City Council Member
<i>Peter Plumb</i>	Member, Maine Arts High School Task Force, Board Member, Portland Symphony Orchestra
<i>Anne Pringle</i>	Former Mayor, former City Council Member
<i>Michael Rafkin</i>	Executive Director, Mad Horse Theatre
<i>Sonia Robertson</i>	business owner, OPRA member
<i>Rob Rosenthal</i>	Station Manager, WMPG-FM, University of Southern Maine
<i>Johnnie Ross</i>	Professor of Painting and Design, Maine College of Art
<i>Terri Rouse</i>	Executive Director, The Children's Museum of Maine
<i>Paul Sarvis</i>	Berg/Sarvis Modern Dance Company
<i>Laurie T. Schell</i>	Director of Education, Portland Symphony Orchestra; Co-Chair, Arts and Education Committee, Portland Partnership
<i>Winton Scott</i>	Principal, Winton Scott Architects
<i>James Shaeffer</i>	Chief Executive Officer, Guy Gannett Communications
<i>Marjorie Shaw</i>	Co-Editor, <i>Kids Cultural Horizons</i> ; Member, Arts and Education Committee, Portland Partnership
<i>Toshi Shimada</i>	Musician, Portland Symphony Orchestra
<i>Sue Shuer</i>	Director of Administration, Chamber of Commerce
<i>Joan Fowler Smith</i>	Vice-President, Administrative and External Affairs, Maine College of Art

<i>Alice Spencer</i>	Painter, Printmaker
<i>Anne Stein</i>	Owner, Stein Gallery, OPRA member
<i>Deidre Steinar</i>	Principal, Adams School
<i>Fred Thompson</i>	Owner, WCSH-TV
<i>Angus Twombly,</i>	Vice-President of Marketing, The Portland Newspapers
<i>Joe Van Why</i>	Owner, Eastland Plaza Hotel
<i>David Webster</i>	Executive Director, Very Special Arts/Maine
<i>Katarina Weslien</i>	Artist
<i>Michael Wingfield</i>	Performing Artist
<i>Jay York</i>	Photographer; Owner, Affordable Photo, Inc.

APPENDIX B. VISION STATEMENT FROM THE DOWNTOWN VISION PLAN

The Downtown Vision plan is a component of the Comprehensive Plan adopted by the City Council in March, 1991. It is formally described in a document entitled *Downtown Vision: A Celebration of Urban Living and a Plan for the Future of Portland – Maine's Center for Commerce and Culture*. The plan contains an extensive vision statement for downtown Portland that is reproduced below.

THE VISION

Our vision of the Downtown for this and future generations is an expression of belief that the Downtown can and will retain its livability and, by encouraging appropriate development and by nurturing opportunities, will become an even better and more attractive place to live, work, visit and find employment.

WE ENVISION DOWNTOWN PORTLAND AS MAINE'S
CENTER FOR COMMERCE AND CULTURE

A Downtown for People...

...where people of all ages and all socio-economic groups find an exciting, friendly and compassionate atmosphere within the stores, offices and cultural facilities, as well as on the sidewalks and open spaces throughout the Downtown; and where people want and are encouraged to come together.

A Downtown of Opportunity...

...where a bustling office and retail economy combined with a thriving and diverse cultural, entertainment, and visitor economy to provide a prosperity shared by the entire community; and where opportunities abound for expanding existing or creating new businesses, for finding jobs, for securing adequate housing and satisfying needs for goods and services, for finding diversion and entertainment, and for influencing community policies and programs.

A Beautiful and Rich Downtown...

... where the character of the physical environment - Downtown buildings, open spaces, and pedestrian areas - is of the highest quality of design and detail; where a strong sense of the history and traditions reflected in past development inspires and guides contemporary design and where the physical environment is always being tended and enhanced.

A Progressive and Active Community...

... where leadership and sense of collective mission produce affirmative actions to promote growth, Downtown character, and quality of life; where decisions and directions support a community vision, yet where individual initiative is encouraged and supported; and where the community is in control and has the will and ability to create a positive City experience in which we can all share and enjoy.

A Downtown which Celebrates...

... where all people come together day-to-day as well as on special occasions to participate in urban events in CELEBRATION of the excitement of life Downtown.

OVERALL GOALS

1. To preserve and enhance the livability and walkability of Downtown Portland for residents, workers, shoppers, and visitors.
2. To maintain and enhance the Downtown's prominence as the regional center for commerce, human services, historic resources, culture and the arts.
3. To encourage growth and development Downtown while preserving and strengthening the unique identity and character of the Downtown.
4. To achieve diversity in the Downtown's economy, in activities, uses, and participants.
5. To achieve the highest quality urban experience through high standards of excellence for improvements to the physical environment, including new construction, building alterations, and the enhancement of the pedestrian environment.
6. To preserve and enhance the quality and vitality of neighborhoods within and adjacent to the Downtown.
7. To accommodate ingress to and egress from the Downtown with a maximum efficiency and minimum of vehicular congestion, while maintaining a favorable pedestrian environment.
8. To manage traffic and parking to diminish and decentralize the concentration of private automobiles in the heart of the Downtown through a creative combination of on-street, on-site, central garage, and peripheral parking, and alternative transportation mode solutions.

9. To encourage innovative plans within the Downtown which can respond to changing market conditions and which can help achieve other goals.

HERBERTSROUSECONSULTING

Supplement I:
A Study of Portland's
Arts Audience

July, 1995

Prepared for the Arts and Cultural
Steering Committee

by
Herbert W. Sprouse
Herbert Sprouse Consulting

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Supplement I: A Study of Portland's Arts Audience

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APPENDIX S1-A. AUDIENCE SURVEY QUESTIONNAIRE

APPENDIX S1-B. TECHNICAL ANALYSIS OF AUDIENCE POTENTIALS

SUPPLEMENT 1.

A STUDY OF PORTLAND'S ARTS AUDIENCE

Many aspects of cultural planning and the development of the arts district depend on insights into the behavior and interests of the arts audience. This report presents the findings of a detailed survey of residents of the Portland arts market area.

During the months of April and May, 1995, a telephone survey was conducted to develop information on a wide variety of audience activities and attitudes held by citizens of the Portland area. The questionnaire used in the survey is based on instruments designed and tested by the consultant for use in previous studies, allowing for general comparison of the results with those of other areas of the country. The survey instrument was reviewed prior to its administration and approved by an advisory committee including representatives of the Portland Arts Task Force and staff of the City of Portland. A copy of the questionnaire is included as Appendix S1-A of this Report.

The purpose of the survey was threefold:

- To inventory current activities of Portland area residents in terms of attendance at performing arts events, museums and art galleries,

- To determine the opinions of both audience members and non-participants on a variety of issues related to the arts and possible arts program initiatives, and
- To develop projections of future growth in local arts audiences and other data for use in the planning process.

SURVEY METHODOLOGY

The telephone survey was directed toward adult heads of household residing within the primary and extended market areas for arts events and institutions located in Portland. These market areas were determined in consultation with the marketing and administrative staff of several of the larger arts organizations in the community. Generally, they consist of the City of Portland and an extended cluster of contiguous communities.

In the discussion which follows, the two geographic subgroups are described as follows. The "primary market area" refers to residents of Portland and South Portland, Cape Elizabeth, Cumberland, Falmouth and Westbrook.

The "extended market area" includes the communities listed above and adds to the primary area the following communities: Biddeford, Brunswick, Freeport, Gray, Gorham, Harpswell, Kennebunk, Kennebunkport, Long Island, New Gloucester, North Yarmouth, Old Orchard Beach, Pownal, Saco, Scarborough, Windham and Yarmouth. This extended market area definition is a result of the demonstrated ability of local institutions to draw significant audience numbers from those communities.

For use in community cultural planning, the primary market area findings are the most appropriate, especially for those questions that probe familiarity with local institutions or that seek local opinion. For planning the arts district and for understanding the dynamics of marketing the district and the larger arts institutions, the extended market area provides a better picture of the potential audience and its interests.

However, in terms of actual results, there are very few real differences between the responses of the two groups.

A total of 400 interviews were completed by male or female heads of households who were sampled using a rigorous telephone number generation process. Known as a "probability sample," this method assures distribution of the calls across the geographic survey area in a manner consistently reflecting the distribution of population in the region. The telephone calls were distributed across week nights and weekend days and nights to avoid bias resulting from the time of day of the call. The size of the sample and the method of generating the telephone numbers assure a high degree of reliability for the responses. When evaluating the results of the survey, responses should be viewed as being reliable plus or minus four percent.

After initially tabulating the overall results of the survey, the consultant performed extensive cross-tabulations of the data by various characteristics of the survey group. These include such factors as residence within the City of Portland or in the larger market area, whether the respondent was an arts attendee or not (see the description below), the frequency of arts participation for those who do participate, whether subscriptions and memberships to cultural institutions were held, whether children resided in the household, and various other factors.

Qualifying the Respondents

In addition to determining that the respondents were adult heads of household and residents of the market area, a further screening process was added which is very important to the quality of the information collected. Each adult was asked

"During the past 12 months, have you attended any type of performing arts or entertainment event either in Portland or elsewhere, such as a concert, a play, a Broadway show, a dance concert, an opera performance, New Year's Portland or any other popular cultural event for which you or someone else paid for the tickets?"

If the respondent could not answer the question positively, a second question was asked

"Have you visited a museum or an art gallery in Portland or elsewhere in the past 12 months?"

Failure to answer "yes" to either question resulted in the respondent being routed through a shortened version of the questionnaire, eliminating some questions most appropriately answered only by those who have direct experience of local programs and institutions. It is important to differentiate between responses of attenders and non-attenders when projecting the interests and future participation of arts audiences for two reasons.

- First, an important reason for including only arts attenders in the longer form of the survey is found in the nature of some of the questions which are included. Asking questions about such subjects as the quality of events, frequency of attendance, and presence of children in the attending party results, inevitably, in distorted and potentially misleading information when answered by respondents who have no direct personal experience.
- Second, the experience of industry marketing professionals, the academic literature, and of the consultant indicates that adults who do not attend events or institutions of these types are extremely difficult to influence to attend in the future. This means that planning for new programs or facilities generally cannot rely on non-participants for future audience support.

SURVEY RESULTS

The survey results are reported below with interpretive comments and observations. To provide a broader context for the data, the findings of similar surveys conducted by the consultants in other major metropolitan areas have been presented when comparison is relevant. Specifically, results of the consultants' surveys in the Charlotte, North Carolina metropolitan area; Dallas, Texas; the Kansas City metropolitan area; and

the Portland, Oregon metropolitan area are used as points of comparison. While each of these metropolitan areas is considerably more populous than Portland, the unusually broad range of cultural institutions and events in Portland makes it directly comparable to larger cities in many ways. Taken as a group, these cities provide a useful frame of reference for the Portland area findings.

Current Attendance and Participation

In the first section of the interview, the respondents were asked about their attendance at performing arts events, museums and art galleries. The overall participation rates for the sample were reported as follows.

- 50 percent of the Portland primary market area residents reported that they had attended a live performing arts or entertainment event (with a paid admission) in the past 12 months. 49 percent had attended a museum or art gallery during the same period.
- Participation in performing arts attendance is somewhat higher for primary market area residents (50 percent) than for extended market area residents (44 percent.)
- Museum and gallery visitation rates are also slightly higher for primary area residents than for extended market area residents at 49 percent and 43 percent, respectively.

The participation rate findings are summarized in Figure A below.

Figure A: Summary of Arts Participation Rates

	Primary Area Residents	Extended Area Residents
Attendance at a paid performing arts event in the past 12 months	50%	44%
Attendance at a museum or gallery in past 12 months	49%	43%

For the purpose of further analysis, the 208 extended market area residents who already qualified as *performing arts attenders* were further divided into attendance frequency groups as shown below:

- Light Attenders (1-3 events in the past 12 months) 19%
- Medium Attenders (4-6 events) 11%
- Heavy Attenders (7 or more events) 70%

Based on the consultant's studies in other communities, there are relatively fewer light attenders and a relatively greater proportion of heavy attenders in this market area. It should be remembered, however, that in order to qualify as a "Heavy Attender" the respondent had only to report attending a performing arts or entertainment event more frequently than once every other month, on average (seven times per year or more.) Attendance at specific events and institutions was also inventoried in detail, as were preferences for many types of arts programming. These findings are discussed below.

Comparison with the survey results obtained in other metropolitan areas provides some insight into the level of participation in the Portland area. Figure B below presents the participation level results for the Portland extended market area and four other metropolitan areas. Portland's performing arts participation rate is exactly comparable to Dallas and the Kansas City metropolitan area, while somewhat below that of Charlotte and Portland, OR. The local museum and gallery attendance rate is approximately at the mid-point of the group.

Figure B: Comparative Survey Responses in Other Metropolitan Areas: Participation Rates

	Portland extended market area	Charlotte Metro Area	Dallas	Kansas City Metro Area	Portland, OR Metro Area
Attendance at a paid performing arts event in the past 12 months	44%	60%	47%	47%	51%
Attendance at a museum or gallery in past 12 months	43%	52%	45%	not avail.	34%

Attendance Habits: Party Size and Children in Attendance

To help form a better understanding of the dynamics of regional attendance, the survey subjects who were arts attenders were asked about the typical size of their attending party and also about the inclusion of children.

The average size of an attending party at arts events is 3.1 people for the extended market area residents. Parties of primary market area residents average 3.0 people.

In response to the question *"When you attend an arts event, are there ever children under age 18 in your party?"*, 54 percent of the extended market area arts attenders reported that children did accompany them sometimes. They estimated that children join their parties 37 percent of the time, with an average of 1.9 children per party when children are in attendance.

The responses of primary market area residents were very similar. Among arts attenders, 53 percent reported that children sometimes accompany them to events. They are joined by an average of 2.0 children 36 percent of the time.

Figure C below presents a comparison of the key attributes of attending parties in the study area and four other metropolitan areas. The Portland extended market area has the largest average party size overall. The percent of parties that sometime include children is comparable to all of the other metropolitan

areas surveyed and the average number of children in the party is the lowest of the five market areas. Local parties also include children less frequently than do attenders in any of the other metropolitan areas.

Figure C: Comparative Survey Responses in Other Metropolitan Areas: Attendance Habits

	Portland extended market area	Charlotte Metro Area	Dallas	Kansas City Metro Area	Portland, OR Metro Area
Average number in party of arts attenders	3.1	3.2	3.3	3.0	3.1
Percent of parties which sometimes include children	54%	59%	28%	38%	44%
Percent of time children in are in attendance	37%	53%	NA	50%	47%
Average number of children in attendance	1.9	2.3	2.7	2.0	2.1

General Opinions about Cultural Institutions and Programs

Both arts attenders and non-attenders were asked to respond to a series of statements expressing opinions about the state of cultural institutions and programs in the area. The interviewer introduced the question with the statement

“We have heard some comments about the arts in Portland and the city in general, and I am going to read them to you. For each of these comments, please tell me if you strongly agree, agree, disagree, or strongly disagree with the statement.”

A substantial majority of respondents believe that the arts are generally available to all residents of the Portland Area and that the arts are good for the area. They do not feel that the arts in Portland Area are exclusively for the wealthy and they ex-

press a high level of support for public sector funding of the arts.

- Better than eight out of every ten respondents agreed that "The arts are available to all residents, no matter where in the Portland area they live."
- Seventy percent of the respondents agreed or strongly agreed that *"Portland is a much better place to live because of the variety of arts activities going on here."* Not surprisingly, arts activities are more important to the quality of life in the area for arts attenders (81 percent agreed) than to non-attenders (59 percent agreed).
- More than three-quarters did not agree with the statement that *"The arts in Portland are only of interest to the wealthy and well-educated."*
- Approximately 84 percent did not agree that *"There is little diversity of cultural expression in arts programs in Portland."*

A very large number of respondents appear to favor more local government support for the arts and they believe that without such support, the arts of Portland will be in serious jeopardy.

- A substantial three out of every four respondents agreed that *"It's important for the City of Portland government to support artists and arts institutions more actively."* Fully 64 percent of non-attenders agreed with this statement.
- 71 percent agreed that *"Unless City and town governments increase their support for the arts, we may lose some of our cultural institutions and programs."*
- Better than seven out of ten believe that their town government should provide support for arts institutions that serve the region.

Finally, there appears to be a clear understanding of the links between the arts and tourism.

- Better than 83 percent agreed that *"Better promotion of Portland's cultural life could improve tourism in the area."*

Figure D presents the percentage of the respondents who agreed or strongly agreed with each opinion presented, broken into several sub-groups including whether the respondent was an attender or a non-attender.

Barriers to Attendance

Understanding the reasons why people limit their attendance at arts events and institutions is important in developing programs to stimulate attendance and support local facilities. Both attenders and non-attenders were asked to respond to a series of statements describing reasons why their attendance was not more frequent. For each statement, those surveyed were requested to tell the interviewer whether the statement was a major reason, a minor reason, or not a factor at all in their decision not to attend more performing arts events in Portland or the market area.

For all residents of the extended market area who are arts attenders, the major reasons cited as limiting attendance were

- *"Other activities use up all my free time."* (given by 68 percent as a major or minor reason)
- High ticket prices (given by 67 percent)
- Inconvenience and high cost of parking (given by 63 percent)
- A shortage of afternoon and matinee performances (given by 48 percent) and the effects of the weather (47 percent.)

Figure D: Opinions About Cultural Events and Institutions (percent who agree or strongly agree)

	All respondents	Respondents who are Arts Attenders	Respondents who are Non-attenders
1. "The arts are available to all residents, no matter where in the Portland area they live."	83%	84%	83%
2. "Downtown Portland is more interesting and attractive than it was five years ago."	63%	65%	60%
3. "More cultural activities should take place in neighborhoods rather than in downtown Portland."	37%	29%	45%
4. "The arts in Portland are only of interest to the wealthy and well-educated"	22%	24%	20%
5. "I find myself dining out and shopping more often in downtown Portland or the Old Port than I used to."	31%	36%	26%
6. "There is little diversity of cultural expression in arts programs in Portland."	16%	14%	18%
7. "Portland is a much better place to live because of the variety of arts activities going on here."	70%	81%	59%
8. "It's important for the City of Portland government to support artists and arts institutions more actively."	75%	84%	64%
9. "When I think about attending arts and entertainment events, I usually think about going to Boston or other places before I think of Portland."	20%	19%	22%
10. "Better promotion of Portland's cultural life could improve tourism in the area."	83%	84%	82%
11. "Unless City and town governments increase their support for the arts, we may lose some of our cultural institutions and programs."	71%	79%	62%
12. "Portland is a more interesting place to live than most people think."	86%	89%	82%
13. "I think that my town government should provide support for arts institutions that serve the region"	71%	76%	69%
14. "I am more interested in the work of Maine artists than the work of people from away."	35%	29%	42%

Figure E: Reasons for Not Attending More Performing Arts Events ("major" or "minor reason" as reported by both attenders and non-attenders)

	All respondents	Respondents who are Arts Attenders	Respondents who are Non-attenders
1. "The arts groups in Portland don't offer what I want to see."	33%	40%	25%
2. "The quality of the presentations is not high enough"	23%	29%	17%
3. "I don't hear about the events in Portland"	45%	41%	50%
4. "Parking downtown is difficult and expensive"	64%	63%	65%
5. "There are not enough afternoon events and matinees"	39%	48%	33%
6. "Events are held in facilities which are not conveniently located for me to attend."	33%	28%	38%
7. "The ticket prices are too high for me to attend more events."	62%	67%	56%
8. "I don't have anyone to attend events with."	29%	25%	35%
9. "I don't feel safe in downtown Portland."	26%	23%	29%
10. "There aren't enough events in the Arts District"	25%	27%	24%
11. "Downtown Portland closes up too early in the evening"	34%	39%	30%
12. "I don't understand arts events."	22%	17%	26%
13. "I only go to see well-known performers."	34%	32%	36%
14. "Other activities use up all of my free time."	74%	68%	79%
15. "I'm not interested in arts events."	26%	16%	37%
16. "I have trouble getting child care"	21%	17%	25%
17. "The weather sometimes prevents me from attending"	41%	47%	35%

The responses for the attender and non-attender subgroups to this question are summarized in Figure E.

A comparison of arts attenders with those who do not attend reveals attitudes that are similar in most ways. Some differences do exist, however. Fully 67 percent of the attenders cited high ticket prices as a major or minor reason for not attending

more events as compared with 56 percent of the non-attenders. This may be an indication that, for some attenders, the limits of their discretionary income for arts events are being reached. Additionally, considerably more non-attenders (37 percent) than attenders (16 percent) cited a lack of interest as a main reason for not attending more often. The remainder of the significant differences in responses between attenders and non-attenders represent, overall, the lower level of interest that non-attenders have in the various offerings available to them in the area.

Data in Figure F compare the reasons for not attending with those of the respondents of surveys conducted by the consultant in other metropolitan areas. The responses of the Portland extended market area sample group are compared with those of both attenders and non-attenders in Charlotte, Kansas City and Portland, OR for the reasons for not attending which are comparable between all of the surveys. (Data collected in Dallas described only attenders' reasons for not attending and are therefore not comparable.)

- Portland respondents are about as satisfied with the availability of events as are their counterparts in the other metropolitan areas, while they hold approximately the same level of satisfaction with the quality of program offerings.
- Information about events appears to be about as available for Portland residents than for respondents from other areas.
- The Portland extended market area group was at the approximate mid-point in their concern with ticket prices, with 62 percent citing high prices as a major or minor reason for not attending more events. Responses ranged from 57-75 percent on this question.
- Portland extended market area respondents felt considerably safer in their city than did the respondents in other areas. Only 26 percent gave safety concerns as a major or minor reason, compared with 36-47 percent among the others surveyed.

- Portland area respondents (74 percent) cited an almost identical lack of available free time as did the respondents in other communities (72-74 percent) while the number citing a lack of interest in the arts was comparable to those in the other metropolitan areas.

One final point about the answers to these questions should be noted. The answers to these questions are best interpreted in relative terms. For example, it is the consultant's experience that some respondents give high ticket prices or a lack of free time as constraints on their attendance when they simply have no interest in attending more events than they do already.

Figure F: Comparative Survey Responses in Other Metropolitan Areas: Reasons for Not Attending More Performing Arts Events
 ("major" or "minor reason" as reported by both attenders and non-attenders)

	Portland ex- tended market area	Charlotte Metro Area	Kansas City Metro Area	Portland, OR Metro Area
"The arts groups don't offer what I want to see."	33%	40%	38%	33%
"The quality of the presentations is not high enough"	23%	21%	21%	16%
"I don't hear about the events in ..."	45%	53%	48%	46%
"The ticket prices are too high for me to attend more events."	62%	57%	66%	75%
"I don't feel safe in ..."	26%	45%	47%	36%
"Other activities use up all of my free time."	74%	74%	73%	72%
"I'm not interested in arts events."	26%	31%	25%	33%

Arts Events and Institutions Attended

Each individual who reported attending live arts and entertainment events of any kind was asked to report the types of

events he or she had attended *in Portland* during the past year (from a prompting list read by the interviewer.) Because respondents to questions of this sort generally overestimate their activity, a selection of local organizations was identified by name. This allows the consultant to adjust the responses by comparing them to actual attendance figures at the events of those institutions. The information shown below is best understood to represent the similarities and differences in actual

Figure G: Reported Attendance at Portland Arts Events and Institutions
(as reported only by those who attend arts events and institutions)

	Percent of arts attendees who attended	
	Primary area	Extended area
1. A current touring Broadway musical, such as "Phantom of the Opera or Les Miserables"	11%	8%
2. A performance by the Portland Ballet Company	21%	16%
3. New Year's Portland	31%	25%
4. A play by Portland Stage Company	41%	34%
5. A play by Mad Horse Theatre company	24%	18%
6. A free outdoor event such as a concert in a neighborhood park	62%	48%
7. A concert by the Portland Symphony	48%	46%
8. A play presented by the Portland Players, Portland Lyric Theatre, or another community theatre group	35%	29%
9. A performance by the Children's Theatre of Maine or another youth theatre company	18%	15%
10. A visit to a gallery where art or fine crafts are sold	72%	62%
11. A presentation by the Portland Concert Association	26%	22%
12. An experimental or avant garde play	12%	7%
13. A modern dance concert	12%	9%
14. A visit to the Portland Museum of Art	72%	66%
15. A visit to the Maine College of Art's Baxter Gallery	15%	11%
16. A One-person Show, such as Hal Holbrook as "Mark Twain" or "Avner the Eccentric"	11%	8%
17. A concert of ethnic music or dance such as "French Connections" or "The Throat Singers of Tuva"	24%	15%
18. A performance by a touring Opera company	11%	8%
19. A visit to the Children's Museum of Maine	61%	52%
20. A live comedy act	19%	17%
21. A performance by a Popular Artist such as Andy Williams or Bob Dylan	40%	38%
22. A jazz concert	25%	21%
23. A rock concert	21%	20%
24. A Country and Western Concert	13%	13%
25. A classic, foreign or art film	36%	26%
26. Other	14%	15%

program availability and audience interest between primary market area attenders and the total extended market area attenders. The reported attendance is summarized in Figure G.

While the proportion of the group that attends most types of events is similar between the primary market area and the extended market area groups, there are some events and institutions which are experienced by a higher proportion of the primary area attenders than by the total extended area attenders.

- 62 percent of primary market area attenders saw a free outdoor event in a neighborhood park, compared with 48 percent of the extended market area attenders.
- 72 percent of the primary market area group visited a gallery where art or fine crafts are sold while only 62 percent of the extended market area attenders did so.
- The Children's Museum of Maine reportedly was visited by 61 percent of the primary market area attenders and 52 percent of the extended market area attenders.
- 36 percent of the primary market area group attended a classic or foreign film, as did 26 percent of the extended market area attenders.

Once again, this data is best interpreted in relative terms. Differences in proportional attendance do indicate, however, that programs and marketing efforts have different impact in the primary market area than in the extended market area as a whole. In the discussion of interest in programs below, other differences between the primary market area and extended market area groups are presented which provide further insight into the behavior of the two audience groups.

Support for The Arts: Subscriptions, Memberships and Contributions

Those respondents to the survey who qualified as arts attenders were asked about the subscriptions and memberships they held and monetary contributions which they made to Portland cultural organizations. Of this entire sample group:

- 16 percent of the primary market area arts attenders surveyed and 10 percent of the extended market arts attenders surveyed reported holding subscriptions or season tickets to performing arts groups.
- 21 percent of primary market area arts attenders and 22 percent of the extended market arts attenders reported holding memberships to local museums and galleries.
- 39 percent of primary market area arts attenders and 36 percent of the extended market arts attenders reported having made a monetary contribution to area arts organizations within the past three years.

Again, these figures are of greatest interest when looked at comparatively because over-reporting is generally to be expected for such questions. Figure H provides such a comparison with three other metropolitan areas for which comparable data is available (similar data cannot be developed for Charlotte.) As may be seen in the Figure, Portland extended market area rates of museum/gallery memberships are be

Figure H: Comparative Survey Responses in Other Metropolitan Areas: Support for the Arts (Responses of arts attendees)

	Portland extended market area	Dallas	Kansas City Metro Area	Portland, OR Metro Area
Subscriber or season ticket holder to performing arts institution	10%	17%	21%	5%
Membership in museum or gallery	22%	35%	Not avail.	14%
Monetary contributors to cultural groups	36%	35%	36%	29%

tween the rates of the two other cities and the rate of contributions is comparable. The performing arts subscription rate is

somewhat lower for Portland. It should be noted that the number of institutions and the priorities of individual institutions in these cities may be responsible, in part, for these results. For example, memberships in museums may be very high in cities where membership programs are strongly marketed, but much lower where free admissions are a major policy, or where there are fewer museums to solicit memberships.

Sources of Information about Arts Events

Arts attenders were asked to name (without prompting) the primary source of their information about arts events. Figure I summarizes the findings.

	Primary market area attenders	Extended market area attenders
Maine Sunday Telegram	12%	19%
Casco Bay Weekly	15%	10%
The Portland Press Herald ("GO" section)	59%	54%
National Public Radio	2%	4%
National Public Television	1%	1%
Direct mail from Arts Groups	8%	6%
Word of mouth	3%	3%

Primary market area attenders and the total extended market area sample provided similar responses to this question with more than 70 percent relying on major regional newspapers as their primary source of information about arts events.

When queried as to their satisfaction with the information available through these sources, the extended market area attenders responded:

- 10 percent thought that reviews in their primary sources were "very good," while 46 percent rated them "good"

- The completeness of calendar listing was considered very good by 26 percent of the attenders and good by 51 percent
- 16 percent found the feature articles very good, 49 percent rated them good
- Advance information about events was considered very good by 24 percent and good by 51 percent of the attenders.

Possible Approaches to Stimulating Attendance

Those who qualified as arts attenders were asked:

We are interested in discovering programs that specific arts organizations in Portland might offer to interest you in attending more events. Would you be Very Interested, Somewhat Interested or Not At All Interested in any of the following programs?

The respondents were then offered an array of program options for their consideration. Figure J provides the responses

Figure J: Interest in Possible Marketing and Promotion Initiatives (as reported only by those who attend arts events and institutions)

	Percent of extended market area arts attenders	
	Very Interested	Somewhat Interested
1. "Sampler" tickets to events by several organizations in a set series	26%	52%
2. A change in the time of day of events	11%	21%
3. A series where I can choose from among several different types of events	41%	43%
4. A change in day of the week for events	16%	23%
5. Having child care provided	16%	23%
6. Reduced ticket prices	15%	4%
7. A performance and dinner package	40%	29%
8. Free parking	65%	17%
9. Having transportation to downtown Portland provided	18%	11%
10. Improved safety in downtown Portland	27%	22%
11. More restaurants and shops near the events	14%	20%
12. Having related educational experiences, such as lectures before the events	15%	41%

indicating relative interest in each program offering for attenders from the entire extended market area. There were no significant differences between the responses of the larger area group and the primary market area group.

Those initiatives that appear to attract the greatest interest include:

- "A series where I can choose from among several different types of events" produced a very interested or somewhat interested response from 84% of the attenders also attracted 84 percent of the attenders (very or somewhat interested)
- Free parking was of interest to 82 percent of the attenders
- "Sampler" tickets to events by several organizations in a set series attracted 81 percent of the attenders (very or somewhat interested)

Spending Associated With Attendance

Arts attenders were asked:

When you attend an arts or entertainment event, do you usually dine out on the same evening or go out for drinks or snacks?

Fully 71 percent of the extended market area audience reported that they purchased food and refreshments related to attendance. Interestingly, the proportion of primary market attenders was lower, at 63 percent. Those who reported spending were asked:

How much, including the tip, would you say you usually spend, per person each evening?

The average, per person expenditure was estimated at \$22.86 for the extended market area group as a whole. Primary market area attenders spent slightly less, averaging \$22.32 per person, per event.

Ratings of Facilities

Arts attenders were asked if they had attended a selection of Portland’s cultural facilities in the past year and to provide a rating of each one that they had attended. The rating was based on a simple finding of agreement that the facilities had certain positive attributes. For example, each respondent who had attended City Hall Auditorium was asked if they found the auditorium to be conveniently located, in a safe neighborhood, attractive, and so on. Data in Figure K summarize the responses for attenders from the entire extended market area, together with the percent of the sample who had attended the facility in the past 12 months.

Figure K: Attender Ratings of Facilities

Facility	Attended in the past 12 months	Percent of Attenders who find the facility...				
		Convenient	In a safe neighborhood	Easy to park	Attractive	Comfortable
City Hall Auditorium	64%	93%	90%	54%	81%	65%
Portland Museum of Art	66%	95%	94%	58%	98%	95%
Children’s Museum of Maine	52%	95%	95%	66%	94%	92%
State Theater	46%	90%	88%	51%	91%	81%
Portland Stage Company (Performing Arts Center)	39%	91%	85%	70%	86%	88%
Portland Public Library	51%	86%	90%	54%	90%	91%
Portland High School Auditorium	14%	93%	86%	72%	83%	93%
Cumberland County Civic Center	71%	96%	89%	80%	82%	83%
First Parish Church (Congress Street)	25%	94%	98%	55%	92%	78%

In general, the facilities were given uniformly positive ratings, although the ease of parking found less than 60 percent agree-

ment for five of the nine facilities. Not surprisingly, City Hall Auditorium received the lowest ratings for comfort and attractiveness. Safety of the neighborhood and the general convenience of all of the facilities received 85 percent agreement or higher for all of the facilities.

Familiarity With the Arts District

All of the respondents were asked if they had ever heard of the Portland Arts District or the Cultural Corridor. Fifty percent of the extended area arts attenders and 60 percent of the non-attenders reported that they had heard of the area. Curiously, only 38 percent of the primary market area arts attenders answered positively.

Of those who had heard of the district, attenders were much more likely to be able to name an institution or activity that was located there. Fully 97% of the primary market area attenders who had heard of the district could name at least one institution there, while only 45% of the total extended market area attenders (who had heard of the district) could do so. Thirty-one percent of the non-attenders from the extended area who had heard of the area could name an institution there. It is clear from these results that the name and the concept of the arts district is still far from established in the public mind, even among many who attend events within the district.

Early Exposure to the Performing Arts

As a measure of the importance of early exposure to the arts, survey respondents were asked:

By the time you were 18 years old, had you attended any of the following types of performances by a major company or ensemble?

Attenders were significantly more likely to have attended an event by age 18 in all cases. Data in Figure L show the responses for attenders and non-attenders in the extended market area.

Figure L: Early Exposure to the Performing Arts

Percent who had attended by age 18

Event Type	Extended market area attenders	Extended market area non-attenders
A symphony concert	68%	52%
A play	84%	74%
A Broadway-type musical	54%	37%
An opera performance	26%	16%
A dance performance	63%	48%

Anticipating the Future: Programs for Children

Survey respondents were asked

“If more high quality arts programs for children and families with children were available in Portland do you think your annual attendance at children’s events would increase, remain about the same, or decrease?”

Among the extended market area residents, 37 percent of the attenders surveyed indicated that their attendance at children's events would increase, while 63 percent reported that their total annual attendance would remain about the same. The average projected amount of increase for attenders was about 4.1 events annually.

Among those respondents who are not arts attenders, 42 percent expected their attendance to increase (by an estimated 3.1 events annually), while 57 percent of non-attenders anticipated no increases.

Not surprisingly, households that sometimes include children in their attending party are the most likely to respond to additional children's programs. Fully 47 percent of those households anticipate an increase and their expected increase averages 4.1 events annually. While households with children naturally constitute the largest group expected to respond to increased programs for children, it is also likely that grandparents, other relations and friends of households with children

may increase their attendance at events for children if more programs were available.

Anticipating the Future: Interest in Programs

All of the respondents were asked to rate a large selection of specific types of events in response to the following question

"Now I am going to read a list of events. For each one, please tell me whether you would be extremely interested, very interested, a little interested, or not at all interested in attending, if a top quality offering were available in Portland."

Of the offerings read by the interviewer, many included events *already offered* in Portland. The purpose of including existing and potential new offerings was to assess the *relative* interest shown by respondents.

Overall, the interests of the primary market area and the extended market area are very similar. As would be expected, arts attenders show a higher level of interest in attendance overall than the general population. Figure M presents the percent of those responding "extremely interested" or "very interested" to each type of event.

The responses among attenders and non-attenders reflect very similar interests and priorities. Current attenders are somewhat more interested in current Broadway musicals and jazz concerts, plays by the Portland Stage Company and visits to the Portland Museum of Art. Non-attenders are somewhat more interested in live comedy and country and western concerts than are their attender counterparts.

Figure M: Reported Interest in Arts and Entertainment Events
(as reported by all respondents interviewed who are "Extremely" or "Very Interested")

	Attenders	Non-at-tenders
1. A current touring Broadway musical, such as "Phantom of the Opera or Les Miserables"	70%	53%
2. A visit to the Portland Museum of Art	74%	60%
3. A performance by the Portland Ballet	34%	35%
4. A performance by a visiting ballet company	32%	34%
5. A play by Portland Stage Company	60%	48%
6. A play by a touring professional theatre company	64%	52%
7. A free outdoor event such as a concert in a neighborhood park	67%	67%
8. A concert by the Portland Symphony	62%	59%
9. A concert by a major visiting symphony	59%	52%
10. A play presented by a local community theatre group	43%	45%
11. A youth theatre performance	35%	41%
12. A chamber music concert or a recital	20%	24%
13. An experimental or avant garde play	19%	14%
14. A performance by a modern dance concert	30%	31%
15. A touring Broadway drama such as "Private Lives" or "Steel Magnolias"	61%	54%
16. A One-person Show, such as Hal Holbrook as "Mark Twain" or "Avner the Eccentric"	40%	44%
17. A concert of ethnic music or dance such as "French Connections" or "The Throat Singers of Tuva"	31%	27%
18. A performance by a visiting opera company	25%	23%
19. A live comedy act	48%	60%
20. A performance by a Popular Artist such as Tony Bennett or George Benson	62%	54%
21. A jazz concert	46%	37%
22. A rock concert	33%	35%
23. A Country and Western Concert	18%	33%
24. A classic, foreign or art film	32%	21%
25. "Hands-on" classes in performing or visual arts	20%	18%

Arts in Education

Of particular interest in cultural planning is the level of public support for potential program initiatives in the area of arts in education. The entire group of survey respondents was asked

"There are many ways in which education in art, music, drama, and dance may be improved for school children in Portland. For each of the programs I will read to you, please tell me if you think it is Very Important, Somewhat

Important, or Not Important to include them in the school curriculum."

The responses from the extended market area (both attenders and non-attenders) are shown in Figure N.

Figure N: Importance of Arts Programs in the Schools
(Extended market area percent answering "Very important" or "Somewhat important")

	Total Sample	Arts Attenders	Non-Attenders	Households with children
1. Providing more classroom education in art, music, drama and dance.	96%	96%	96%	97%
2. Providing field trips to museums and arts events.	98%	97%	99%	100%
3. Providing tickets to live arts events at reduced cost to school children and their families.	96%	95%	97%	96%
4. Providing more extracurricular, participatory activities in art, music, drama and dance.	96%	97%	96%	97%
5. Providing artists to work with children for special in-school experiences.	96%	97%	96%	96%
6. Assuring that art, music, drama and dance are taught by qualified professionals.	96%	98%	93%	95%

Clearly, the respondents feel that the types of educational programs and experiences described to them are important for school children. Ninety-three percent or more supported each program initiative presented.

It is interesting to note that there were no significant differences in the responses of arts attenders and non-attenders in the sample. Each of the subgroups placed especially high priority on field trips.

DEMOGRAPHICS

A selection of demographic characteristics was also collected from the respondents to the survey, in order to compare the various attender and non-attender groups. These demographics are summarized for the attenders and non-attenders in the extended market area and for primary market area attenders in Figure O below.

Figure O: Demographics of the Sample Subgroups
(Totals may not equal 100 percent due to rounding and/or refusal to give information.)

	Extended area arts attenders	Extended area non- attenders	Primary area arts attenders
Age			
18-24	5%	7%	8%
25-34	14%	20%	16%
35-44	38%	25%	35%
45-54	23%	19%	20%
55-64	10%	12%	13%
65 AND OVER	11%	17%	8%
Sex			
Female	63%	64%	62%
Male	37%	35%	37%
Ethnic Origin			
African-American	0%	1%	0%
Asian-American	1%	1%	1%
Hispanic	1%	1%	0%
Native American	1%	1%	1%
White	94%	93%	93%
Other	1%	1%	1%
Length of residence in the market area			
One year or less	2%	3%	1%
2 years	3%	2%	1%
3 years	2%	1%	2%
4-6 years	9%	8%	12%
7-10 years	8%	5%	5%
More than 10 years	76%	81%	79%
Highest level of educa- tion attained			
Grade school	0%	1%	0%
Some high school	1%	3%	1%
High school graduate	14%	30%	11%
Some college	17%	29%	21%
College graduate	39%	25%	38%
Post graduate work	28%	8%	26%
Technical school	2%	4%	3%

Figure O: Demographics of the Sample Subgroups (cont.) (Totals may not equal 100 percent due to rounding and/or refusal to give information.)

	Extended area arts attenders	Extended area non- attenders	Primary area arts attenders
Average children/household	2.1	2.2	2.2
Place of Residence			
City of Portland/South Portland	27%	23%	60%
All others within market area	73%	77%	40%
Wage-earners in the household			
One	28%	28%	24%
Two	50%	40%	53%
Three or more	7%	7%	8%
Retired/other	15%	25%	15%
Total household income before taxes in 1991			
Under \$10,000	2%	4%	3%
\$10,000-14,999	2%	5%	4%
\$15,000-24,999	8%	16%	4%
\$25,000-34,999	11%	14%	14%
\$35,000-49,999	16%	18%	15%
\$50,000-74,999	22%	10%	24%
\$75,000-99,999	11%	8%	10%
\$100,000 or more	7%	1%	6%

PROJECTED POTENTIAL AUDIENCE

In order to project the potential future audience for various types of events in Portland, the information gathered in the survey was analyzed using a detailed attendance model. There are two purposes for providing general estimates of change in the available audiences is:

- The effects of population and demographic change in the community may be anticipated.
- The possible impact of audience development initiatives can be estimated.

The attendance model used by the consultant allows for great flexibility and accuracy in projecting potential audience numbers:

- It affords the ability to model the behavior of the various different attendance level groups independently.
- It makes provision for adjusting the levels of reported attendance by comparison with actual attendance counts at various organizations and performance venues.

The detailed explanations of the analytical techniques used, together with the relevant documentation are included in Appendix S1-B of this Report.

The projected growth of the extended market area population between 1995 and 2005 and expected changes in demographic composition have been used to estimate increases in available audiences which may develop as a result of the increased population base of the area. Projections of population were provided by Urban Decision Systems, Inc., a commercial provider of planning data.

In addition, it may not be realistic to assume that the only growth in audiences will come with changes in the population. Over time, as Portland institutions develop their audiences, improve their marketing skills, and produce higher quality work, audience members may consume more of their programming. The potential audience figures discussed below, therefore, make conservative projections of available audiences reflecting both demographic change and development of the local cultural organizations.

Interpreting the Results

In any projective work of this type, there are a number of important factors which must be kept in mind.

- First, while it is possible to project potential audiences for arts and entertainment events, the behavior of consumers with regard to specific individual events is extremely diffi-

cult to predict. Therefore, the projected audience *potentials* are not predictions of attendance. The key point is that there are many variables of program quality, availability of events in the marketplace, and coinciding competing events which can never be accurately anticipated in the aggregate. Therefore, the potential audience described in this Report is just that - a potential market which may be successfully captured, if appropriate product is available, if appropriate programming is selected for the marketplace, and if the programming is properly positioned in the larger competitive marketplace.

- Second, it is necessary to assume that any new programs presented will be of high quality, competently and effectively presented, and aggressively promoted.
- Finally, it is assumed that no significant changes will occur in the political, social or economic climate, either locally or nationally which would have a significant impact on the region's audiences or their behavior.

In projecting potential attendance, the consultant has used three different scenarios. The three scenarios show the sensitivity of the attendance potentials to the survey results and various assumptions about future development of the arts in the Portland area. Using the survey results, a current baseline estimate of total 1994 attendance was derived of 600,000 paid attendances at non-profit and commercial arts and entertainment events, museums and galleries (exclusive of free outdoor and festival events and New Year's Portland) and 360,000 unpaid admissions. For purposes of comparison, the Portland Symphony, Portland Stage Company, Portland Center for the Arts, Portland Ballet, Mad Horse Theatre, Portland Museum of Art and the Children's Museum of Maine reported total paid and unpaid admissions of 434,000 for 1994, or approximately 45 percent of the total.

Under the scenarios presented in the analysis, which anticipate projected population growth, changes in the age composition of the region and varying levels of audience development, the new available audience could increase by 1.8 to 11.7 percent by the year 2005. The range of increase is due primarily to differ-

ing assumptions about investment (and success) in audience development and marketing activities. In addition, the figures above are for adult audience members only. While children's attendance at specific events is generally difficult to predict, survey results indicate that children could account for approximately 12 percent additional attendance overall.

The results of the analysis are summarized in Figure P on the following page. The figures given in Figure P reflect the number of admissions potentially available during a twelve-month period based on newly available audience members and the results of audience development initiatives..

CONCLUSION

It is clear that significant expansion in attendance will not naturally result from population growth and demographic change in the extended market area over the next ten years.

Additionally, the market shows signs of being maturely developed. In particular, the high adult participation rates and the very large percentage of heavy attenders within the attender group suggest that there are no major audience segments that have not already been at least partially developed.

Planning for audience development, then, should focus on four approaches:

- Maintaining and developing the existing market base to the greatest extent possible. Realistically, this will probably not exceed the approximately 12 percent total growth in annual attendance projected by 2005 under the highest audience development scenario.
- Marketing events to children groups with children.
- Seeking to expand the geographic market area. This will probably be only marginally effective because the area is currently rather large.
- Expanding the capture rates of tourists, visitors and seasonal residents. These segments of the market are not well

SUPPLEMENT I: A STUDY OF PORTLAND'S ARTS AUDIENCE

documented or understood, but efforts to develop the attractiveness of downtown Portland and the arts district may deliver larger numbers of these potential audience members to the immediate area.

Figure P: Potentially Available Adult Audience in the Portland Extended Market Area 1995-2005

1995			
Current total attendance estimate (commercial and non-profit events, museums and galleries)			960,000
2000			
Potential total attendance due to population growth and demographic changes only			966,000
Percent growth from 1995 estimate			0.6%
Potential total attendance under audience development scenarios	<i>Low Scenario</i>	<i>Medium Scenario</i>	<i>High Scenario</i>
Potential Total Adult Attendance	970,400	1,015,700	1,064,400
Percent growth from 1995 estimate	1.1%	5.8%	10.9%
2005			
Potential total attendance due to population growth and demographic changes only			973,000
Percent growth from 1995 estimate			1.4%
Potential total attendance under audience development scenarios	<i>Low Scenario</i>	<i>Medium Scenario</i>	<i>High Scenario</i>
Potential Total Adult Attendance	977,200	1,022,900	1,072,000
Percent growth from 1995 estimate	1.8%	6.6%	11.7%

APPENDIX S1-A.
AUDIENCE SURVEY
QUESTIONNAIRE

PORTLAND ARTS SURVEY QUESTIONNAIRE

(ASK TO SPEAK TO AN ADULT HOUSEHOLD MEMBER) Time Started:

Hello, I'm calling on behalf of the City of Portland to investigate interest in the arts and cultural activities in the city. May we have a few minutes of your time?

1. For this survey we need to talk to people in certain age categories. Is your age...?

- 1. Under 18 -- TERMINATE
- 2. between 18-24
- 3. between 25-34
- 4. between 35-44
- 5. between 45-54
- 6. between 55-64
- 7. 65 AND OVER

2. What City or town do you live within ...? (DON'T READ)

- 1. Portland
- 2. South Portland
- 3. Biddeford
- 4. Brunswick
- 5. Cape Elizabeth
- 6. Cumberland
- 7. Falmouth
- 8. Freeport
- 9. Gray
- 10. Gorham
- 11. Harpswell
- 12. Kennebunk
- 13. Kennebunkport
- 14. Long Island
- 15. New Gloucester
- 16. North Yarmouth
- 17. Old Orchard Beach
- 18. Pownal
- 19. Saco
- 20. Scarborough
- 21. Westbrook
- 22. Windham
- 23. Yarmouth
- 24. ALL OTHERS - TERMINATE

3. During the past 12 months, have you attended any type of performing arts or entertainment event either *in Portland or elsewhere*, such as a concert, a play, a Broadway show, a dance concert, an opera performance, New Year's Portland or any other popular cultural event for which you or someone else paid for the tickets?

- 1. No -- (GO TO Q.3a)
- 2. Yes -- (GO TO Q.3b)

3a. Have you visited a museum or an art gallery in Portland or elsewhere in the past 12 months?

- 1. No -- (GO TO Q. 15)
- 2. Yes -- (GO TO Q. 4)

3b. Have you visited a museum or an art gallery in Portland or elsewhere in the past 12 months?

- 1. No ()
- 2. Yes ()

4. I am now going to read a list of cultural events and institutions. For each type of event, please tell me if, within the last 12 months, you have attended such an event *in Portland*, and if you have, about how many times you attended in the past year.

	Attended	Yes	If attended, # of Times
1. A current touring Broadway musical, such as "Phantom of the Opera or Les Miserables"	No	Yes	_____
2. A performance by the Portland Ballet Company	No	Yes	_____
3. New Year's Portland	No	Yes	_____
4. A play by Portland Stage Company	No	Yes	_____
5. A play by Mad Horse Theatre company	No	Yes	_____
6. A free outdoor event such as a concert in a neighborhood park	No	Yes	_____
7. A concert by the Portland Symphony	No	Yes	_____
8. A play presented by the Portland Players, Portland Lyric Theatre, or another community theatre group	No	Yes	_____
9. A performance by the Children's Theatre of Maine or another youth theatre company	No	Yes	_____
10. A visit to a gallery where art or fine crafts are sold	No	Yes	_____
11. A presentation by the Portland Concert Association	No	Yes	_____
12. An experimental or avant garde play	No	Yes	_____
13. A modern dance concert	No	Yes	_____
14. A visit to the Portland Museum of Art	No	Yes	_____
15. A visit to the Maine College of Art's Baxter Gallery	No	Yes	_____
16. A One-person Show, such as Hal Holbrook as "Mark Twain" or "Avner the Eccentric"	No	Yes	_____
17. A concert of ethnic music or dance such as "French Connections" or "The Throat Singers of Tuva (TOO vah)"	No	Yes	_____

- | | | | |
|---|----|-----|-------|
| 18. A performance by a touring Opera company | No | Yes | _____ |
| 19. A visit to the Children's Museum of Maine | No | Yes | _____ |
| 20. A live comedy act | No | Yes | _____ |
| 21. A performance by a Popular Artist such
as Andy Williams or Bob Dylan | No | Yes | _____ |
| 22. A jazz concert | No | Yes | _____ |
| 23. A rock concert | No | Yes | _____ |
| 24. A Country and Western Concert | No | Yes | _____ |
| 25. A classic, foreign or art film | No | Yes | _____ |
| 26. Other _____ | No | Yes | _____ |

5. When you attend arts events, how many people are usually in your party, including yourself?

1. Number in party _____

6. When you attend an arts event, are there ever children under age 18 in your party?

1. No ()-- (GO TO Q. 7)
2. Yes ()-- (GO TO Q. 6a)

6a. What percentage of the time would you say that children accompany you to arts events?

- | | |
|-----------|------------|
| 10% _____ | 60% _____ |
| 20% _____ | 70% _____ |
| 30% _____ | 80% _____ |
| 40% _____ | 90% _____ |
| 50% _____ | 100% _____ |

6b. When children attend with you, how many attend? _____

7. Are you a season ticket holder, or a subscriber, to any *performing arts* group in Portland?

1. No ()-- (GO TO Q.8)
2. Yes ()-- (GO TO Q.7a)

7a. Which ones? (DON'T READ)

1. () Portland Concert Association
2. () Portland Symphony
3. () Portland Ballet Company
4. () Portland Stage Company
5. () Portland Performing Arts
6. () Mad Horse Theatre

7. () Other _____

8. Do you hold a membership in any local *museum or gallery*?

1. No ()-- (GO TO Q. 9)
2. Yes ()-- (GO TO Q. 8a)

8a. Which ones? (DON'T READ)

1. () Children's Museum of Maine
2. () Portland Museum of Art
3. () Maine Historical Society
4. () Other _____

9. Within the past three years, have you made a monetary contribution to a cultural group in Portland?

1. No ()-- (GO TO Q. 10)
2. Yes ()-- (GO TO Q. 9a)

9a. Which ones have you contributed to?(DON'T READ)

1. () Portland Concert Association
2. () Portland Symphony
3. () Portland Ballet Company
4. () Portland Stage Company
5. () Portland Performing Arts
6. () Mad Horse Theatre
7. () Children's Museum of Maine
8. () Portland Museum of Art
9. () Maine Historical Society
10. () Other _____

10. When you attend an arts or entertainment event, do you usually dine out on the same evening or go out for drinks or snacks?

1. No ()-- (GO TO Q 11.)
2. Yes ()-- (GO TO Q.10a)

10a. How much, including the tip, would you say you usually spend, *per person each evening*? (DON'T READ)

1. () Less than \$10
2. () \$10-15
3. () \$16-20
4. () \$21-25
5. () \$26-30
6. () \$31-35
7. () \$35+

11. We are interested in discovering programs that specific arts organizations in Portland might offer to interest you in attending more events. Would you be *Very Interested*, *Somewhat Interested* or *Not At All Interested* in any of the following programs?

	Very Interested	Somewhat Interested	Not at All Interested
1. "Sampler" tickets to events by several organizations in a set series	1	2	3
2. A change in the time of day of events	1	2	3
3. A series where I can choose from among several different types of events	1	2	3
4. A change in day of the week for events	1	2	3
5. Having child care provided	1	2	3
6. Reduced ticket prices	1	2	3
7. A performance and dinner package	1	2	3
8. Free parking	1	2	3
9. Having transportation to downtown Portland provided	1	2	3
10. Improved safety in downtown Portland	1	2	3
11. More restaurants and shops near the events	1	2	3
12. Having related educational experiences, such as lectures before the events	1	2	3

12. Which of the following facilities did you attend last year?

FOR EACH ATTENDED," ASK:

12a. Do you think (FACILITY) is: conveniently located, in a safe neighborhood, easy to park at, attractive, comfortable for seeing and hearing?(*RECORD BELOW*)

	Attended		Convenient	Easy Safe To Park		Attractive	Comfortable
	No	Yes	1	2	3	4	5
1. City Hall Auditorium	No	Yes	1	2	3	4	5
2. Portland Museum of Art	No	Yes	1	2	3	4	5
3. Children's Museum of Maine	No	Yes	1	2	3	4	5
4. The State Theatre	No	Yes	1	2	3	4	5

			Attended	Convenient	Easy Safe To Park	Attractive	Comfortable
5. The Portland Stage Company	No	Yes	1	2	3	4	5
6. Portland Public Library	No	Yes	1	2	3	4	5
7. Portland High School Auditorium	No	Yes	1	2	3	4	5
8. Cumberland County Civic Center	No	Yes	1	2	3	4	5
9. First Parish Church (on Congress Street)	No	Yes	1	2	3	4	5
10. Other _____	No	Yes	1	2	3	4	5

13. What is your primary source of information about arts events? (*DONT READ*)

1. Maine Sunday Telegram
2. Casco Bay Weekly
3. Portland Press Herald ("GO" section)
4. Commercial television
5. National Public Radio (Maine Public Radio)
6. National Public Television (Maine Public television)
7. Direct mail from Arts Groups
8. Word of mouth
9. Other _____

13b. Please tell me if you think this source of information is Very Good, Good, Fair or Poor in each of the following areas.

	Very Good	Good	Fair	Poor	Don't Know
1. Reviews and criticism	1	2	3	4	5
2. Completeness of calendar listings	1	2	3	4	5
3. Feature articles	1	2	3	4	5
4. Advance information about events	1	2	3	4	5

14. Where else do you often look for information about arts events? (*DONT READ --- DO RECORD ALL RESPONSES*)

1. Maine Sunday Telegram
2. Casco Bay Weekly
3. Portland Press Herald ("GO" section)
4. Commercial television
5. National Public Radio (Maine Public Radio)
6. National Public Television (Maine Public television)
7. Direct mail from Arts Groups
8. Word of mouth
9. Other _____

15. I am going to read some reasons people give for not attending more events in **Portland**. For each reason that I read, please tell me whether it is a major reason, a minor reason, or not a factor at all for you, yourself, not attending more events in the area.

	Major	Minor	Not a Factor
1. "The arts groups in Portland don't offer what I want to see."	1	2	3
2. "The quality of the presentations is not high enough."	1	2	3
3. "I don't hear about the events in Portland."	1	2	3
4. "Parking downtown is difficult and expensive."	1	2	3
5. "There are not enough afternoon events and matinees"	1	2	3
6. "Events are held in facilities which are not conveniently located for me to attend."	1	2	3
7. "The ticket prices are too high for me to attend more events."	1	2	3
8. "I don't have anyone to attend events with."	1	2	3
9. "I don't feel safe in downtown Portland."	1	2	3
10. "There aren't enough events in the Arts District"	1	2	3
11. "Downtown Portland closes up too early in the evening"	1	2	3
12. "I don't understand arts events."	1	2	3
13. "I only go to see well known performers."	1	2	3
14. "Other activities use up all of my free time."	1	2	3
15. "I'm not interested in arts events."	1	2	3
16. "I have trouble getting child care"	1	2	3
17. "The weather sometimes prevents me from attending"	1	2	3

16. We have heard some comments about the arts in Portland and the city in general, and I am going to read them to you. For each of these comments, please tell me if you strongly agree, agree, disagree, or strongly disagree with the statement.

	Strongly Agree	Agree	Don't Know	Disagree	Strongly Disagree
1. "The arts are available to all residents, no matter where in the Portland area they live."	1	2	3	4	5
2. "Downtown Portland is more interesting and attractive than it was five years ago."	1	2	3	4	5
3. "More cultural activities should take place in neighborhoods rather than in downtown Portland."	1	2	3	4	5
4. "The arts in Portland are only of interest to the wealthy and well-educated "	1	2	3	4	5
5. "I find myself dining out and shopping more often in downtown Portland or the Old Port than I used to."	1	2	3	4	5
6. "There is little diversity of cultural expression in arts programs in Portland."	1	2	3	4	5
7. "Portland is a much better place to live because of the variety of arts activities going on here."	1	2	3	4	5
8. "It's important for the City of Portland government to support artists and arts institutions more actively."	1	2	3	4	5
9. "When I think about attending arts and entertainment events, I usually think about going to Boston or other places before I think of Portland."	1	2	3	4	5
10. "Better promotion of Portland's cultural life could improve tourism in the area."	1	2	3	4	5
11. "Unless City and town governments increase their support for the arts, we may lose some of our cultural institutions and programs."	1	2	3	4	5
12. "Portland is a more interesting place to live than most people think."	1	2	3	4	5
13. "I think that my town government should provide support for arts institutions that serve the region"	1	2	3	4	5
14. "I am more interested in the work of Maine artists than the work of people from away."	1	2	3	4	5

17. If more high quality arts programs for children and families with children were available in **Portland** do you think your annual attendance at children's events would increase, remain about the same, or decrease?

- 1. Increase -- GO TO 17a
- 2. Remain about the same -- GO TO 18
- 3. Decrease -- GO TO 17b

17a. By how much do you think your attendance would increase?

- 1. once a year
- 2. twice a year
- 3. 3-5 times a year
- 4. 6-8 times a year
- 5. 9 or more times a year

GO TO Q. 18

17b. By how much do you think your attendance would decrease?

- 1. once a year
- 2. twice a year
- 3. 3-5 times a year
- 4. 6-8 times a year
- 5. 9 or more times a year

18. Now I am going to read a list of events. For each one, please tell me whether you would be extremely interested, very interested, a little interested, or not at all interested in attending, if a top quality offering were available **in Portland**. (RECORD BELOW)

	Extremely Interested	Very Interested	A Little Interested	Not At All Interested
1. A current touring Broadway musical, such as "Les Miserables" or "Phantom of the Opera"	1	2	3	4
2. A visit to the Portland Museum of Art	1	2	3	4
3. A performance by the Portland Ballet	1	2	3	4
4. A performance by a visiting ballet company	1	2	3	4
5. A performance by Portland Stage Company	1	2	3	4
6. A play by a touring professional theatre company	1	2	3	4
7. A free outdoor event such as a concerts in a neighborhood park	1	2	3	4
8. A concert by the Portland Symphony	1	2	3	4
9. A concert by a major visiting symphony	1	2	3	4

	Extremely Interested	Very Interested	A Little Interested	Not At All Interested
10. A play presented by a local community theatre group	1	2	3	4
11. A youth theatre performance	1	2	3	4
12. A chamber music concert or a recital	1	2	3	4
13. An experimental or avant garde play	1	2	3	4
14. A performance by a modern dance company	1	2	3	4
15. A touring Broadway drama such as "Private Lives" or "Steel Magnolias"	1	2	3	4
16. A One-person Show, such as Carol Burnett or "Avner the Eccentric"	1	2	3	4
17. A concert of ethnic music or dance such as "French Connections" or "The Throat Singers of Tuva (TOO vah)"	1	2	3	4
18. A performance by a visiting opera company	1	2	3	4
19. A live comedy act	1	2	3	4
20. A performance by a Popular Artist such as Tony Bennett or George Benson	1	2	3	4
21. A jazz concert	1	2	3	4
22. A rock concert	1	2	3	4
23. A Country and Western Concert	1	2	3	4
24. A classic or foreign film festival	1	2	3	4
25. "Hands-on" classes in performing or visual arts	1	2	3	4

19. There are many ways in which education in art, music, drama, and dance may be improved for school children in Portland. For each of the programs I will read to you, please tell me if you think it is Very Important, Somewhat Important, or Not Important to include them in the school curriculum.

	Very Important	Somewhat Important	Not Important
1. Providing more classroom education in art, music, drama and dance.	1	2	3
2. Providing field trips to museums and arts events.	1	2	3

	Very Important	Somewhat Important	Not Important
3. Providing tickets to live arts events at reduced cost to school children and their families.	1	2	3
4. Providing more extracurricular, participatory activities in art, music drama and dance.	1	2	3
5. Providing artists to work with children for special in-school experiences.	1	2	3
6. Assuring that art, music, drama and dance are taught by qualified professionals.	1	2	3

20. By the time you were 18 years old, had you attended any of the following types of performances by a major company or ensemble?

1. A symphony concert
2. A play
3. A Broadway-type musical
4. An opera performance
5. A dance performance

21. Have you ever heard of the Portland Arts District or the Cultural Corridor?

1. Yes (go to Q.21b)
2. No (go to Q.22)

21b. Can you name any arts organizations, institutions or clubs that are located in the District, or that perform there? (DO NOT READ LIST)

1. Portland Concert Association
2. Portland Symphony
3. Portland Ballet Company
4. Portland Stage Company
5. New Year's Portland
6. State Theatre
7. Children's Museum of Maine
8. Portland Museum of Art
9. Maine College of Art
10. Maine Historical Society
11. Portland Public Library
12. Other _____

Now, I have a few more questions for statistical purposes only. The answers will, of course, be kept in strictest confidence and used only for aggregate figures.

22. How long have you lived in the Portland area?

1. one year or less
2. 2 years
3. 3 years
4. 4-6 years
5. 7-10 years
6. More than 10 years

23. Was the highest level of education you completed...

1. Grade school
2. Some high school
3. High school graduate
4. Some college
5. College graduate
6. Post graduate work
7. Technical school

24. How many children under age 18 live in your household? _____

25. Is the chief wage-earner self-employed, or employed by a company or the government?

1. Self-employed
2. Has employer
3. Retired
4. Other

26. What is the occupation of the chief wage-earner? (Probe for specific details of duties for classification.) _____

27. Is there another wage-earner in the house?

1. No -- GO TO Q. 28
2. Yes -- GO TO Q. 27b

27b. How many wage-earners are there in all? _____

28. If you don't mind telling me, was your total household income before taxes in 1994...

1. Under \$10,000
2. \$10,000-14,999
3. \$15,000-24,999
4. \$25,000-34,999
5. \$35,000-49,999
6. \$50,000-74,999
7. \$75,000-99,999
8. \$100,000 or more

29. What is your ethnic origin? (DO NOT READ LIST)

- 1. African-American
- 2. Asian-American
- 3. Hispanic
- 4. Native American
- 5. Pacific Islander
- 6. White
- 7. Franco-American
- 8. Other (specify) _____
- 9. No answer

30. Record Sex of Respondent

- 1. Male
- 2. Female

31. Record Zip Code _____

APPENDIX S1-B. TECHNICAL ANALYSIS OF AUDIENCE POTENTIALS

In this Appendix, an explanation of the technical approach to projecting audience potentials is presented. The purpose of this analysis was to provide estimates of the increases in available audience which may result through population growth, demographic changes and improvements in programming and marketing in the Portland expanded arts market area. Using primary data developed through the audience survey a range of possible outcomes is explored. The reader should refer to the main body of this Supplement for further information on the audience survey and the use of the audience analysis in making these projections.

The analytic process requires three major steps:

- Step 1: Create an inventory of the past behaviors and current interests of the Portland area arts audience.
- Step 2: Adjust the reported attendance of the local audience members by comparing it with actual attendance levels at local arts institutions.

- Step 3: Develop alternative scenarios for changes in audience behavior over time.

Further explanation of the analysis is given below.

Step 1: Create an inventory of past behaviors and current interests.

This was one of the major tasks of the audience survey, resulting in an identification of the types of events which the respondents attended and the frequency of their attendance. The inventory established the proportion of the population which attends events, and allows for their classification into attendance frequency groups for analysis, as was presented in the main body of this Supplement.

This allows for a basic projection of the number of *adults* in the market area who are arts attenders, and the proportion of those who are Light, Medium or Heavy attenders. For the purposes of this analysis, attendance at free outdoor and festival events and New Year's Portland were not included, as they tended to distort the overall attendance picture, and could not be reliably adjusted for over-reporting as described below.

Step 2: Adjust the reported attendance by comparing it with actual attendance levels reported by arts producers and presenters.

It is an interesting fact that respondents to surveys which inventory attendance at arts and entertainment events generally over-report their attendance. This may be because the survey respondents do not confine their recollection of attendance to the required single calendar year or it may be because they perceive that the interviewer will regard them more positively if they appear to attend more events. It is therefore important to adjust for over-reporting and this can be done, to the extent that reliable data are available, by comparing the reported attendance with statistics describing the actual attendance at various Portland arts institutions. The overall level of attendance

is then scaled back accordingly, under the assumption that all events are comparably over-reported.

Step 3: Develop alternative scenarios for changes in audience behavior over time.

Two factors which will affect the size of the available audience in the future are included in the model. First, expected population growth and an increase in the proportion of adults in the population will influence the overall number of the available attenders in the area. To understand the impact of population growth, the model was run in three versions: a version using current population estimates for 1995, one using 2000 population estimates and a version for the year 2005. Population estimates were provided Urban Decision Systems, Inc., a major commercial provider of market planning data. The projections used employ mid-range assumptions concerning mortality and migration rates for the market area.

This approach is conservative in that it assumes that the proportion of arts attenders in the population will remain stable, even though education levels, income, and white collar occupations within the local population are projected to increase between 1995 and 2005. It does adjust, however, for projected increases in the proportion of residents who are over age 18, and thus qualify as potential adult attenders.

The second factor which will have an impact on attendance is the effect of changes in the local arts industry, such as new programming and facilities, and improved marketing and promotion programs. For performing arts programs, the model allows for scenarios which project differing levels of increased attendance by Light, Medium and Heavy attenders.

In order to understand the sensitivity of the model to these adjusted projections of future attendance reported by those surveyed, three scenarios were developed. These scenarios cover a range of possible changes in attendance levels for each attendance frequency group. The three scenarios were then calculated for 2000 and 2005 population levels.

Supplement II:
A Cultural Census of
Portland

November, 1995

Prepared for the Arts and Cultural
Steering Committee

by
Marc Goldring
The Wolf Organization, Inc.

SECTION I.

A CULTURAL CENSUS FOR PORTLAND

Introduction

As part of a project to create a development plan for the City of Portland's Arts District, the consultant worked with a sub-committee of the Steering Committee to develop and implement a "cultural census." The purpose of this research was three-fold:

- to provide guidance to the consultant team as it developed the plan for the arts district
- to document the impact of the "cultural industry" on Portland's economy
- to gather information about the range and diversity of artists and cultural activities, events and programs in Portland to inform a larger community-wide cultural planning effort to be conducted at a later date.

Work on the cultural census began in January of 1995. Three separate census instruments were developed for:

- artists
- organizations, arts facilitators, and distributors
- facilities with an emphasis on performing arts.

From the beginning, the cultural census was conceived of as an on-going effort, with a focus on gathering information that was useful, relatively easy to gather, and that could be updated or supplemented annually.

Census forms were distributed in April and May and the returns were edited, tallied, and analyzed by the consultant. Responses have continued to be received and late entries have been added to the database. However, in some cases, it has not been possible to include data from those few late census forms in the tallies.

This supplement is divided into two sections:

- **Section I** provides some background on the cultural census, including a description of the methodology used and some caveats about how the quantitative components of the research should be used.
- **Section II** details the quantitative findings of the artists and organization censuses in some depth.

In addition, the consultants provide several appendices, included in a separate volume, with additional details about the cultural census, including:

- **Appendix A** provides narrative summaries of the non-quantitative aspects of the cultural organization census.
- **Appendix B** provides narrative summaries of the non-quantitative aspects of the individual artist census.
- **Appendix C** offers the supplementary information on facilities in inventory fashion.
- **Appendix D** makes recommendations on ways to alter and improve the census instruments.
- **Appendix E** includes the three census forms as they were sent out.
- **Appendix F** provides additional statistical break-outs on several census questions that are discussed in Section II of the report.
- **Appendix G** lists in narrative form additional comments that were written on returned census forms in addition to or instead of answering specific questions.

Description of Methodology

Developing the Census

The cultural census instruments were developed based on discussions with a sub-committee of the Arts District Plan Steering Committee, convened

for this project. These discussions were informed by a charette sponsored by the Maine Arts Commission that concern a possible state-wide cultural census. Portland's effort is seen as a "pilot project" for the state-wide endeavor.

There were several steps in the development of the census instruments:

1. The consultant, working with City staff, developed a list of key information that would be useful in understanding the cultural community.
2. This list was refined by the consultant to balance the need for information with the need to keep the instrument simple and easy to fill out.
3. Based on that analysis, draft census instruments were designed by the consultant and presented to the sub-committee for its review and comment.
4. The sub-committee made revisions to the instruments based on that review and additional comments were solicited from other members of the Steering Committee.
5. The three survey forms, having passed through several reviews by the sub-committee, were completed in April.

The census forms were mailed to cultural organizations and individual artists using mailing lists compiled for this purpose. In addition, copies — particularly of the artist's census form — were circulated by Steering Committee members and other individuals.

Data Entry and Analysis

Much of the information requested by the census was narrative in nature (for example, program descriptions, artist's statements, and organization mission statements). These questions were reviewed, summarized, and entered into the database. Often individuals or organizations provided additional back-up material, as they had been encouraged to do. In those cases, the material was clipped to the census form and an entry was made in the appropriate field of the database to indicate that additional information was on file.

The supplementary facility census form requested descriptive information and that data was entered into a separate database. No quantitative analysis of that information was appropriate and it is provided in inventory fashion in Appendix C to this report.

The quantitative data was handled in a similar fashion for both artists and organizations. The consultant reviewed the forms, called organizations or individuals for clarification if necessary, and entered the data into a computerized database. In general, the questions were answered in a clear way. However, there were some areas of confusion and the consultant adopted several conventions in data entry to address them:

- In some cases, respondents provided ranges of data rather than specific numbers. In these cases, the consultant entered an average of the numbers provided, even though this was likely to understate the actual figures.
- Occasionally, respondents would circle two responses or write comments instead of indicating a response. In these cases, the consultant generally avoided “interpreting” the response. If the comments provided clear information about the appropriate response, the consultant would use that; otherwise he would not enter any response.

Once the data was entered, the consultant tallied it and performed a variety of cross-tabulations. These included whether the organizations were profit or nonprofit, in or outside the arts district, and small (less than \$100,000 annual expenditures) or large budget size. For artists, the consultant looked at cross-tabulations by discipline and location. In general, there were no significant differences among these various cross-tabulations. However, in specific questions, there were often more appropriate break-outs and these are indicated in the discussion of findings in the next part of this report.

A Caveat

These cultural census instruments are primarily *inventories*. This means that they are intended, as much as possible, to describe the universe of Portland’s artists and cultural organizations as fully as possible. The

consultant has a great deal of confidence in the descriptive information that they contain, as well as the data on audience, employees, volunteers, and expenditures.

The census has also been used to gather attitudinal data, and these responses must be used carefully, for several reasons:

- First, in the case of artists, the census is not a complete tally of Portland artists, nor was it designed to be a controlled and representative sample. The consultant notes that (based on meetings held with local artists) the responses appear to be skewed toward visual artists as discussed in Section II of this report. In effect these findings come from a self-selecting sample and generalizing from them may be problematic.
- Second, the organization census, while representing a greater proportion of the total population than the artists census does, also is a self-selecting sample. It is not always clear who in the organization responded to the attitudinal questions and whether they were qualified to provide this viewpoint for the organization as a whole.

This is not to suggest that the attitudinal questions do not provide useful data. Rather, it points to the importance of using care when generalizing from these findings.

SECTION II.

PORTLAND'S CULTURAL "INDUSTRY"

In this section of the report, the consultants provide details of the quantitative findings of the cultural census, an analysis of information about organizations and individual artists. Additional information is presented in summary narrative form in the latter parts of this report, including information about facilities, gathered as part of the cultural census.

The Basics

The cultural census was returned by fifty-nine cultural "organizations, arts facilitators, and distributors," of which 54 percent were in the downtown arts district (defined for this analysis as Portland's downtown area). Responses to a separate census instrument were received from seventy-two artists. A break-down of the respondents is provided below in Table 1.

Table 1: Cultural Census Respondents

	In district	%	Not in district	%	Combined
Organizations	32	54.2%	27	45.8%	59
Artists	25	34.7%	47	65.3%	72

Based on the consultant's interviews and a review of materials about Portland's cultural community, it is safe to say that the level of response from organizations, particularly in the arts district and particularly among the larger budget organizations, is acceptably high, although not complete. Thus it is reasonable to feel confident that the figures provided to quantify

the audience size and the financial impact of cultural businesses are generally accurate.

Seventy-two artists responded to the cultural census (additional responses are still being received, too late to be tallied for this report, although they will be added to the database so that it can remain current). This is a large response but, based on the consultant's knowledge of Portland, it seems to have a curiously low representation of performing artists and, even more dramatically, it seems skewed toward visual artists, as shown in Table 2 below. In addition, the information provided about artists' expenditures was often incomplete, with many individuals responding with comments rather than financial data. Thus the consultant believes that the figures provided for artists' financial impact are significantly understated.

Table 2: Types of Artists Responding to Census

Crafts	3	4.2%
Dance	2	2.8%
Design	5	6.9%
Literature	6	8.3%
Media Arts	1	1.4%
Multi-disciplinary	1	1.4%
Music	7	9.7%
Photography	1	1.4%
Theatre	5	6.9%
Visual Arts	41	56.9%
Total	72	

Cultural Spending

In order to understand arts and culture as an industry in Portland, it is necessary to get an overview of the range of cultural activity and this review of cultural spending will provide an important baseline. The consultant notes that the impact of cultural spending is extraordinarily large for a

community the size of Portland. The total direct impact is \$33,929,216 and is made up of four components:

- Organizations spent \$21,442,950 annually (of which 87.4 percent is generated by organizations within the arts district).
- The consultants calculated audience spending in the following manner:
 - According to the market survey (please refer to Supplement I of this report), 71 percent of arts attenders spend an average of \$22.86 per person for food and drink. Using the total paying audience figures from the cultural census, this represents an additional impact of \$9,700,040.
 - There are no figures for food and drink expenditures among the 360,190 attendees of *non-paid* events. To approximate this spending, the consultants conservatively estimate that the same percentage of attenders (71 percent) spent only 25 percent of the average from the market survey (\$5.72 per person) for an additional impact of \$1,462,804.

The total audience spending is therefore \$11,162,844.

- Over 1,800 volunteers devote over 85,000 hours each year to non-profit cultural organizations. Organizations themselves placed a value on this time and it represents an additional aggregate impact of \$849,425 annually.
- Artist expenditures amount to an additional \$473,997 annually, which as noted above, reflects incomplete, and therefore very conservative figures.

Portland's cultural sector is strong! With over 340 employees and an annual payroll in excess of \$9.8 million, cultural organizations represent an important presence, especially considering that 81 percent of the employees and 86 percent of the payroll expenditures are focussed in the general area of the arts district.

THE WOLF ORGANIZATION, INC.

**Table 3: Cultural Spending and Other Information
(Organization Census Question 5 and Artist Census Question 5)**

	In district	% of total	Not In district	% of total	Combined
# of orgs.	32	54.2%	27	48.5%	59
FTE employees	277.2	80.9%	65.5	19.1%	342.7
Payroll	\$8,488,008	86.2%	\$1,353,222	13.8%	\$9,841,230
Total org. income	\$21,379,896	89.5%	\$2,504,551	10.1%	\$23,884,447
Total org. expenditure	\$18,633,627	86.9%	\$2,809,323	12.6%	\$21,442,950
Audience spending	\$12,928,857	83.2%	\$2,617,282	16.8%	\$11,162,844
# of vol.	1,708	91.2%	165	8.8%	1,873
Vol. hours	71,780	82.9%	14,806	17.1%	86,586
\$ value of vol. time ¹	\$739,900	87.1%	\$109,525	12.9%	\$849,425
# of artists	25	34.7%	47	65.3%	72
Total artist expenditure	\$184,250	38.9%	\$289,747	61.1%	\$473,997
Total artist income ²	\$325,050	38.2%	\$526,178	61.8%	\$851,228

¹ Dollar value of volunteer time has been provided by cultural organizations.

² Note that total artist income may include funds reported on line for Total Organization Expenditures.

The cultural census includes nonprofit, for profit, and public enterprises that relate to arts and culture. In order to better portray the mix of organizations, Table 4, on the following page, provides information about nonprofit organizations and other groups responding to the census. The consultants note that the income and expenditures of the nonprofit organizations are in balance, with a small aggregate surplus of \$137,997. This indicates that Portland's cultural organizations are generally operating in an efficient manner.

**Table 4: Nonprofit Cultural Spending
(Organization Census Question 5)**

	Nonprofit orgs.	% of total orgs.	Other orgs.	% of total orgs.
# of orgs.	48	81%	11	19%
FTE				
employees	302.7	88%	40	12%
Payroll	\$9,004,230	91%	\$837,000	9%
Total org. income	\$20,198,447	85%	\$3,686,000	15%
Total org. expenditure	\$20,060,450	94%	\$1,382,500 ¹	6%

¹ A review of the data indicates that some of these organizations did not respond to this question, which means that this figure is understated.

There are several additional important points about the figures in Tables 3 and 4 that give some context for them:

- First, the figures reported in this census are conservative. All of them are derived from statistics gathered directly from cultural organizations and artists or from the recent market survey of arts attendees. They reflect only “direct” impact — wages and salaries paid to employees and goods and services bought from vendors. *None of these figures represent “multipliers” or other generic estimates of the “indirect” impact of cultural organization spending.* Indeed, attendance figures do not include New Year Portland, a major paid attendance event; this assures that the tallies provided are understated.
- The figures reported in this census are impressive. In the consultants’ experience, other cities that are substantially larger than Portland cannot boast of a cultural community of its size and impact.

Events and Audiences

The range of events in Portland is also impressive, with over 2,000 annually, of which 1,174 are free. The audience for these events is large — a total audience of 957,829, of which over 597,000 are paid and 360,000 free admissions. The concentration of activity in the downtown arts district is

significant, considerably more than in many communities the consultant has worked in. Indeed, 95.7 percent of the audience for free events participate within the arts district; over three-quarters (75.6 percent) of the paid admissions occur within the arts district.

**Table 5: Events and Audiences
(Organization Census Question 5)**

	In district	%	Not in district	%	Combined
# of paid events	443	50.3%	438	49.7%	881
# of free events	1,131	96.3%	43	3.7%	1,174
Total # events	1,574	76.6%	481	23.4%	2,055
Paying audiences	451,973	75.6%	145,666	24.4%	597,639
Non-paying audiences	344,600	95.7%	15,590	4.3%	360,190
Total audiences	796,573	83.2%	161,256	16.8%	957,829

Parking and Public Transportation

The issue of parking is a controversial one in Portland and the consultants have heard many comments about the impact of parking on the arts district. The cultural census requested information about parking in a variety of ways and the market survey of arts attenders also addressed the attitudes of arts attenders about parking (see Supplement I of this report). An analysis of respondents to the organizational census indicates that parking is not a problem. (Note that many organizations that responded had administrative spaces in this area which often require less parking space and this may have skewed the results.)

Well over half of the organizations in the arts district responding (57.7 percent) have no parking spaces dedicated to their use; as might be expected, the percentage drops dramatically outside the arts district (18.8 percent). Table 6 provides details of the number of parking spaces available to cultural organizations.

SUPPLEMENT II: PORTLAND CULTURAL CENSUS

**Table 6: Number of Parking Spaces
(Organization Census Question 3A)**

	In district	%	Not In district	%	Com- bined	%
None	15	57.7%	3	18.8%	18	42.9%
1 - 9	7	26.9%	4	25.0%	11	26.2%
10 - 19	1	3.9%	0	0%	1	2.4%
20 or more	3	11.5%	9	56.2%	12	28.5%
Total	26		16		42	

While many organizations had few or no parking spaces available to them, the vast majority of respondents in the arts district (79.3 percent) felt that access to parking was very easy or easy. Indeed, very few organizations (12.0 percent), either in or out of the arts district, found parking access hard or very hard. This finding suggests that the issue of parking may be more a problem among those who work outside the area, in particular audience members. Details of the responses to this question are provided in Table 7 below.

**Table 7: Access to Parking
(Organization Census Question 3B)**

	In district	%	Not In district	%	Com- bined	%
Very easy	15	51.7%	10	47.6%	25	50.0%
Easy	8	27.6%	4	19.1%	12	24.0%
Neutral	2	6.9%	5	23.8%	7	14.0%
Hard	2	6.9%	2	9.5%	4	8.0%
Very hard	2	6.9%	0	0.0%	2	4.0%
Total	29		21		50	

Finally the analysis indicates, as shown in Table 8 on the following page, that the overwhelming majority of cultural organizations in the arts

district find access to public transportation easy or very easy (89.3 percent). Again, it is not surprising that that figure drops to 30 percent outside of the arts district.

**Table 8: Access to Public Transportation
(Organization Census Question 3C)**

	In district	%	Not in district	%	Com- bined	%
Very easy	19	67.9%	4	20.0%	23	47.9%
Easy	6	21.4%	2	10.0%	8	16.7%
Neutral	2	7.1%	3	15.0%	5	10.4%
Hard	1	3.6%	2	10.0%	3	6.3%
Very hard	0	0%	9	45.0%	9	18.8%
Total	28		20		48	

It is interesting to consider this data in the context of several public meetings designed to bring together those with an interest in the arts district. Parking was identified as a significant problem by many participants in those sessions (particularly among retailers and event presenters), which appears to contradict these findings. The issue, however, has always represented a tension between the *perception* of a problem and the *reality* of one. The consultants believe that this analysis supports the notion that Portland's parking problem, at least in the area of the arts district, is one of perception rather than reality, since many individuals who are frequently in the arts district area do not have a problem with parking. However, the market survey suggests that audience members perceive a problem and that concern must be addressed as well.

Accessibility and Outreach

The census of cultural organizations gathered information about their degree of compliance with the Americans with Disabilities Act (ADA). The analysis indicates that more than half (57.6 percent) of the responding organizations either are not in compliance with ADA requirements or are only partially in compliance. Without additional information, it is

impossible to determine what the organizations indicating partial accessibility (which represents 40.9 percent of all respondents) will require to become fully accessible. This is an important follow-up question that should be explored in the next update to the cultural census database.

While these figures are troubling, it is important to keep in mind that the census is requesting information about organization's "home space," which in many cases is administrative office space. Thus, the accessibility of more public spaces may be higher than these findings suggest. Table 9, below, provides details on ADA accessibility.

**Table 9: ADA Accessibility of Organization's Home Space
(Organization Census Question 2G)**

	In district	%	Not in district	%	Com-bined	%
Yes	9	37.5%	10	50.0%	19	43.2%
No	4	16.7%	3	15.0%	7	15.9%
Partially	11	45.8%	7	35.0%	18	40.9%
Total	24		20		44	

The census of artists gathered information about artists' involvement in educational outreach activities. As Table 10A below shows, fully two-thirds of the artists who responded to the census participate in such activities. The consultant believes that this emphasizes that such activities are an important method for artists to gain exposure and supplement their income. (Note that additional information about artists is provided in Appendix B of this report.) It may be useful for future census updates to focus in more depth on the types of activities most commonly undertaken by artists since such activities could be a vital addition to the arts district and the City as a whole.

Table 10A: Artist Participation in Outreach Activities

Yes	48	66.7%
No	24	33.3%
Total	72	

Those artists who did participate in outreach activities were asked whether they volunteered or charged a fee for their services. The break-down was about even between the two (since 50 percent of respondents indicated that they did both on occasion) with slightly more artists volunteering their services, as shown below in Table 10B.

Yes, volunteer	13	27.1%
Yes, fee	11	22.9%
Yes, both	24	50.0%
Total	48	

Obstacles for Organizations

The cultural census of organizations asked a series of questions about obstacles to an organization's endeavors. In order to better understand the responses, the consultants examined several cross-tabulations of the tallies, including break-outs by budget size, location, and nonprofit status. In general the cross-tabulations were similar with no significant variations among the alternatives. However, since several of the questions were geared toward nonprofit organizations, the analysis in Table 11 on the following page eliminates the for-profit respondents and provides a summary of those *nonprofit* organizations that responded to the questions with a response indicating "some concern," "obstacle," or "serious obstacle." (A complete tally of the results for each of the eight questions, broken out by small and large budget nonprofit organization, is provided in Appendix F to this report.)

Table 11: Obstacles - tally of nonprofits responding “some concern,” “obstacle,” or “serious obstacle” (Organization Census Question 4)

	#	% responding
1. Inadequate funding/income	32	76.3%
2. Inconvenient parking	11	27.5%
3. Insufficient access to media/promotion	16	39.0%
4. Inadequate facility	14	36.9%
5. Shortage of display/exhibit/performance space	17	45.9%
6. Lack of strong advocacy for arts/culture	21	55.3%
7. Insufficient audience for arts/culture	19	51.3%
8. Lack of necessary business skills	11	27.5%

The following issues were of the greatest concern to the organizations that responded to the census:

- More than three-quarters (76.3 percent) of all organizations responding found *inadequate funding or income* to be an obstacle. Indeed, almost 60 percent (59.6 percent) — and fully 76.2 percent of the small budget organizations (those under \$100,000 annual budget) — ranked this as an “obstacle” or a “serious obstacle.”
- The *lack of strong advocacy for arts and culture* was cited as at least of some concern by over half of all the respondents (55.3 percent) and among large budget organizations, the figure rose to 63.1 percent. The related issue of insufficient audiences for arts and culture was cited as at least of some concern by 51.3 percent.
- Issues relating to facilities were a concern to respondents with almost half (45.9 percent) citing a *shortage of display, exhibition, or performance space* as at least of some concern, although the concern was substantially higher among small budget organizations (52.6 percent) than it was among large budget groups (38.9 percent) However, almost one-third of all respondents indicated this was an “obstacle” or a “serious obstacle.” In addition, 36.9 percent of all respondents

cited *inadequate facility* as at least a concern.

- Many organizations found *insufficient access to media and promotion* to be at least a concern — 39.0 percent of all respondents. It is interesting to note that the percentage is almost identical for large and small budget organizations, suggesting that, while the problems may vary for each group, the issue is an important one.

There were also several areas presented that were *not* concerns or obstacles to respondents. These include the following:

- Few respondents found *inconvenient parking* to be an obstacle to their endeavor — indeed fully 60 percent of both small and large budget organizations indicated that it was “not an obstacle.” This is an important finding and supports the tallies earlier in the section of the report on parking. Keep in mind that it must be considered in context — organizations answered these questions about their “home” space, which in many cases is administrative and the impact of parking may be of less concern.
- The *lack of needed business skills* was not generally felt to be an obstacle for small or large budget organizations. Fully 72.5 percent of participants responded that it was “not an obstacle” or “a minor concern.” It should be noted, however, that 20 percent of respondents from small budget organizations indicated this was an obstacle, compared to only 5 percent among large budget groups.

Obstacles for Artists

While the returns of census forms from organizations represents a substantial portion of that universe, the census forms from artists do not (based on the consultants’ observations of the artist population in Portland). With a significant slant toward visual artists (see Table 2 on page 7), it is difficult to know whether the tally of the question about obstacles is representative of artists generally. Nevertheless, many of the questions address concerns of artists across disciplines and an examination of the findings may be useful. (Note that many artists wrote comments in response to this question. Some of those remarks are included in this discussion and all of them are presented verbatim in Appendix G to this report.) A tally

of the number of artists responding to Question 3 about obstacles is provided in Table 12 below.

Table 12: Obstacles - tally of artists responding “some concern,” “obstacle,” or “serious obstacle” (Artists Census Question 3)

	#	% responding
A. Inadequate funding/income	40	66.7%
B. Inconvenient parking	14	23.8%
C. Insufficient access to media/promotion	31	50.0%
D. Inadequate facility	25	41.7%
E. Shortage of display/exhibit/performance space	37	59.7%
F. Lack of strong advocacy for arts/culture	32	54.2%
G. Insufficient audience for arts/culture	38	62.3%
H. Lack of necessary business skills	29	47.5%

Artists identified many more obstacles to their endeavors than organizations. In fact, many artists added additional concerns to those listed. While these are not included in this tally, they are included in Appendix G. In general the percentage of artists who responded “some concern,” “obstacle,” or “serious obstacle” was higher for all questions than for organizations. However, there were some similarities among the concerns. For example:

- *Inadequate funding/income* was the number one concern of both groups. Two-thirds (66.7 percent) of all artists responding found this to be an obstacle. This is less than among organizations (76.3 percent). The consultants note that 21.7 percent of responding artists indicated that this was “not a concern” which may reflect the fact that many artists supplement their income with other, more remunerative employment. For example, one artist wrote, “*The figures [on the cultural census form] represent my total life in art, which includes college level teaching...as well as studio work.*”

- Two related issues that were a concern for organizations also scored quite high among artists — *insufficient audience for arts/culture* was cited as at least a concern by 62.3 percent of respondents and the *lack of strong advocacy for arts and culture* was cited by 54.2 percent. Interestingly, while both of these figures are higher than those for organizations, they are of about the same ranking for both groups. This consistency points out significant areas of concern that should be probed in more detail in future updates of the census.
- *Shortage of display, exhibit, and performance space* was cited by 59.7 percent of respondents as at least of some concern, the third highest among the eight questions asked. This clearly suggests that space is a major concern for artists — something that has been clear throughout the planning process in meetings with artists and others. Many of the comments on census forms emphasize this concern. For example:
 - “Artists have low income — we cannot afford expensive work space.”
 - “The recent escalation of City taxes in the 90s has prevented expansion of [artist’s] facility/space...”
 - “I searched for ten months to find a ground floor studio in Portland ...[and I finally] gave up and took a space in Biddeford.”
 - “I live and work in my apartment; it is clean and cost-efficient, but totally inadequate for my needs.”

The concerns about space come as little surprise and have been addressed in detail in the consultants’ planning report. Note this concern is not limited to artists but is shared by organizations — *shortage of spaces* ranked fourth among the eight questions with 45.9 percent of organizations citing it as at least of some concern.

Finally, it is interesting to note that several issues that were not strong concerns among organizations ranked somewhat higher among artists. *Insufficient access to media and promotion* was cited as at least a concern by 50.0 percent of respondents and the *lack of necessary business skills* was cited as at least a concern by 47.5 percent of respondents. While falling at or slightly below the 50 percent level, these two areas represent substantial numbers of artists. Indeed these responses are common in cultural

communities across the nation and programs of technical assistance might be useful to address them.