



vibrant cultural life for all

ASC 2008-2013

arts & science council of charlotte-mecklenburg, inc.

2007-2008 BOARD OF DIRECTORS

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LATTA PLANTATION HOUSE + KITCHEN

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EXCELLENCE

“Our highest priority must be excellence. If we offer top quality programming, then participation, recognition and support will follow.”

Anna Spangler Nelson, Business, Community and Arts Leader

to our community:

For ASC, 2008 marks two very important events. First, we are celebrating our organization's 50th anniversary. Second, we begin implementing a new organizational roadmap initiated by our Board of Directors in 2007. As we move forward, the organization will be guided by:

- A new vision to shape a vibrant cultural life for all
- An updated mission to build appreciation, participation and support for the arts, sciences, history and heritage throughout Charlotte-Mecklenburg
- Two key strategic priorities to broaden the community's engagement and build long-term sustainability
- Success-defining strategic goals that include excellence, appreciation, participation, emerging creative activity, accessibility, diversity, healthy cultural institutions, a nurturing environment for artists, and growing resources

Engaging the community in the development of this plan was essential. ASC solicited input from a broad range of sources, including:

- Individual artists, scientists and historians
- Large and small cultural organizations
- Community non-cultural organizations which use art, science, history and heritage to achieve their mission
- Corporate and individual donors
- Corporate CEOs and community leaders
- Current ASC Board members and past ASC Board chairs

A variety of interactive techniques were utilized to generate input, including focus groups, one-on-one interviews, on-line surveys, and feedback/reaction sessions. In response to feedback, concepts and ideas were revised and improved. The Strategic Plan was further influenced by the 1998 Charlotte-Mecklenburg Cultural Action Plan and the 2005 ASC Audience Development Study.

This plan and the cultural vibrancy it strives to achieve would not have been possible without the support and commitment of our current Board of Directors, the direction of the Planning Oversight Committee, the coaching and facilitation of consultants Diane Mataraza and Janet Alford, and the continued generosity of corporate and individual donors and our public partners.

On behalf of ASC's Board and staff, we invite you to join us on this journey to a vibrant cultural life we hope will touch everyone in our community. We look forward to seeing you at a cultural event soon.

Sincerely,



Mark D. McGoldrick
BOARD CHAIR



Lenoir C. Keesler, Jr.
PRESIDENT & CEO

executive summary

BACKGROUND

In 1958 Charlotte-Mecklenburg was a community of 200,000 citizens with the beginnings of a cultural sector. Community leaders determined that developing a broader offering of arts and culture would help Charlotte grow, so they created the Charlotte Arts Fund, now known as ASC, to raise annual operating funds for a short list of cultural organizations serving the community.

Fast forward to 2008. Charlotte-Mecklenburg is a community of nearly 900,000 citizens in a growing region of more than 1.6 million people. It is home to nine Fortune 500 corporations and a growing business community whose need for talent requires an attractive quality of life. Annually, 80,000 newcomers move to the region. Suburban Mecklenburg has experienced explosive growth, and the Center City is rapidly developing and expanding. The demographics of Mecklenburg County grow more diverse every year. ASC must reflect and serve this changing community.

As the city, county and region have grown, so has the cultural sector. The community and its leaders have built cultural institutions and facilities, financial resources, a model partnership between the public and private sectors,

and ASC as a central leadership organization. In classic Charlotte can-do style, the sector has been built primarily from the top down, and appears and feels institutional. Investment and activity have focused on the supply and suppliers of arts and cultural services. A successful and unified approach to fundraising has well served the growth of the sector.

Charlotte's cultural platform compares and competes well with regions its size across the country. Today's sector provides a formidable base from which to develop true cultural vibrancy. Yet the sector, with its significant assets and strengths, has opportunities that are undeveloped.

WHERE NEXT?

As we enter our 50th year, ASC aspires to shape a vibrant cultural life that touches everyone in the community. To guide our path to that vision, we have paused to ask five important questions:

- Who are we?
- Whose are we?
- What are we called to do?
- Where do we go from here?
- What does success look like?

Answers to these provide the framework for the organizational roadmap that will guide our work for the next five years.

WHO ARE WE?

ASC's identity remains what it has been for many years.

We are:

- The community's chief advocate for arts, science, history and heritage
- A gatherer and steward of public and private community resources
- An investor of those resources into the cultural sector and community
- The strategic planner for the community's cultural sector
- The public art agent for the city and county

ASC is evolving from solely a fundraising vehicle in which success has been measured by dollars raised, to an investment vehicle in which success will be measured by the impact of deploying those same dollars. Gathering resources remains no less important, and will serve as a critical input rather than the defining outcome for the organization.

WHOSE ARE WE?

When ASC was created, it served two principal constituencies: 1) a small but growing donor community and 2) eight cultural institutions to which dollars were distributed.

When ASC began receiving public financial support in 1976, its constituency base expanded to include all of Mecklenburg County. Today, ASC collaborates with many partners to deliver arts, science, history and heritage programs across the community. To be sure, leading the list of partners are the community's larger arts, science, history and heritage organizations. However, smaller cultural organizations and creative individuals are also partners, as are the city, county and Mecklenburg towns; local colleges and universities; and community organizations which do not have arts, science, history or heritage in their mission, but which utilize cultural programming to achieve their missions. ASC has important relationships with, and responsibilities to, all of these partners.

Likewise, ASC has responsibilities to all of its funding stakeholders. On the public side, the city, county, towns and North Carolina Arts Council provide more than \$4 million in annual support. Corporate and business donors and 40,000 individual contributors provide an additional \$11.5 million in funding each year. ASC has a responsibility to be accountable and responsive to all of these funders.

To build appreciation, participation and support for the arts, sciences, history and heritage throughout Charlotte-Mecklenburg.



As the community and ASC have grown, so has the list of partners and funders. While our larger cultural institutions will likely always dominate the distribution of funding from ASC, the voices and interests of all partners are important.

WHAT ARE WE CALLED TO DO?

Building on the 1998 Cultural Action Plan and the audience development work done by ASC in 2005 and 2006, our updated mission focuses squarely on broadening engagement between our organization, the sector and the community:

To build appreciation, participation and support for the arts, sciences, history and heritage throughout Charlotte-Mecklenburg.

Appreciation, participation and support provide the framework for goals, strategies, tactics and activities.

WHERE DO WE GO FROM HERE?

The plan that follows supports two key strategic priorities as we move forward:

1. BROADEN THE COMMUNITY'S ENGAGEMENT:
 - Increase awareness and appreciation
 - Help cultural (arts, science, history and heritage) providers attract audiences
 - Stimulate demand and drive increased participation
 - Ensure greater access
 - Encourage participants to become financial supporters

ASC strives to engage every Mecklenburg County citizen in a cultural community that has something for everyone. We will also increase our commitment to market the sector, using collaborative marketing tactics and public relations to drive appreciation and participation.

2. BUILD LONG-TERM SUSTAINABILITY:

- Increase investments in strategic advancement opportunities
- Expand professional and skill development offerings for staffs and boards
- Expand services to the cultural sector

ASC will continue to provide significant unrestricted operating support, and will broaden its mix of support for individuals and organizations to help them build earned and contributed income capabilities, enhance programming excellence, achieve performance goals, and ensure long-term sustainability.

Building upon the workplace campaign model that has been successful for our community, we will broaden our overall fundraising approach to focus on annual and long-term funding, and employ new cultivation activities supported by targeted data-mining and technology. Gathering financial resources is a strength of the organization, and will remain so as we advance to the next level.

Finally, ASC will have an organizational “tune-up” to ensure alignment with the strategies. We will examine and improve all business infrastructure systems as needed, position our organization and human capital to support plan objectives, and update the organization’s governance model.

WHAT DOES SUCCESS LOOK LIKE?

Through this plan, ASC is helping to create a more vibrant cultural life for our community. The outcome is framed by the following goals and objectives:

BUILD APPRECIATION:

- Advance excellence in all creative endeavors.
- Grow appreciation for the role of creativity in our community.

BUILD PARTICIPATION:

- Grow community participation in cultural education and programs.
- Increase innovative, emerging creative activity that engages audiences.
- Expand cultural activity that is accessible to and reflective of our changing community.

BUILD SUPPORT:

- Foster healthy cultural institutions that have the capacity to operate and sustain themselves.
- Foster an environment to attract and grow the number of creative individuals who live and work in our community.
- Strengthen existing resources and cultivate new ones to support increased cultural activity.

Progress in each goal area will be measured on a regular basis, and results will be shared broadly and regularly with the community.

our vision:

Shaping a vibrant cultural life for all.

our mission:

To build appreciation, participation and support for the arts, sciences, history and heritage throughout Charlotte-Mecklenburg.

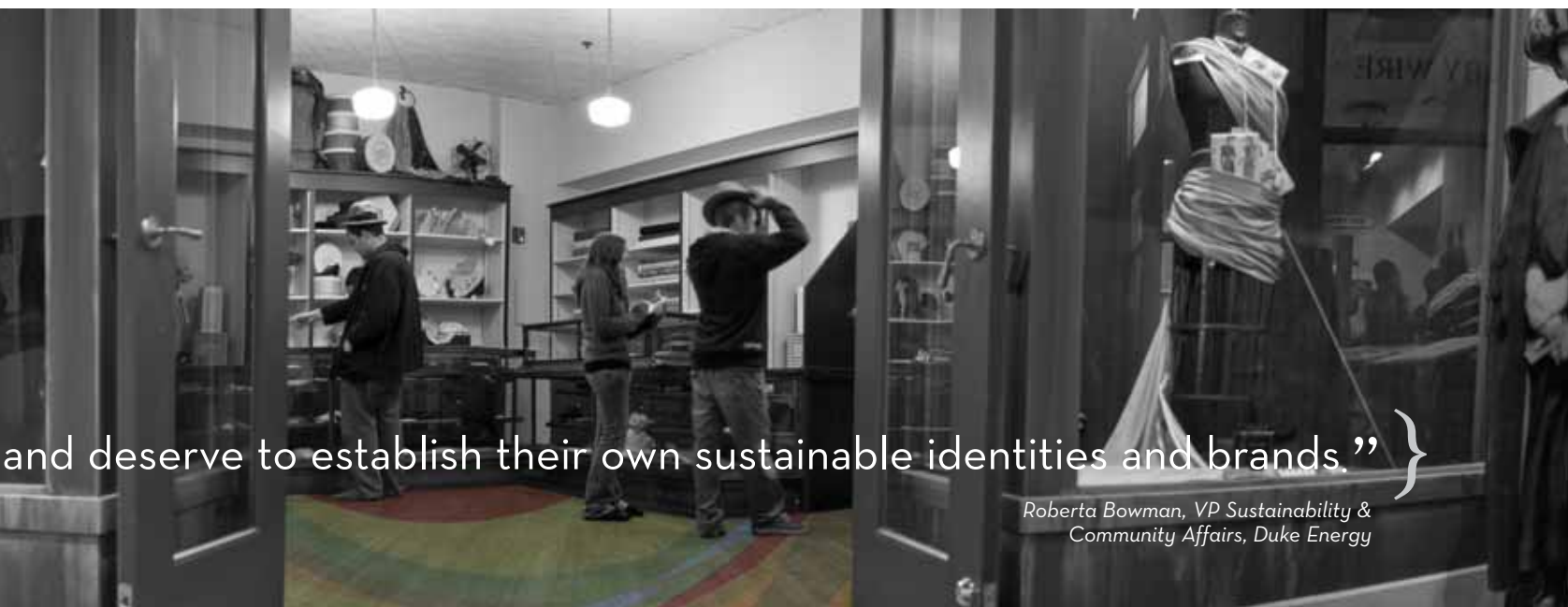
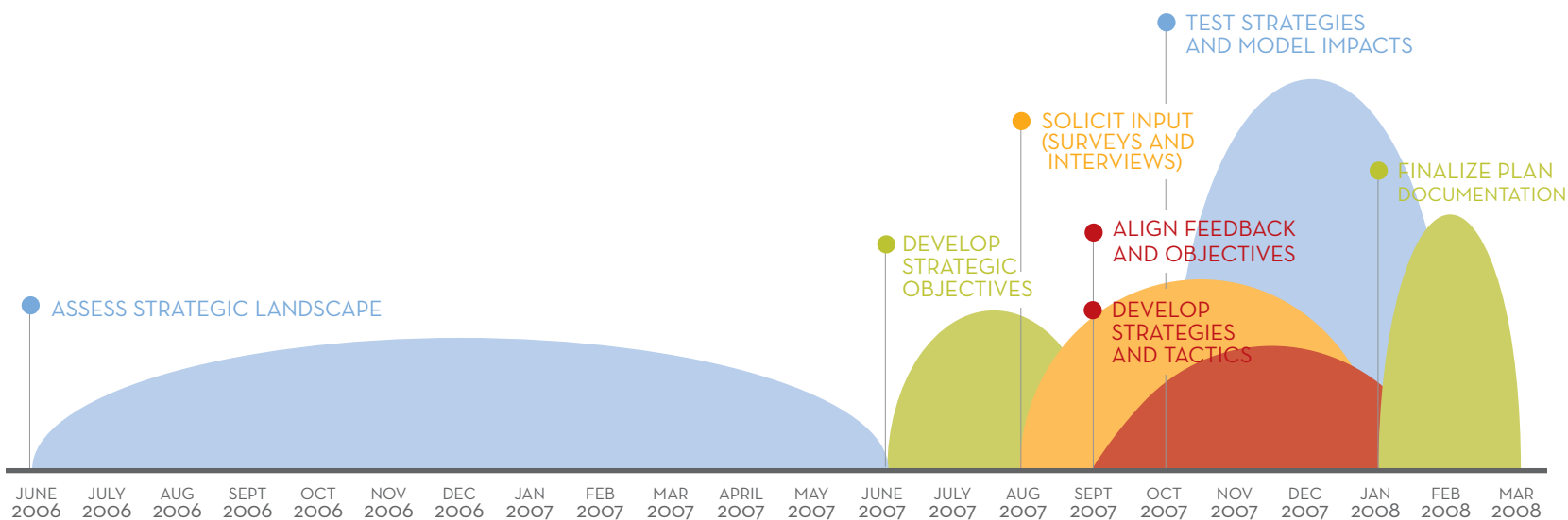


“Our community’s cultural organizations need

planning process outline

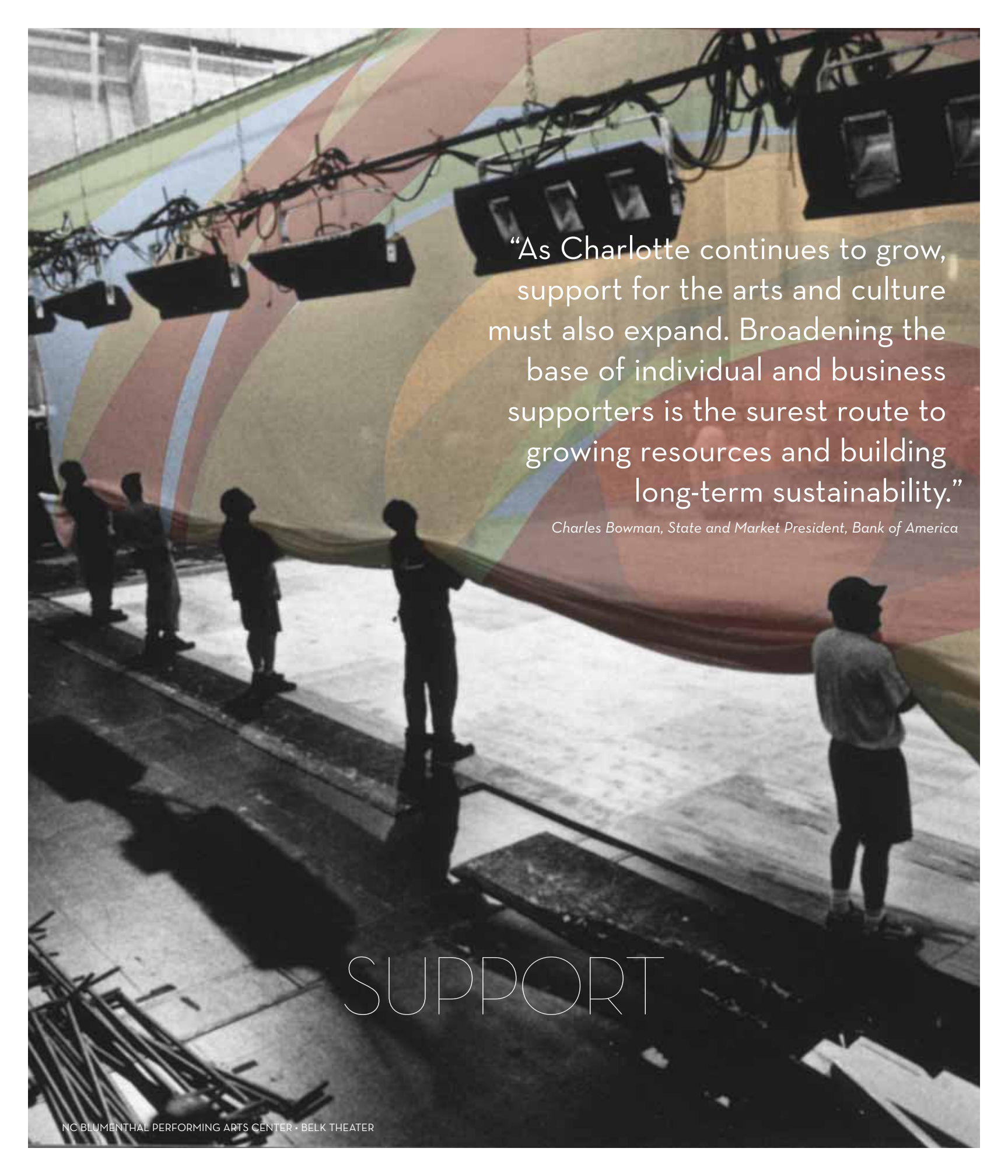
See Appendix (page 64) for narrative description of the process methodology.

- Assess strategic landscape June 2006 - June 2007
- Develop strategic objectives June 2007 - Sept 2007
- Solicit input (surveys and interviews) Aug 2007 - Jan 2008
- Align feedback and objectives Sept 2007 - Feb 2008
- Develop strategies and tactics Sept 2007 - Feb 2008
- Test strategies and model impacts Oct 2007 - Feb 2008
- Finalize plan documentation Jan 2008 - Mar 2008



and deserve to establish their own sustainable identities and brands.” }

Roberta Bowman, VP Sustainability & Community Affairs, Duke Energy



“As Charlotte continues to grow, support for the arts and culture must also expand. Broadening the base of individual and business supporters is the surest route to growing resources and building long-term sustainability.”

Charles Bowman, State and Market President, Bank of America

SUPPORT

“With ASC’s additional support, artists will play an essential part in keeping our community competitive.”

*Jennifer Appleby, President & Chief Creative Officer,
Wray Ward and ASC Board Member*

strategic plan overview

MAJOR INITIATIVES BY STRATEGIC OBJECTIVE

Each of the eight strategic objectives related to the definition of a vibrant cultural life is supported by a series of cross-functional and functional strategies and tactics that will be executed over the next five years. When viewed in its entirety, the initiatives can be summarized into two key themes:

- Broadening engagement with the community
- Helping the cultural sector build sustainability through increased capacity and skills

This section includes an excerpt of some of the key initiatives aligned to each of the four strategic goals:

- I. Build Appreciation
- II. Build Participation
- III. Build Support
- IV. Update and Enhance ASC Operations

A full itemization of all the strategies and tactics is included in Section IV.

GOAL I: BUILD APPRECIATION

Appreciation is a state of awareness of and the recognition of the aesthetic value of something. ASC will lead efforts to increase the community’s appreciation of Charlotte-Mecklenburg’s arts, science, history and heritage offerings. Research indicates that increased appreciation and understanding of cultural activities will lead to increases in participation and, ultimately, financial support.

2007 Cultural Life in Mecklenburg County Survey, UNC Charlotte Urban Institute Report, indicated:

- 93.3% of respondents think arts, science and history organizations make a positive contribution to the quality of life in Charlotte-Mecklenburg
- 86.3% think arts, science and history organizations and programming make Charlotte-Mecklenburg more attractive to businesses and individuals considering relocation to the area
- 79.8% support local government funding for arts, science and history programs

“Participation in arts and cultural activities creates economic impact, helps children of all ages learn, attracts visitors to our community, enables us all to grow creatively, and contributes income – all of which ultimately strengthen sustainability for cultural providers.”

Mike Rizer, Director of Community Relations, Wachovia



Increased appreciation will be achieved through several key initiatives:

- Advance excellence
 - Incent and reward excellence in the offerings and operations of Charlotte-Mecklenburg’s arts, culture, science and heritage providers (organizations and individuals). This will be accomplished through enhanced investment review criteria, recruiting regional and national peer professionals for operating investment review panels and introducing a new funding program, Advancement Awards.
- Grow appreciation for the role of creativity
 - Market Charlotte-Mecklenburg’s vibrant cultural life as a “must see experience” for residents and tourists.
 - Leverage public art offerings as a greater player in and contributor to community and economic development.
 - Establish ASC Honors program to recognize lifetime achievement in arts, science, history and heritage.

GOAL II: BUILD PARTICIPATION

The Charlotte community historically has not taken full advantage of all the cultural offerings available to it. ASC seeks to increase participation in our rich arts, science, history and heritage programs through the execution of an intentional and targeted marketing and public relations plan. The plan will aim to share the message that vibrant and diverse cultural opportunities abound in this community and that participation is a valuable investment of personal time.

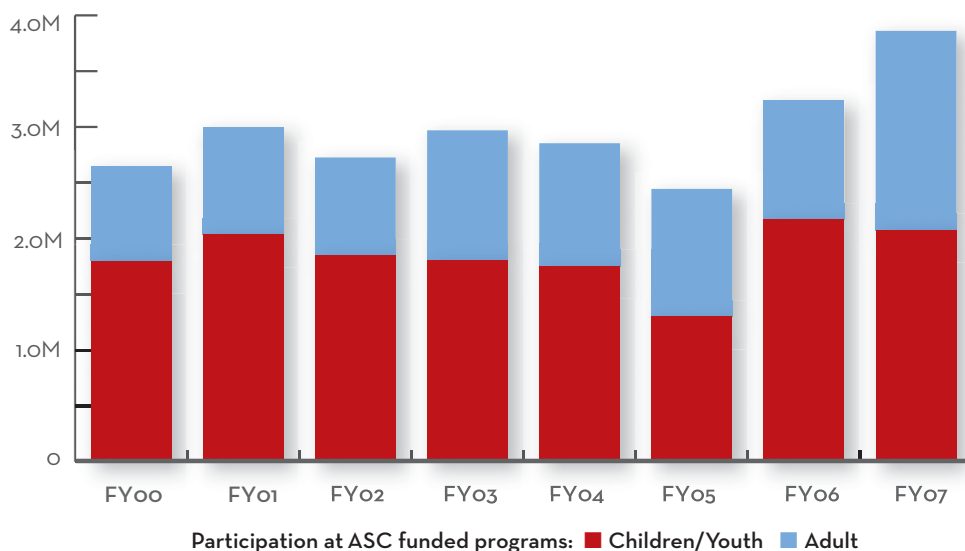
In addition to broad distribution of information regarding the availability of programming, ASC will continue to assess, through market research, the demand of the community for innovative and emerging activity that will speak to residents and visitors. To ensure that programming is available to all residents, ASC will promote and advocate for the accessibility of activities as it relates to pricing, geography, ethnicity and language. Market data indicates that a barrier to participation is often tied to one's understanding of or comfort level with the programming. To overcome such barriers, arts and cultural education is critical for all. ASC will convene a task force to assess the state of arts education in the schools and will encourage lifelong learning through adult educational offerings.

ASC seeks to increase participation in Charlotte-Mecklenburg's arts, science, history and heritage offerings through the following strategic objectives:

- Grow community participation in cultural education and programs.
 - Develop marketing plans to promote www.CharlotteCultureGuide.com, cross-organizational ticket promotions, cultural tourism and media relations.
 - Increase marketing and development skills throughout the cultural community via workshops and training sessions.
- Increase innovative, emerging creative activity that engages audiences
 - Invest in creative innovation through increases in Regional Artist Project Grants and the initiation of Creative Renewal Fellowships for creative individuals and cultural administrators.
- Expand cultural activity that is accessible to and reflective of our changing community
 - Leverage success of Latino Project Investments from FY 2007 into other diverse segments of the community.

As a result of these initiatives and others, ASC anticipates positive trends in participation rates in the upcoming years.

participation trends • FY00-FY07



GOAL III: BUILD SUPPORT

ASC is committed to seeing private and public support, both direct financial support and indirect capacity-building support: increase to sustain and grow healthy arts, science, history and heritage providers in Charlotte-Mecklenburg.

More focus on and attention to donor retention and cultivation is critical to increase the revenue necessary to support forecasted investments. ASC will align its development and fundraising efforts with the goal of increasing a larger proportion of its support from outside the Annual Fund Drive without sacrificing any of the success of the annual campaign.

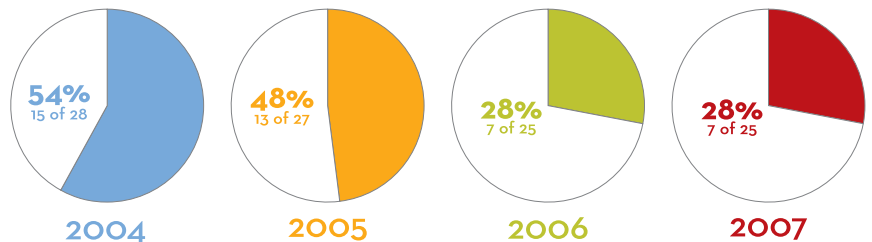
Support will also extend to nurturing conditions for creative individuals through affordable housing, work space and financial support.

ASC seeks to increase support of Charlotte-Mecklenburg’s arts, culture, science and history offerings through three primary strategic objectives and their supporting sub-activities:

1. Foster healthy cultural providers that have the capacity to operate and sustain themselves.
 - Expand professional skill development and training to include a comprehensive and sequential curriculum for staff and board members of all disciplines and sizes.
 - Introduce a new investment channel, Advancement Awards, to allow investment in initiatives and projects that strategically advance arts, science, history or heritage organizations.

ECONOMIC IMPACT OF THE NONPROFIT ARTS INDUSTRY: Mecklenburg County Compared to Similarly Populated Study Regions with Populations of 500,000 to 999,999 (Listed by Population in Ascending Order)			
STUDY REGION	2005 POPULATION	TOTAL INDUSTRY EXPENDITURES (ORGANIZATIONS & AUDIENCES)	FULL-TIME EQUIVALENT JOBS
Nashville-Davidson County, TN	549,110	\$198,544,234	5,667
Seattle, WA	573,911	\$330,417,144	7,992
Baltimore, MD	635,815	\$270,075,571	6,418
Austin, TX	690,252	\$271,694,936	8,625
Louisville-Jefferson County, KY	699,827	\$259,523,741	7,892
Raleigh-Wake County, NC	748,815	\$105,762,880	3,983
Indianapolis, IN	784,118	\$468,840,184	15,088
Charlotte-Mecklenburg, NC	796,372	\$157,959,774	4,771
Greater Hartford, CT	877,393	\$244,073,484	7,381
Milwaukee County, WI	921,654	\$235,409,042	7,412

Source: Arts & Economic Prosperity III, Americans for the Arts, 2007, www.AmericansForTheArts.org



- Implement collaborative purchasing programs to leverage cultural organizations' investments in products and services (office supplies, technology products, insurance, banking products, etc.) and research the benefits (financial and productivity) of shared platforms for support functions including Finance, HR, Technology and Marketing.
2. Foster an environment that attracts and grows the number of creative individuals who live and work in the community.
 - Expand workshop and training opportunities for individual artists and creative individuals.
 - Provide leadership and advocacy for affordable living, working and performance spaces, in partnership with other cultural, public and private sector advocates.
 3. Strengthen existing resources, and cultivate new ones, to support increased cultural activity.
 - Grow the ASC Annual Fund Drive through donor retention and cultivation of new donor relationships throughout the county.
 - Secure additional funding from sources outside the Annual Fund Drive (including, but not limited to, online giving, major gift strategies, planned giving, unrelated business income, etc.).
 - Partner with city, county, municipal and state representatives to increase public funding investments in the cultural sector by identifying community needs that can be addressed or advanced through cultural offerings.

“A vibrant cultural life helps to attract talented employees and clients. For our firm, it’s a business reality - there is a connection between a sophisticated quality of life and operating a sophisticated legal practice.”

Gene Pridgen, Managing Partner, Kennedy Covington

number of arts, science, & history organizations with an unrestricted operating deficit:
NET OF DEPRECIATION

GOAL IV: UPDATE AND ENHANCE ASC OPERATIONS

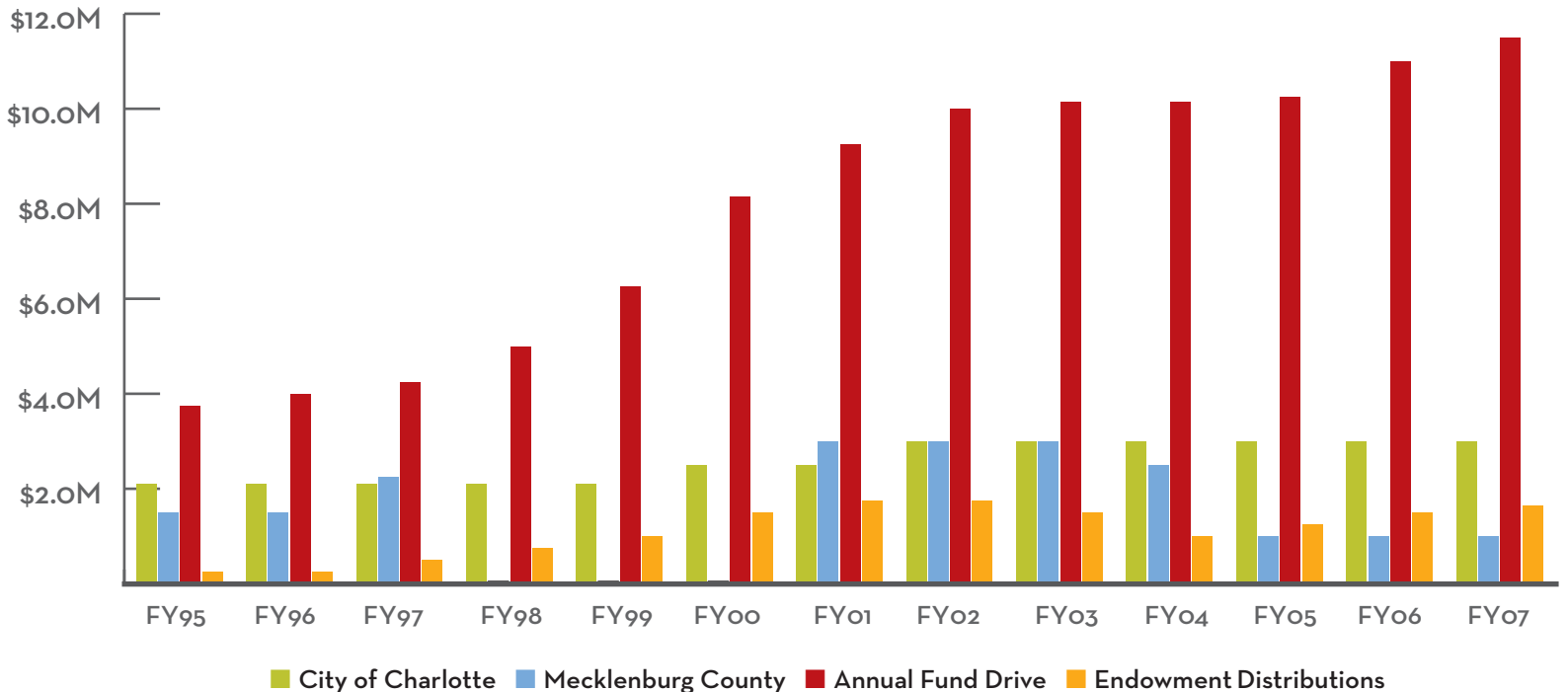
ASC will align its internal operations and infrastructure to ensure that the organization can increase appreciation, participation and support of Charlotte-Mecklenburg’s arts, science, history and heritage community. In order to do so, ASC will continually review efficiency and effectiveness in its own operations and implement process-improvement initiatives as appropriate.

ASC will strengthen its operations to implement the Strategic Plan:

- Encourage efficiency and effectiveness in ASC operations and systems
 - Align and scale ASC human resources with plan goals and activities

- Improve ASC’s office environment to foster creativity by identifying and designing open office space that encourages innovation, collaboration and flexibility
- Develop a 5-year technology plan that includes assessment of organizational needs in contact management, research tools, donor databases and business continuity
- Strengthen governance and capacity of the Board to lead the plan

asc annual revenue trends • FY95-Fy07



fiscal 2009 major initiatives

The comprehensive strategic initiatives are significant in scope and impact. The strategic plan has prioritized the following activities for the year ending June 30, 2009:

INITIATIVE	DEPARTMENTAL OWNER	INCREMENTAL OPERATING COSTS	HUMAN-CAPITAL NEEDS
Implement the new cultural and community investment distribution system	Cultural & Community Investment	None	No incremental staffing required
Aggressively work with CMS toward adoption of goals related to preK-12 cultural education as recommended in the 1998-2003 Cultural Action Plan	Cultural & Community Investment	None	No incremental staffing required
Enhance professional skill development curriculum to address needs throughout the cultural sector	Cultural & Community Investment	Incremental investment of \$50,000 for FY 2009 (increasing in future years)	No incremental staffing required
Initiate a major gifts strategy	Development	Research cost of no more than \$5,000	Half an FTE in FY 2009 to ensure return on investment in future years
Evaluate programming activities and secure funding through underwriting or sponsorship	Development	None	No incremental staffing required
Broaden engagement of donors in Annual Fund Drive by targeting companies not currently participating	Development	None	No incremental staffing required; ASC Board involvement required

FISCAL 2009 MAJOR INITIATIVES - CONTINUED

INITIATIVE	DEPARTMENTAL OWNER	INCREMENTAL OPERATING COSTS	HUMAN-CAPITAL NEEDS
Increase public sector investment in the cultural community	Executive and Cultural & Community Investment	None	No incremental staffing required
Leverage combined purchasing power of cultural organizations and investigate opportunities for shared resources	Finance	None	No incremental staffing required
Identify and secure new ASC office space	Finance	Capital improvement costs have been reserved	No incremental staffing required
Develop a 5-year technology plan	Finance	Plan design costs of \$15,000; annual budget averages \$50,000 for technology investments	No incremental staffing required
Redesign ASC Web site to increase ease of use and enhance content available to donors, cultural partners, artists and other key constituents	Marketing and Communications	\$50,000 has been secured; if actual requirements exceed budget, the difference would need to be secured	New FTE for Marketing required for this and other marketing initiatives
Develop a comprehensive marketing and communications plan to build participation in cultural programming and events	Marketing and Communications	\$48,000 for PR firm in FY 2009 (increasing in future years)	New FTE for Marketing required for this and other marketing initiatives

Total Incremental Costs for FY 2009
\$118,000
1.5 FTEs

HOW WE MEASURE SUCCESS

Planning for **how** ASC will measure successful execution against strategic goals, objectives and activities is integral to the plan. The following outlines the key strategic measures of success:

STRATEGIC OBJECTIVE	METRICS TO MEASURE SUCCESS
BUILD APPRECIATION	a. Annual trends in responses to UNC Charlotte Urban Institute Cultural Survey questions
BUILD PARTICIPATION	a. Number of participants in cultural events and programs as reported by Cultural Partners b. Number of visits to CharlotteCultureGuide.com
BUILD SUPPORT	a. Aggregate earned and contributed revenue trends of arts, science and history providers (ASC revenue included) b. Percent of Cultural Partners receiving annual operating support whose annual unrestricted revenues exceed expenses c. Number of participants in professional skill development programming (year-over-year)

“It is exciting to see ASC support new and creative artistic activity such as the Latino Initiative in 2007. These efforts add richness and texture to the cultural fabric of our community, and create opportunities for people of different backgrounds and nationalities to experience art, science, history and heritage together.”

*Carlos Sanchez, Executive Vice President,
AT&T North Carolina*

“I would like to see Charlotte become more welcoming for artists and people making their living in the arts and culture.”

Curt Walton, City Manager, City of Charlotte

PARTICIPATION



strategies and tactics

GOAL I. BUILD APPRECIATION

A1 OBJECTIVE: ADVANCE EXCELLENCE IN ALL CREATIVE ENDEAVORS.

A1.A Strategy: Stimulate and reward excellence in Charlotte-Mecklenburg arts, science and history providers' (organizations and individuals) offerings and operations.

	Tactics	Timing	Staff/Board	Partners	Direct costs/resources	Outcome (metrics)
A1.A.1	<p>Implement the new cultural and community investment distribution system.</p> <p>Facilitate successful transition of current grantees from the old to new system.</p> <ul style="list-style-type: none"> • Work with each funded arts, science and history provider to develop an individually tailored transition plan. • Identify an ASC relationship manager for each funded partner to ensure smooth transition and open communication. • Ensure that review criteria reflect and reward investment goals of: <ul style="list-style-type: none"> - Excellence and innovation - Impact and customer service - Leadership and sustainability 	2008-2013	<ul style="list-style-type: none"> • Cultural and Community Investment (CCI) • Organizational Advancement Committee 	<ul style="list-style-type: none"> • Funded arts, science and history providers 	<p>Organizations: FY08 - \$11MM FY13 - \$12MM</p> <p>Community-Based: FY08 - \$430,000 FY13 - \$850,000</p>	<p>All arts, science and history providers benefit from ASC investment, assistance and support services.</p> <p>Excellence and caliber of arts, science and history offerings improve.</p> <p>Art, science and history assessment surveys tell us investment services are valuable.</p> <p>Affiliate and Associate designations end.</p> <p>ASC investment goals are aligned with each arts, science and history provider's financial and operating capacity goals.</p>

GOAL I. BUILD APPRECIATION

	Tactics	Timing	Staff/Board	Partners	Direct costs/resources	Outcome (metrics)
A1.A.2	<p>Utilize peer review to ensure that excellence is the foundation for investment decision-making.</p> <p>Recruit regional and national professionals in arts, sciences and history to serve with ASC Organizational Advancement committee members in decision-making.</p> <p>Increase emphasis on industry standards, collaboration and partnership building, best practices and other non-profit model operating behaviors, practices and systems.</p>	2008-2013	<ul style="list-style-type: none"> • CCI • Organizational Advancement Committee 	<ul style="list-style-type: none"> • N.C. Center for Non-profits • National service organizations • Peer local arts councils • Peer united arts funds • Non-profit Finance Fund 	No incremental cost to be incurred.	<p>Excellence of arts, science and history offerings improve.</p> <p>Audience participation increases.</p> <p>Individual giving to organizations increases.</p> <p>Increased linkage between financial investments and program excellence.</p>

A1.B Strategy: Strengthen ASC's connection with arts, science and history providers and creative individuals in Charlotte-Mecklenburg.

	Tactics	Timing	Staff/Board	Partners	Direct costs/resources	Outcome (metrics)
A1.B.1	<p>Increase arts, science and history providers' and creative individuals' awareness of, and access to, ASC and its investment and service opportunities.</p> <p>Expand investment portfolio offerings to all of the above according to Table A.1.</p>	2009-2013	<ul style="list-style-type: none"> • CCI • Executive Marketing & Communications • Organizational Advancement Committee 	• Art, science and history providers	See Investment Forecast in Section V.	Art, science and history as well as creative individual assessment surveys tell us that providers see ASC as a valuable resource.

	Tactics	Timing	Staff/Board	Partners	Direct costs/resources	Outcome (metrics)
A1.B.2	Re-design ASC's Web site into the definitive resource for all arts, science and history providers.	2009	<ul style="list-style-type: none"> • CCI • Marketing & Communications 	<ul style="list-style-type: none"> • Marketing agency 	\$50,000 has been reserved for Web site re-development.	<p>Numbers of arts, science and history providers assisted and serviced by ASC increases.</p> <p>Arts, science and history providers have the support they need to help them succeed.</p>
			<ul style="list-style-type: none"> • Marketing Committee 			
A1.B.3	Promote ASC's Web site to creative individuals in order to build awareness of ASC services.	2010	<ul style="list-style-type: none"> • CCI • Marketing & Communications 	<ul style="list-style-type: none"> • Creative Individuals 	TBD	<p>Number of visitors to data on ASC's Web site increases annually.</p> <p>ASC support services receive high marks in user evaluation.</p>

A1.C Strategy: Achieve national recognition for ASC's Public Art Program in Charlotte-Mecklenburg by 2013.

	Tactics	Timing	Staff/Board	Partners	Direct costs/resources	Outcome (metrics)
A1.C.1	Cultivate private developers to include public art in their community expansion plans.	2009-2013	<ul style="list-style-type: none"> • CCI 	<ul style="list-style-type: none"> • Towns • City • County • Private developers 	Minimal	<p>Charlotte-Mecklenburg is recognized widely for its distinctive public art integral to community design.</p> <p>The built environment is more attractive.</p> <p>The number of public art pieces supported by the public and private sectors increases.</p>
			<ul style="list-style-type: none"> • Public Art Commission 			

GOAL I. BUILD APPRECIATION

	Tactics	Timing	Staff/Board	Partners	Direct costs/resources	Outcome (metrics)
A1.C.2	<p>Create a publication of Charlotte-Mecklenburg's public art collection.</p> <ul style="list-style-type: none"> Build on the strength of recommendations of the 2002-2007 Public Art Master Plan. 	2013	<ul style="list-style-type: none"> CCI Public Art Commission 		Investment in design, production and printing would be less than \$15,000, a portion of which could be re-couped through book sales.	<p>Charlotte-Mecklenburg successfully documents its public art and promotes its distinct community aesthetic.</p> <p>Publication is marketed regionally through local museums, bookstores and visitor centers.</p>
A1.C.3	<p>Evaluate and assess the success of 2002-2007 Public Art Master Plan upon its 10th Anniversary.</p>	2011	<ul style="list-style-type: none"> CCI Public Art Commission 	<ul style="list-style-type: none"> City County 	Consulting costs of \$10,000	<p>2002-2007 <i>Public Art Master Plan's</i> 28 recommendations and outcomes are in place or achieved.</p>
A1.C.3.a	<p>Act on assessment results. This action may consider expansion of the program as previously recommended both geographically and financially. (See A1.C.3)</p>	2012-2013	<ul style="list-style-type: none"> CCI Public Art Commission 	<ul style="list-style-type: none"> City County Towns 	TBD	<p>2002-2007 <i>Public Art Master Plan's</i> 28 recommendations and outcomes are in place or achieved.</p>

A2 OBJECTIVE: GROW APPRECIATION FOR THE ROLE OF CREATIVITY IN OUR COMMUNITY.

A2.A Strategy: Market Charlotte-Mecklenburg's vibrant cultural life as a "must-see experience."

	Tactics	Timing	Staff/Board	Partners	Direct costs/resources	Outcome (metrics)
A2.A.1	<p>Promote and communicate what is new and dynamic in Charlotte.</p> <ul style="list-style-type: none"> • Develop research to learn what is driving attendance. • Develop messaging and disseminate to residents and tourists. 	2010-2013	<ul style="list-style-type: none"> • Marketing & Communications • Marketing Committee 	<ul style="list-style-type: none"> • Charlotte Regional Visitors Authority (CRVA) • Charlotte Chamber of Commerce 	Research costs estimated at \$10,000 and agency design costs estimated at \$10,000.	<p>Number of participants at events and programs as reported by arts, science and history providers annually increase.</p> <p>Number of visits to www.CharlotteCultureGuide.com meets annual goal increases.</p>

A2.B Strategy: Leverage public art as a greater player and contributor to community and economic development efforts.

	Tactics	Timing	Staff/Board	Partners	Direct costs/resources	Outcome (metrics)
A2.B.1	<p>Continually sharpen the community-building methodology around all public art projects to build residents' awareness, ownership and pride.</p>	2008-2013	<ul style="list-style-type: none"> • CCI • Marketing & Communications • Public Art Commission 	<ul style="list-style-type: none"> • City/County Planning 	No additional resources	<p>2002-2007 <i>Public Art Master Plan</i> goals are achieved.</p> <p>Public art pieces are "cared-for-sources-of-pride" in their communities.</p>

GOAL I. BUILD APPRECIATION

A2.C Strategy: Articulate the benefits of Charlotte-Mecklenburg's creative community.						
	Tactics	Timing	Staff/Board	Partners	Direct costs/resources	Outcome (metrics)
A2.C.1	<p>Increase awareness among Charlotte-Mecklenburg's business and civic leadership.</p> <ul style="list-style-type: none"> • Coordinate with the Charlotte Chamber of Commerce to ensure that cultural economic development is included in the annual inter-city agenda. • Encourage trips by cultural partners' board and staff to visit peer city cultural venues. 	2008-2013	<ul style="list-style-type: none"> • CCI • Executive 	<ul style="list-style-type: none"> • Charlotte Chamber of Commerce • Other peer cities nationally 	None	<p>Awareness and appreciation of Charlotte's cultural offerings from business leaders increases.</p> <p>Annual Fund Drive donor base and financial support increases.</p>
A2.C.2	<p>Encourage and promote opportunities for art and design, history and science students to interface more with Charlotte-Mecklenburg's business and industry sector.</p>	2010-2013	<ul style="list-style-type: none"> • CCI • Executive 	<ul style="list-style-type: none"> • Charlotte Chamber of Commerce • Proposed CEO's Quality of Life Committee • Educational institutions 	Minimal, possible shared cost of hosting event.	<p>Increased awareness of career opportunities in Charlotte-Mecklenburg for creative workers.</p> <p>Increased local businesses' knowledge and awareness of skill set of graduates.</p>
A2.C.3	<p>Partner with business and industry to conduct a creative individual inventory in Charlotte-Mecklenburg.</p> <p>Pattern after Maricopa Partnership for Arts and Culture's <i>Creative Connections: Arts Ideas & Economic Progress in Greater Phoenix</i> and Richard Florida's Creative Class.</p>	2010	<ul style="list-style-type: none"> • CCI • Marketing & Communications 	<ul style="list-style-type: none"> • Charlotte Chamber of Commerce • UNC Charlotte Urban Institute 	Undetermined; cost of research is under investigation by the UNC Charlotte Urban Institute.	Increased understanding of what helps attract and retain creative individuals in the local workforce.

	Tactics	Timing	Staff/Board	Partners	Direct costs/resources	Outcome (metrics)
A2.C.4	<p>Revise www. ArtsAndScience.org to serve as the community's most comprehensive directory of all creative individuals (artists, historians, scientists, scholars).</p> <p>Use national best practices/policies to guide and inform ASC's Web site enhancements.</p>	2008-2013	<ul style="list-style-type: none"> • CCI • Marketing & Communications 		\$50,000 has been secured; if actual requirements exceed budget, the difference would need to be secured.	Number of visits on www. ArtsAndScience.org increase annually.
			<ul style="list-style-type: none"> • Marketing Committee 			
A2.C.5	<p>Recruit national arts, science and history conferences, symposia and events to Charlotte region (e.g., National Science Foundation, National Trust for Historic Preservation, Americans for the Arts, American Symphony Orchestra League, The Council of American Jewish Museums, Theatre Communications Group, Dance USA, Southern Arts Federation, American Craft Council, Chorus America, etc.).</p>	Every five years beginning 2010	<ul style="list-style-type: none"> • CCI • Marketing & Communications • Executive 	<ul style="list-style-type: none"> • Art, science and history providers • CRVA 	TBD; will vary significantly depending on the nature of the event.	Awareness of and exposure to America's top, most diverse and cutting-edge arts, science and history offerings are brought to Charlotte-Mecklenburg.
			<ul style="list-style-type: none"> • CCI Committee • Marketing Committee • Executive Committee 			

GOAL I. BUILD APPRECIATION

	Tactics	Timing	Staff/Board	Partners	Direct costs/resources	Outcome (metrics)
A2.C.6	Develop a plan and regularly communicate the financial impact (value) of the cultural community to Charlotte-Mecklenburg beyond ASC's annual Impact & Investment event (ASC's public announcement of investments).	2009	<ul style="list-style-type: none"> Marketing & Communications 	<ul style="list-style-type: none"> Public relations firm 	\$15,000 per year	Measure increased awareness of the benefits of the cultural community.

A2.D Strategy: Establish ASC Honors Program.

	Tactics	Timing	Staff/Board	Partners	Direct costs/resources	Outcome (metrics)
A2.D.1	Recognize lifetime achievement in the arts, sciences and history by Charlotte-Mecklenburg residents.	Triennially (2009, 2012)	<ul style="list-style-type: none"> CCI Marketing & Communications 	<ul style="list-style-type: none"> Colleges and universities 	\$50,000 per year	Increased recognition of exemplary achievements by local residents.
			<ul style="list-style-type: none"> CCI Committee Marketing Committee 			

TABLE A.1 INVESTMENT SCHEDULE

	For whom	FY2008	FY2009	FY2010	FY2011	FY2012	FY2013
Operating Support I	Current Annual Support Grants	Organizations with budgets \$50,000-\$299,000	New Review Process	Annual Review	→	→	→
Operating Support II		Organizations with budgets \$300,000 - \$999,999, 2-year investments	Transition Process	New Review Process		Review	Review
Operating Support III		Organizations with budgets over \$1 million, 3-year investments	Transition Process	Transition Process	New Review Process		Review
Advancement		Competitive annual or multi-year investment designed to build organization's capacity		New Review Process	Annual Review	→	→
Cultural Project Support	Arts, science and history organizations with budgets under \$50,000	Current Process	New Review Process	Annual Review	→	→	→
Access Support	Non-arts, science and history organizations using culture as a tool in achieving broader community goals; e.g., youth-at-risk, senior citizens, environment, etc.	Current Process	New Review Process	Annual Review	→	→	→
Regional Artist Project Grants		Current Process	→	→	→	→	→
McColl Award	Local artist/creative individual or cultural organization	Current Process			New Process Review		
ASC Honors	Local artist/creative individual for lifetime achievement		New Review Process			Review	
Creative Renewal Fellowships	Local artist/creative individual/cultural administrator			New Review Process			Review
Innovation/Venture Capital Fund	Eligibility and criteria to be developed			New Review Process	Annual Review	→	→

GOAL I. BUILD APPRECIATION

TABLE A.1 INVESTMENT SCHEDULE *continued*

	For whom	FY2008	FY2009	FY2010	FY2011	FY2012	FY2013
Stanford Financial Excellence in Culture Award	Operating Support recipients	Current Process	→	→	→	→	→
Cultural Education: CMS and independent schools, science and history education	Annual funding for CMS via ArtsTeach All other categories via competitive annual review process	Current Process	→	→	→	→	→
Theatre/Urban/Science	Producing theaters (depending on the programming), artists of color and any arts, science or history organization with a science or environmental education initiative	New Review Process	Annual Review	→	→	→	→
Public Art/Urban Design	City & County Annual CIP investments; towns and private developers via contracts	Current Process	→	→	→	→	→
Neighborhood artists and other creative individuals in residence	Artists/creative individuals and arts, science and history providers based on needs determined by host organization/center	Current Process	→	→	→	→	→
Arts In Healthcare	Hospitals and health care institutions	Current Process	→	→	→	→	→
Cultural Tourism	Arts, science and history organizations	Current Process	→	→	→	→	→

GOAL II. BUILD PARTICIPATION

P1 OBJECTIVE: GROW COMMUNITY PARTICIPATION IN CULTURAL EDUCATION & PROGRAMS.

P1.A Strategy: Strengthen community cultural education for all.

	Tactics	Timing	Staff/Board	Partners	Direct costs/resources	Outcome (metrics)
P1.A.1	<p>Assess ASC's investment in K-12 cultural education as recommended in the 1998-2003 <i>Cultural Action Plan</i>. Based on assessment, develop appropriate new strategies and investment priorities.</p> <ul style="list-style-type: none"> • Convene a task force representing arts education funders (CMS, County, ASC and others). 	<p>2009 assessment</p> <p>2010-2013 action plan</p>	<ul style="list-style-type: none"> • CCI • Executive 	<ul style="list-style-type: none"> • ArtsTeach • CMS • Independent schools • Arts, science and history providers 	<p>FY08 - \$1.2MM</p> <p>FY13 - \$1.5MM</p>	<p>Number of annual K-12 participants in cultural education events and programs reported by funded arts, science and history providers increase.</p> <p>Number of annual partnerships with K-12 education institutions reported by funded arts, science and history providers' increase.</p>
P1.A.2	<p>Nurture cultural education collaboration between neighborhood organizations and arts, science and history providers, creative individuals and others.</p>	2009-2013	<ul style="list-style-type: none"> • CCI • CCI Committee • ArtsTeach Board 	<ul style="list-style-type: none"> • United Way • Faith-based institutions • Arts, science and history providers 	See P1.A.1	<p>Number of annual partnerships with neighborhood organizations reported by funded arts, science and history providers' increase.</p> <p>Number of annual participants in neighborhood cultural education programs and targeted ZIP codes reported by funded arts, science and history providers increase.</p>

GOAL II. BUILD PARTICIPATION

	Tactics	Timing	Staff/Board	Partners	Direct costs/resources	Outcome (metrics)
P1.A.3	Engage in discussions to encourage colleges and universities to add MFA degree programs.	2010-2013	<ul style="list-style-type: none"> • CCI • Executive 	<ul style="list-style-type: none"> • All colleges and universities in the region 	Minimal	MFA programs established.
		<ul style="list-style-type: none"> • CCI Committee • ArtsTeach Board 				

P1.B Strategy: Increase attendance at arts, science and history providers' programs and events.

	Tactics	Timing	Staff/Board	Partners	Direct costs/resources	Outcome (metrics)
P1.B.1	Develop and implement a marketing plan to promote www.CharlotteCultureGuide.com including advertising, PR, key-word search strategy and keeping content current and relevant.	2009	<ul style="list-style-type: none"> • CCI • Marketing & Communications 	<ul style="list-style-type: none"> • CRVA • Art, science and history providers • Public relations firm 	<ul style="list-style-type: none"> • \$15,000 for agency costs • \$25,000 for acquisition expenses. 	Number of visits to www.CharlotteCultureGuide.com annually increase.
		<ul style="list-style-type: none"> • Marketing Committee 				

	Tactics	Timing	Staff/Board	Partners	Direct costs/resources	Outcome (metrics)
P1.B.2	<p>Develop and communicate programming offers through a comprehensive strategy that includes www.CharlotteCultureGuide.com, PR and advertising:</p> <ul style="list-style-type: none"> • Expose arts, science and history providers' events to increase participation. • Work with arts, science and history providers to develop cross-selling strategies. • Develop a newcomer strategy that includes database marketing (Welcomemat), partnerships (real estate agents), advertising and PR. 	2010-2013	<ul style="list-style-type: none"> • Marketing & Communications • Marketing Committee 	<ul style="list-style-type: none"> • Arts, science and history providers 	See P1.B.1	Number of annual participants in arts, science and history offerings increase.
P1.B.3	<p>Aid in promotion of arts, science and history summer camps offered by cultural partners and neighborhood organizations.</p>	2010-2013	<ul style="list-style-type: none"> • Marketing & Communications 	<ul style="list-style-type: none"> • Arts, science and history providers 	No incremental costs	Number of offerings and attendance increase.
P1.B.4	<p>Assess the relevance and use of the “Connect With Culture” card. Then, develop a strategy to make the Connect with Culture card a “must carry” resource for cultural participants.</p>	2010-2013	<ul style="list-style-type: none"> • Marketing & Communications • Finance (IT) • Marketing Committee 	<ul style="list-style-type: none"> • Third-party consultants 	\$50,000 has been reserved for research and re-development of the card; technological possibilities may cost more than what is reserved but cannot be determined until research is completed.	<p>Number of annual participants in arts, science and history programs increase.</p> <p>Donor survey results indicate that donors are utilizing and valuing the Connect with Culture card.</p>

GOAL II. BUILD PARTICIPATION

P1.C Strategy: Encourage donors to increase their participation in and patronage of the community's cultural offerings.						
	Tactics	Timing	Staff/Board	Partners	Direct costs/resources	Outcome (metrics)
P1.C.1	<p>Convert donors to patrons of cultural programs and services through:</p> <ul style="list-style-type: none"> • Targeted direct mail communications • Annual Fund Drive materials • Connect with Culture card (To be completed in 2010) 	2009	<ul style="list-style-type: none"> • Marketing & Communications • Development 		Incremental costs of \$16,000 for direct mail efforts (annual recurring cost).	Number of donors converted to "consumers" (participants, buyers of art, etc.) increases annually.
P1.D Strategy: Provide skills development and shared services to help arts, science and history providers build audiences.						
	Tactics	Timing	Staff/Board	Partners	Direct costs/resources	Outcome (metrics)
P1.D.1	<p>Provide comprehensive audience development training to arts, science and history providers as part of skill and professional development initiatives. (See S1.A)</p>	2008-2013	<ul style="list-style-type: none"> • CCI • Organizational Advancement Committee 	<ul style="list-style-type: none"> • National Arts Marketing Project • Colleges and universities 	FY08 - \$20,000 FY13 - \$50,000	Funded arts, science and history providers report annual increases in program participants.
P1.D.2	<p>Provide cultural tourism development training to arts, science and history providers.</p>	2008-2013	<ul style="list-style-type: none"> • CCI 	<ul style="list-style-type: none"> • CRVA 	FY08 - \$20,000 FY13 - \$50,000	Funded arts, science and history providers report annual increases in tourist participation in their offerings.

P1.E Strategy: Create a volunteer program to increase community involvement in ASC activities.

	Tactics	Timing	Staff/Board	Partners	Direct costs/resources	Outcome (metrics)
P1.E.1	<p>Design, develop, implement and regularly evaluate ASC's volunteer program.</p> <ul style="list-style-type: none"> Program to include needs assessment, recruitment, training, matching and recognition. 	2008	<ul style="list-style-type: none"> Development with representatives from every department 	<ul style="list-style-type: none"> Benchmark best practices from other area non-profits 	Less than \$5,000	ASC is a respected model organization for volunteer recruitment, retention and recognition.
P1.E.1.a	<p>Deploy and engage volunteers.</p>	2009-2013	<ul style="list-style-type: none"> Development with representatives from every department 		Part-time staff position possible at a recurring annual cost of \$20,000.	Participation in ASC's volunteer opportunities achieves annual growth goals.

P2. OBJECTIVE: INCREASE INNOVATIVE, EMERGING CREATIVE ACTIVITY THAT ENGAGES AUDIENCES.**P2.A Strategy: Invest in creative innovation.**

	Tactics	Timing	Staff/Board	Partners	Direct costs/resources	Outcome (metrics)
P2.A.1	<p>Increase annual investments in creative individuals.</p> <ul style="list-style-type: none"> Regional Artist Project Grants Creative Renewal Fellowships 	2010-2013	<ul style="list-style-type: none"> Executive CCI 	<ul style="list-style-type: none"> Regional arts councils N.C. Arts Council Colleges and universities 	<p>RAPG: FY08 - \$70,000 FY13 - \$150,000</p> <p>Creative Renewal: FY08 - \$0 FY10 - \$100,000 FY13 - \$250,000</p>	More creative individuals receive career advancement support.

GOAL II. BUILD PARTICIPATION

	Tactics	Timing	Staff/Board	Partners	Direct costs/resources	Outcome (metrics)
P2. A.2	Provide investment for innovative, emerging creative activity. Seek input and counsel from community's most innovative cultural professionals.	2011-2013	• CCI	• Arts, science and history providers	See A1.A.1	Art, science and history assessment surveys tell us that innovation investment is valuable.
• Organizational Advancement Committee						

P2.B Strategy: Cultivate expert resources to guide audience outreach.

	Tactics	Timing	Staff/Board	Partners	Direct costs/resources	Outcome (metrics)
P2.B.1	Build on efforts of the Latino Initiative and Theatre task forces to guide cultural development strategies. Create additional task forces as needed for concepts such as: • Charlotte's international corridors • At-risk neighborhoods • Emerging ethnic populations	2009-2013	• CCI	• Existing networks and task forces	See A1.A.1	Number of arts, science and history providers annually involved in and assisted through task force networks increase.
• Organizational Advancement Committee						

P3 OBJECTIVE: EXPAND CULTURAL ACTIVITY THAT IS ACCESSIBLE TO AND REFLECTIVE OF OUR CHANGING COMMUNITY.

P3.A Strategy: Heighten awareness of culturally diverse programs and opportunities.

	Tactics	Timing	Staff/Board	Partners	Direct costs/resources	Outcome (metrics)
P3.A.1	Make culturally diverse programs easily identifiable on www.CharlotteCultureGuide.com.	2009-2013	• Marketing & Communications • CCI	• Arts, science and history providers	Minimal	Increased awareness of culturally diverse offerings throughout the community.
• Marketing Committee						

	Tactics	Timing	Staff/Board	Partners	Direct costs/resources	Outcome (metrics)
P3.A.2	Encourage and sponsor artist/creative individual residencies with arts, science and history providers to engage neighborhoods and underserved areas.	2010-2013	<ul style="list-style-type: none"> • CCI • CCI Committee 	<ul style="list-style-type: none"> • YMCA • YWCA • JCC • United Way of Central Carolinas' Mecklenburg Agencies • Cultural Partners 	See P3.C.1	<p>Increased access to cultural programming in at-risk neighborhoods and for underserved populations.</p> <p>Increased outreach by cultural providers.</p>

P3.B Strategy: Ensure that ASC and all arts, science and history providers are informed about current demographic growth, challenges and opportunities.

	Tactics	Timing	Staff/Board	Partners	Direct costs/resources	Outcome (metrics)
P3.B.1	Continually track diversity trends, challenges and opportunities locally, regionally and nationally.	2009 - 2013	<ul style="list-style-type: none"> • CCI • Executive • Marketing & Communications 	<ul style="list-style-type: none"> • Community Building Initiative (CBI) • Crossroads Charlotte 	Minimal	ASC's diversity research is current.
P3.B.2	<p>Share demographic information (trends, research, etc.) with the sector.</p> <ul style="list-style-type: none"> • Provide via ASC's Web site. • Include demographic information, strategies and best practices in Cultural College curriculum. (See S1.A) 	2009 - 2013	<ul style="list-style-type: none"> • CCI • Marketing & Communications 		None	<p>Number of visits to ASC's Web site for demographic information annually increases.</p> <p>Art, science and history assessment surveys indicate the information is valuable.</p>

GOAL II. BUILD PARTICIPATION

	Tactics	Timing	Staff/Board	Partners	Direct costs/resources	Outcome (metrics)
P3.B.3	<p>Keep ASC's diversity policies current. From the N.C. Arts Council, other Charlotte-Mecklenburg sectors and arts, science and history providers seek and disseminate diversity policies and practices used to achieve successful outreach.</p>	2009-2013	<ul style="list-style-type: none"> • Executive • Executive Committee 	<ul style="list-style-type: none"> • CBI 	None	ASC staff, board and volunteer composition, and its policies and practices model the diversity standards it promotes.
P3.B.4	<p>In existing and future programs such as the Cultural Leadership Training Program, encourage and assist arts, science and history providers in diversifying staff, boards of directors and volunteer pools. (Diversity includes age, gender, geography and ethnicity.)</p>	2010-2013	<ul style="list-style-type: none"> • CCI • CCI Committee 	<ul style="list-style-type: none"> • Leadership Charlotte • CBI • Foundation For The Carolinas Impact Fund • United Way 	No incremental cost	Arts, science and history providers' staff, board and volunteer composition, and policies/practices are aligned with Charlotte-Mecklenburg's diversity standards.

P3.C Strategy: Implement cultural activities in Charlotte-Mecklenburg's fragile neighborhoods.

	Tactics	Timing	Staff/Board	Partners	Direct costs/resources	Outcome (metrics)
P3.C.1	<p>Initiate projects that involve residents in planning and implementation in ways that build participation and inspire community pride.</p> <p>Encourage and support:</p> <ul style="list-style-type: none"> • Collaborative projects involving arts, science and history providers and community-based organizations • Public art projects • Residencies 	2009-2013	<ul style="list-style-type: none"> • CCI • Public Art Commission 	<ul style="list-style-type: none"> • City/County Planning 	FY08 - \$15,000 FY13 - \$150,000	<p>Increased citizen involvement in cultural activities throughout neighborhoods.</p> <p>Arts, science and history initiatives are viewed as a resource to address community issues.</p> <p>Public art pieces are "cared-for-sources-of-pride" in their communities.</p>

P3.D Strategy: Increase collaborative programming throughout Charlotte-Mecklenburg to increase accessibility of programming.

	Tactics	Timing	Staff/Board	Partners	Direct costs/resources	Outcome (metrics)
P3.D.1	<p>Build relationships with other community organizations to collaborate with funded arts, science and history providers to reach new audiences in north, south and central Mecklenburg County.</p>	2009-2013	<ul style="list-style-type: none"> • CCI • Organizational Advancement Committee • CCI-North and South Advisory Boards 	<ul style="list-style-type: none"> • YMCA • YWCA • JCC • Parks & Recreation departments • Neighborhood groups 	See A1.A.1	Number of participants in cultural programs increases.

GOAL II. BUILD PARTICIPATION

P3.E Strategy: Advocate for continued implementation of the Cultural Facilities Master Plan's Auxiliary Facility and Community Cultural Centers to increase the ease and accessibility of offerings to the public.						
	Tactics	Timing	Staff/Board	Partners	Direct costs/resources	Outcome (metrics))
P3.E.1	Work with all economic development representatives to identify possible locations throughout the city and outlying communities for cultural outlets.	2009-2013	<ul style="list-style-type: none"> • Executive 	<ul style="list-style-type: none"> • Town, City and County representatives 	\$10,000 annually	The locations where the public participates and consumes art, science and history become more geographically dispersed with plans in place for community cultural center sites by 2013.
P3.E.2	Pursue recommendations in the Cultural Facilities Master Plan as resources are made available.	2009-2013	<ul style="list-style-type: none"> • Executive • Finance • Development 	<ul style="list-style-type: none"> • Town, City and County representatives 	TBD	<i>Cultural Facilities Master Plan</i> outcomes are achieved.

GOAL III. BUILD SUPPORT

S1. OBJECTIVE: FOSTER HEALTHY CULTURAL INSTITUTIONS THAT HAVE THE CAPACITY TO OPERATE AND SUSTAIN THEMSELVES.

S1.A Strategy: Advance the excellence, skill and capacity of all arts, science, and history providers, including creative individuals.

	Tactics	Timing	Staff/Board	Partners	Direct costs/resources	Outcome (metrics)
S1.A.1	<p>Strengthen and expand ASC's current professional and skills development programs and workshops. (Include best practices, tools, policies and procedures focusing on program excellence, participation and sustainability aligned with ASC's investment criteria).</p> <ul style="list-style-type: none"> • For cultural provider staff, boards and volunteers • For creative individuals 	2008-2013	<ul style="list-style-type: none"> • CCI • Marketing & Communications • Development • Finance 	<ul style="list-style-type: none"> • College & Universities • National arts strategies • Stanford Executive Education, etc. • N.C. Center for Non-profits • Benevon 	<p>Organizations staff/volunteers: FY08 - \$12,500 FY13 - \$125,000</p> <p>Technical Asst. & Scholarships: FY08 - \$32,000 FY13 - \$125,000</p> <p>Creative Individuals: FY08 - \$30,000 FY13 - \$100,000</p> <p>Research and Planning: FY08 - \$43,000 FY13 - \$50,000</p>	ASC, arts, science and history providers and creative individuals are empowered to identify areas for improvement.
S1.A.2	<p>Provide professional and skill development offerings and best practices on the ASC Web site for:</p> <ul style="list-style-type: none"> • Arts, science, and history providers • Creative individuals 	2010-2013	<ul style="list-style-type: none"> • CCI • Marketing & Communications 		<p>FY08 - \$0 FY13 - \$50,000</p>	<p>ASC, arts, science and history providers and creative individuals are empowered to identify areas for improvement.</p> <p>Assessment surveys indicates that the information is valuable.</p>

GOAL III. BUILD SUPPORT

	Tactics	Timing	Staff/Board	Partners	Direct costs/resources	Outcome (metrics)
S1.A.3	<p>Provide executive coaching and mentoring to arts, science and history providers as well as creative individuals.</p> <ul style="list-style-type: none"> • Identify leaders in areas and facilitate relationships. • Establish mentorship programs for emerging cultural leaders. 	2008-2013	<ul style="list-style-type: none"> • CCI • Organizational Advancement Committee 		See S1.A.1	Cultural provider evaluations indicates that coaching and mentoring are valuable.
S1.A.4	<p>Support stipends for creative individuals and funded partner staff and boards to explore and learn about newest trends.</p>	2012	<ul style="list-style-type: none"> • CCI • Development • Organizational Advancement Committee 		See S1.A.1	Creative individuals and funded partner surveys indicates that stipends are valuable.
S1.A.5	<p>Maximize ASC's convener role to provide networks and professional exchange for all arts, science and history providers.</p>	2008-2013	<ul style="list-style-type: none"> • CCI • Organizational Advancement Committee 		See S1.A.1	Cultural provider evaluations indicates that networks are valuable.

S1.B Strategy: Assess Charlotte-Mecklenburg's cultural industry against community needs, issues and national best practices.

	Tactics	Timing	Staff/Board	Partners	Direct costs/resources	Outcome (metrics)
S1.B.1	<p>Design, develop, implement and regularly evaluate a sector-wide assessment system.</p> <ul style="list-style-type: none"> • Develop criteria to measure core competencies of providers. • Align with national industry standards for science, history and all artistic disciplines. • Focus on program excellence, participation and sustainability and other ASC investment criteria. 	2011-2013	<ul style="list-style-type: none"> • CCI • Organizational Advancement Committee 	<ul style="list-style-type: none"> • N.C. Center for Non-profits • National arts strategies • National service organizations • Arts, science and history providers 	Annual research and consultation would average \$20,000 per year.	Increased benchmarking and information sharing across the non-profit sector.

S1.C Strategy: Create a program to combine purchasing power for the cultural community.

	Tactics	Timing	Staff/Board	Partners	Direct costs/resources	Outcome (metrics)
S1.C.1	<p>Increase collective buying power of the cultural community including:</p> <ul style="list-style-type: none"> • Office supplies • Insurance • Banking services/credit cards • Promotional activities (advertising) • Artist raw materials 	<p>Research 1 or 2 possibilities by 6/30/08</p> <p>Implement 2009</p>	<ul style="list-style-type: none"> • Finance • CCI 	<ul style="list-style-type: none"> • Ad Hoc sub-committee of the Finance Committee • Suppliers • Arts, science and history providers 	Requests for proposal (RFPs) to be created.	<p>Cost are reduced across the cultural community.</p> <p>Arts, science and history provider surveys tell us shared buying power is valuable.</p>

GOAL III. BUILD SUPPORT

	Tactics	Timing	Staff/Board	Partners	Direct costs/resources	Outcome (metrics)
S1.C.2	<p>Investigate and implement shared platforms and expertise to leverage financial and human capital in the areas of:</p> <ul style="list-style-type: none"> • Technology • HR • Finance and accounting • Marketing 	<p>Research possibilities by 12/31/08 for 2009</p> <p>Implement 2010</p>	<ul style="list-style-type: none"> • Finance • CCI 	<ul style="list-style-type: none"> • NPower • ADP Totalsource • Blackwood Finance, etc. • Arts, science and history providers 	TBD through research. Grant funding may be available.	<p>Increased efficiency within cultural sector operations.</p> <p>Arts, science and history provider surveys tell us shared services are valuable.</p>

S2 OBJECTIVE: FOSTER AN ENVIRONMENT TO ATTRACT AND GROW THE NUMBER OF CREATIVE INDIVIDUALS WHO LIVE AND WORK IN OUR COMMUNITY.

S2.A Strategy: Communicate the contributions of creative individuals in the cultural community.

	Tactics	Timing	Staff/Board	Partners	Direct costs/resources	Outcome (metrics)
S2.A.1	<p>Promote individual artists, scientists, humanists, historians and creative individuals in all appropriate communications.</p>	2008-2013	<ul style="list-style-type: none"> • Marketing & Communications 	<ul style="list-style-type: none"> • PR firm 	Incorporated into engagement of a PR firm (See F2.B.4).	Urban Institute questions indicate growing public awareness and pride in creative individuals.

S2.B Strategy: Partner with others in the community to provide leadership for advocacy of affordable live, work, exhibition and performance spaces.

	Tactics	Timing	Staff/Board	Partners	Direct costs/resources	Outcome (metrics)
S2.B.1	<p>Collaborate with other arts, science and history providers on an advocacy strategy for affordable housing.</p>	2009-2013	<ul style="list-style-type: none"> • Executive • CCI 	<ul style="list-style-type: none"> • Arts, science and history providers • Charlotte Housing Authority 	Minimal	ASC is included in discussions, community forums and media articles as an advocate for affordable housing.

	Tactics	Timing	Staff/Board	Partners	Direct costs/resources	Outcome (metrics)
S2.B.2	Work towards development of cultural incubators and alternative spaces that provide office, meeting, venue, performance and exhibition space where scholars, historians, scientists and artists of every discipline can create, share and sell their work.	2009-2013	<ul style="list-style-type: none"> • Executive • CCI 	<ul style="list-style-type: none"> • Arts, science and history providers • Private developers • City and County Economic Development teams • Charlotte Chamber of Commerce 	None	<p>Charlotte-Mecklenburg's reputation in the South as an "arts-friendly" city continues to attract creative individuals.</p> <p>Dunn & Bradstreet annual creative individual survey results increase.</p>

S3 OBJECTIVE: STRENGTHEN EXISTING RESOURCES AND CULTIVATE NEW ONES TO SUPPORT INCREASED CULTURAL ACTIVITY.

S3.A Strategy: Grow the Annual Fund Drive.

	Tactics	Timing	Staff/Board	Partners	Direct costs/resources	Outcome (metrics)
S3.A.1	Create a specific plan for major corporate participants in the Annual Fund Drive with a multi-year focus.	2009-2013	<ul style="list-style-type: none"> • Development 	<ul style="list-style-type: none"> • Corporate donors 	None	Annual Fund Drive reaches annual goals.
S3.A.2	Strengthen retention rates of current workplace and non-workplace individual donors.	2010	<ul style="list-style-type: none"> • Development 	<ul style="list-style-type: none"> • Individual donors 	None	Retention rates increase annually.

GOAL III. BUILD SUPPORT

	Tactics	Timing	Staff/Board	Partners	Direct costs/resources	Outcome (metrics)
S3.A.3	Strengthen on-going relationships with existing in-house coordinators, and build new relationships.	2009-2013	• Development	• In-house coordinators	None	Recurring relationships increase annually.
S3.A.4	Leverage and deploy ASC volunteers as contacts in their respective workplaces for the Annual Fund Drive.	2010	• Development	• ASC volunteers	None	ASC volunteers' spheres of influence are maximized.
S3.A.5	Build relationships with corporate human resources directors and departments to strengthen opportunities for the Annual Fund Drive.	2010	• Development	• Corporate donors	TBD	Annual Fund Drive reaches annual goals.

S3.B Strategy: Increase donor satisfaction.

	Tactics	Timing	Staff/Board	Partners	Direct costs/resources	Outcome (metrics)
S3.B.1	Define “Ideal Donor Experience” in partnership with various donors (corporate, individual, workplace campaigns, etc.) and implement actions to ensure that donor satisfaction increases.	2009	• Development • Marketing & Communications • Finance • Executive	• UNC Charlotte Urban Institute (survey instruments)	Minimal	Donor satisfaction, as measured through annual survey results, increases annually.

S3.C Strategy: Secure funding sources for program and project activities.

	Tactics	Timing	Staff/Board	Partners	Direct costs/resources	Outcome (metrics)
S3.C.1	<p>Initiate a plan to increase underwriting and sponsorship of programs and projects.</p> <ul style="list-style-type: none"> • Create an inventory of likely funding opportunities (e.g., portfolio of “products” and their ideal delivery, scholarships, grants, etc.). • Share information with corporate sponsors and foundations. 	2009-2013	• Development		Research cost of \$5,000 - \$10,000 annually.	Number of programs and projects with sponsorships or underwriting increase annually by at least \$25,000.
S3.C.2	<p>Develop a major gifts strategy.</p> <ul style="list-style-type: none"> • Investigate best practices from similar programs such as Faculty Partners Fund at UNC Chapel Hill. • Create a work plan for a Major Gifts Officer. 	2009	• Development	• Greater Charlotte Cultural Trust	None for work plan; execution of work plan may require additional staff in 2010.	Annual major gifts goal achieved.
S3.C.3	<p>Create and implement processes to:</p> <ul style="list-style-type: none"> • Identify donors who would be viable Major Gift prospects. • Align interests of Major Gift prospects in supporting creative individuals, special programs, program excellence, etc. 	2009 - 2013	• Development		Engage third-party research in 2010, which may require funding of \$10,000.	Annual major gifts goal achieved.

GOAL III. BUILD SUPPORT

	Tactics	Timing	Staff/Board	Partners	Direct costs/resources	Outcome (metrics)
S3.C.4	Initiate a “connecting” program that bridges interested donors and artists through “meet the artist” events and other activities that place emphasis on experience.	2010-2013	• Development		Material costs of \$1,500 and event costs of \$5,000 annually.	The value of donor investment is substantiated. Donor retention rates are strong. Repeat-donor levels continually increase.

S3.D Strategy: Pursue opportunities to expand resources by means outside the Annual Fund Drive, both long- and short-term.

	Tactics	Timing	Staff/Board	Partners	Direct costs/resources	Outcome (metrics)
S3.D.1	Explore and implement opportunities to incorporate online giving options throughout entire year.	2009-2013	• Development • Marketing & Communications	• NPower • Web designer	Costs included in marketing costs to redesign ASC Web site.	The annual planned giving goal is achieved.
S3.D.2	Develop a plan to increase engagement with highest potential foundation giving opportunities. Specific focus on skill and professional development and program excellence.	2010-2013	• Development • CCI	• Local and national foundations	None	Foundation grant requests applied for, and received, increase.
S3.D.3	Explore options for ASC’s revenue diversification through new business income strategies , including banner ads, fee for service, etc.	2008-2013 on-going Research one idea every 6 months	• Finance • Marketing & Communications • Resource Development Committee	• Auditors • Legal consultants	TBD through research; any costs incurred would need to be offset by new revenues generated (return on investment of 3 years or better).	By 2014, generate new revenue through Unrelated Business Income to offset up to 2% of General & Administrative expenses.

	Tactics	Timing	Staff/Board	Partners	Direct costs/resources	Outcome (metrics)
S3.D.4	Explore potential sponsorships, match with opportunities and determine set of factors that make for a successful sponsorship (e.g., visibility).	2009-2013	<ul style="list-style-type: none"> • Development • Marketing & Communications 	<ul style="list-style-type: none"> • Corporate community and foundations 	None	Annual sponsorship goals are achieved (\$100,000 in 2009; increasing by \$25,000 annually).
S3.D.5	Increase opportunities for planned giving by partnering with GCCT.	2009-2013	<ul style="list-style-type: none"> • Development • Marketing & Communications 	<ul style="list-style-type: none"> • GCCT 	TBD	Annual planned giving goals achieved.
S3.D.6	Design and implement a strategy to promote and grow ASC's endowment.	2010-2013	<ul style="list-style-type: none"> • Development <hr/> <ul style="list-style-type: none"> • Endowment Committee 	<ul style="list-style-type: none"> • GCCT 	TBD after strategy is defined	Annual endowment goals are established and achieved.

S3.E Strategy: Cultivate companies and individuals who have not yet participated in the Annual Fund Drive.

	Tactics	Timing	Staff/Board	Partners	Direct costs/resources	Outcome (metrics)
S3.E.1	Survey/research companies and individuals outside the workplace campaign , focusing especially on those which have not given and those which are newcomers.	2009-2013	<ul style="list-style-type: none"> • Development 	<ul style="list-style-type: none"> • Third-party research company • UNC Charlotte Urban Institute 	Survey costs of \$10,000	Number of companies and individual givers to the Annual Fund meets annual goals.
S3.E.2	Define and implement a sales process for securing new companies' participation in the Annual Fund Drive.	2009-2013	<ul style="list-style-type: none"> • Development 		Minimal	Number of new company prospects successfully cultivated meets annual goals.

GOAL III. BUILD SUPPORT

	Tactics	Timing	Staff/Board	Partners	Direct costs/resources	Outcome (metrics)
S3.E.3	Create a set of activities around contacting companies and individuals new to Charlotte-Mecklenburg and connect with ASC volunteers.	2010-2013	• Development		Cultivation costs of \$10,000 annually.	Number of new company and individual prospects successfully cultivated meets annual goals.

S3.F Strategy: Increase public sector investment in the cultural sector.

	Tactics	Timing	Staff/Board	Partners	Direct costs/resources	Outcome (metrics)
S3.F.1	Create a strategy to optimize public/private partnership with local government. • Better align ASC requests with public sector priorities. • Ask for CPI (inflation increases) from City. • Partner with City/County to increase cultural sector funding.	2008-2013	• Executive • CCI	• Towns • County • City	None	More public dollars are available for arts, science and history programming and offerings.
S3.F.2	Assemble set of grant opportunities and write proposals for grant funding from local, state and federal agencies.	2008-2013	• Development • CCI	• N.C. Arts Council • National Endowment for the Arts • Etc.	None	More public dollars are allocated for arts, science and history programming and offerings.

GOAL IV. UPDATE AND ENHANCE ASC'S OPERATIONS

F1 OBJECTIVE: BE A STRONG LEADER AND ADVOCATE, AN EFFECTIVE STRATEGIST FOR THE CULTURAL SECTOR.

F1.A Strategy: Continue ASC's prominent leadership and advocacy roles in the cultural sector and in important community arenas.

	Tactics	Timing	Staff/Board	Partners	Direct costs/resources	Outcome (metrics)
F1.A.1	<p>Promote the cultural sector through leadership and advocacy.</p> <ul style="list-style-type: none"> • Community planning and development • Economic development • Neighborhood revitalization • Education reform • Public policy - legislation • Greening and environmental responsibility • Public art 	2008-2013	<ul style="list-style-type: none"> • Executive • Leadership Team <hr/> <ul style="list-style-type: none"> • ASC Board • Public Art Commission 	<ul style="list-style-type: none"> • Local governments • CMS • Charlotte Chamber of Commerce • CRVA 	None	<p>ASC has a highly successful track record at leveraging resources and favorably negotiating policies that benefit the cultural sector and help to achieve plan goals.</p> <p>CMS adopts recommendations of the 2002-2007 <i>Public Art Master Plan</i>.</p>
F1.A.2	<p>Assess the need for engaging local leaders to advance Charlotte-Mecklenburg's vibrancy and quality of life. (Consider establishing a "Quality of Life Roundtable.")</p> <ul style="list-style-type: none"> • Discuss collective and collaborative opportunities that strengthen and advance. • Discuss the ideal depth and breadth of arts, science and history offerings for our community and how to attain and sustain them. 	2009-2013	<ul style="list-style-type: none"> • CCI • Executive 	<p>Leaders of:</p> <ul style="list-style-type: none"> - Business and industry - Colleges and universities - Public and private schools - Human and social services - Tourism - Economic development 	TBD	<p>More robust, accessible cultural sector portfolio of arts, science and history offerings.</p> <p>State and national resources are identified and successfully leveraged.</p>

GOAL IV. UPDATE AND ENHANCE ASC'S OPERATIONS

	Tactics	Timing	Staff/Board	Partners	Direct costs/resources	Outcome (metrics)
F1.A.3	Develop a comprehensive advocacy strategy for local, state and federal representatives - both elected and staff.	2009-2013	<ul style="list-style-type: none"> • CCI • Executive 	<ul style="list-style-type: none"> • North Carolina's local arts agency partners • Arts N.C. • Americans for the Arts • N.C. Center for Non-profits 	TBD	State and national resources are identified and successfully leveraged.

F2 OBJECTIVE: ENHANCE AND FOCUS ASC'S EFFICIENCY AND EFFECTIVENESS IN ITS OPERATIONS AND SYSTEMS.

F2.A Strategy: Align and scale ASC human resources with strategic plan goals and activities.

	Tactics	Timing	Staff/Board	Partners	Direct costs/resources	Outcome (metrics)
F2.A.1	Migrate organizational resources to meet the needs of ASC strategic plan.	2009	<ul style="list-style-type: none"> • CEO 			Resources align with strategic objectives of the organization.
F2.A.2	Develop a professional development plan for ASC staff. <ul style="list-style-type: none"> • Intentionally develop ASC staff for future employment throughout the cultural sector. 	Planning 2008 Implement 2009-2010	<ul style="list-style-type: none"> • CFO 	<ul style="list-style-type: none"> • ADP TotalSource • Executive directors and human resource managers within arts, science and history providers 	Professional development budget to increase from \$22,000 to \$35,000.	Improved staff skills, leadership and morale. Expanded career paths.

F2.B Strategy: Improve ASC's office environment to foster creativity, teamwork and innovation as an example to other businesses.						
	Tactics	Timing	Staff/Board	Partners	Direct costs/resources	Outcome (metrics)
F2.B.1	Identify office space to support ASC operations for the next 10-15 years.	May 2008	<ul style="list-style-type: none"> • CFO • CEO 	<ul style="list-style-type: none"> • Staubach 	Increased annual rent of \$80,000 to \$120,000 beginning in 2010.	Location that is convenient and centrally located for visibility of ASC.
F2.B.2	Design and occupy office space that is open and fosters teamwork, innovation, collaboration and flexibility. Work to develop space that is "green."	May 2009	<ul style="list-style-type: none"> • CFO 	<ul style="list-style-type: none"> • TBD 	Architectural and upfit costs to be incurred in 2009 - funds have been reserved to cover the cost of upfit.	Productivity and staff morale increase.
F2.C Strategy: Encourage efficiency and effectiveness in ASC operations.						
	Tactics	Timing	Staff/Board	Partners	Direct costs/resources	Outcome (metrics)
F2.C.1	Develop a five-year technology plan that includes the following components: <ul style="list-style-type: none"> • Evaluation of current state of infrastructure that incorporates risk-assessment project findings. • Design and acquisition of an ASC contact management and constituent database. • Design of a disaster recovery and business continuity plan. • Development of a data and application security manual. 	Plan design by 6/30/08 for the fiscal years 2009-2013	<ul style="list-style-type: none"> • Finance • Leadership Team • Finance Committee • Audit Committee 	<ul style="list-style-type: none"> • NPower for technology plan and vendor selection 	\$15,000 for technology plan and additional capital needs based on plan results; current annual capital technology costs average \$50,000 per year (anticipate that this average funding level is adequate).	ASC has superior ability to forecast technology needs and costs to increase organizational efficiency and effectiveness.

GOAL IV. UPDATE AND ENHANCE ASC'S OPERATIONS

	Tactics	Timing	Staff/Board	Partners	Direct costs/resources	Outcome (metrics)
F2.C.2	<p>Develop and implement a multi-year research schedule that will support this plan successfully.</p> <p>Include research needs of the cultural sector for a comprehensive patron/donor data repository.</p>	2008-2013	<ul style="list-style-type: none"> • Marketing & Communications • CCI 			ASC's research capacity supports planned growth.
			<ul style="list-style-type: none"> • Marketing Committee 			
F2.C.3	<p>Create and implement ASC's marketing and communication plan.</p>	2009-2013	<ul style="list-style-type: none"> • Marketing & Communications 	<ul style="list-style-type: none"> • PR firm 	Annual investment in FY 2009 of \$45,000 growing as needed to \$90,000 by FY 2013.	ASC's marketing capacity supports planned growth.
			<ul style="list-style-type: none"> • Marketing Committee 			
F2.C.4	<p>Increase excellence by learning from other international and national sources and markets.</p> <ul style="list-style-type: none"> • Benchmark key metrics around programming, participation and support. • Collect data and share with appropriate arts, science and history providers and community leaders. 	2009-2013	<ul style="list-style-type: none"> • Finance • CCI 	<ul style="list-style-type: none"> • 6-8 peer cities and their arts, science and history providers 	Minimal	<p>ASC is a "learning organization" and leads by example.</p> <p>Cultural provider evaluation substantiates the value of ASC information services.</p>

F3 OBJECTIVE: REFINE ASC GOVERNANCE AND STRENGTHEN THE CAPACITY OF THE BOARD TO LEAD THIS PLAN.

F3.A Strategy: Amend and restate ASC governing documents as appropriate to reflect best practices.

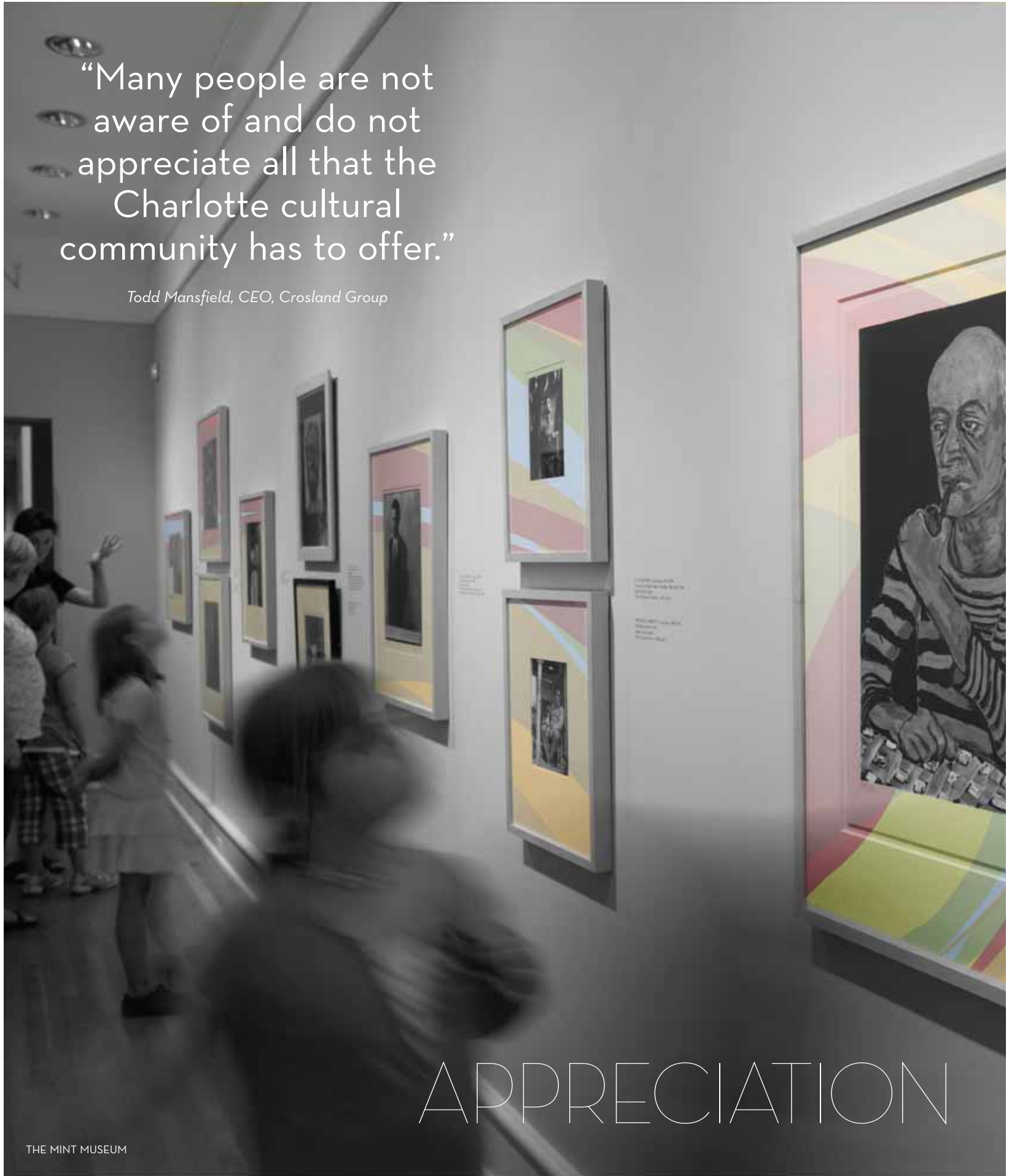
	Tactics	Timing	Staff/Board	Partners	Direct costs/resources	Outcome (metrics)
F3.A.1	Amend and restate the Articles of Incorporation, Bylaws and Board Policies.	Before 6/30/08	<ul style="list-style-type: none"> • CEO • Leadership Team 	<ul style="list-style-type: none"> • Parker, Poe, Adams & Bernstein LLP 	None	Updated and current governing documents in place for future utilization.
			<ul style="list-style-type: none"> • Executive Committee 			

F3.B Strategy: Strengthen ASC Board Committee structure to ensure efficiency and best practices.

	Tactics	Timing	Staff/Board	Partners	Direct costs/resources	Outcome (metrics)
F3.B.1	Develop a charter for the Nominating Committee to expand its responsibilities to include organizational governance.	Before 6/30/08	<ul style="list-style-type: none"> • CEO 	<ul style="list-style-type: none"> • Parker, Poe, Adams & Bernstein LLP 	None	Clarity of Board Committee responsibilities for overall governance oversight.
			<ul style="list-style-type: none"> • Nominating Committee 			
F3.B.2	Review and refine all Board Committee charters. <ul style="list-style-type: none"> • Charter a separate Audit Committee from Finance Committee. • Charter a new Resource Development Committee. 	Before 12/31/08	<ul style="list-style-type: none"> • CFO 	<ul style="list-style-type: none"> • Parker, Poe, Adams & Bernstein LLP 	None	Clarity of committee responsibilities. Compliance with industry best practice recommendations for a separate Audit Committee.
			<ul style="list-style-type: none"> • Nominating Committee • Finance Committee • Audit Committee • Resource Development Committee 			

“Many people are not aware of and do not appreciate all that the Charlotte cultural community has to offer.”

Todd Mansfield, CEO, Crosland Group



APPRECIATION

“I value a vibrant cultural life for our community because it brings people from all races and ethnicities together.”

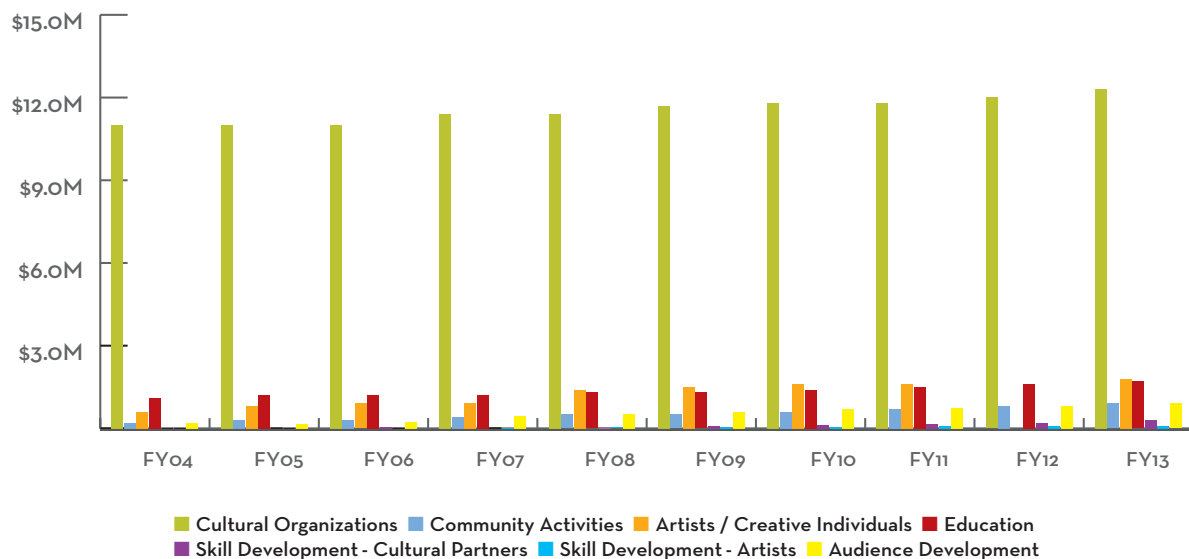
Harry Jones, Mecklenburg County Manager

implementation

A. FINANCIAL INVESTMENT FORECAST

Implementation of the strategies and tactics outlined in Section IV have been reviewed and the financial impacts forecasted. ASC anticipates growth in investments in individual artists, community organizations, skill and professional development offerings and advancement funding to arts, science, history and heritage providers. The following table and chart illustrate the five-year financial investment forecast. This information does not represent an annual budget and is expected to change annually due to revenue sources and community priorities.

asc investment forecast • Fy04-Fy13



asc's five year financial forecast

	Forecast FY2008	Forecast FY2009	Forecast FY2010	Forecast FY2011	Forecast FY2012	Forecast FY2013	Percentage of Total Investments 2013	\$ Growth in Investments 2008-2013
DIRECT PROGRAM INVESTMENTS								
CULTURAL PARTNERS								
Basic Operating Grants	10,995,000							(10,995,000)
Challenge/Strategic/Stabilization Grants	236,600	100,000						(236,600)
Category I Investments		200,000	200,000	200,000	200,000	200,000	1.1%	200,000
Category II Investments		940,000	940,000	940,000	940,000	940,000	5.3%	940,000
Category III Investments		10,230,000	10,230,000	10,230,000	10,230,000	10,230,000	57.5%	10,230,000
Advancement Awards			200,000	250,000	400,000	600,000	3.4%	600,000
Total Operating/Strategic/ Stabilization Grants	11,231,600	11,470,000	11,570,000	11,620,000	11,770,000	11,970,000	67.3%	738,400
Total Other Funding	200,000	260,000	261,500	263,045	264,636	316,275	1.8%	116,275
DIRECT INVESTMENTS IN CULTURAL PARTNERS	11,431,600	11,730,000	11,831,500	11,883,045	12,034,636	12,286,275	69.1%	854,675
DIRECT INVESTMENTS IN COMMUNITY ACTIVITIES	495,000	450,000	575,000	675,000	775,000	850,000	4.8%	355,000
ARTISTS/CREATIVE INDIVIDUALS								
Public Art Direct Costs	1,261,538	1,275,000	1,275,000	1,275,000	1,275,000	1,275,000	7.2%	13,462
Artists/Creative Individuals	110,000	185,000	285,000	385,000	450,000	500,000	2.8%	390,000
DIRECT INVESTMENTS IN ARTISTS/ CREATIVE INDIVIDUALS	1,371,538	1,460,000	1,560,000	1,660,000	1,725,000	1,775,000	10.0%	403,462
DIRECT INVESTMENTS IN EDUCATION PARTNERS	1,259,333	1,339,613	1,420,801	1,502,925	1,586,013	1,670,094	9.4%	410,761
TOTAL DIRECT INVESTMENTS	14,557,471	14,979,613	15,387,301	15,720,970	16,120,650	16,581,369	93.3%	2,023,898
INDIRECT PROGRAM SERVICES:								
Investment in Prof. Skill Development - Cultural Partners	44,500	75,000	125,000	150,000	200,000	250,000	1.4%	205,500
Investment in Prof. Skill Development - Artists	30,000	45,000	55,000	75,000	85,000	100,000	0.6%	70,000
Constituent Services & Civic Engagement:								
Audience Development subtotal	462,500	500,000	550,000	600,000	650,000	700,000		237,500
Cultural Tourism Initiatives	40,000	60,000	75,000	80,000	90,000	100,000		60,000
Other Misc	14,300	50,000	50,000	50,000	50,000	50,000		35,700
Investment in Constituent Services & Civic Engagement	516,800	610,000	675,000	730,000	790,000	850,000	4.8%	333,200
TOTAL INDIRECT INVESTMENTS	591,300	730,000	855,000	955,000	1,075,000	1,200,000	6.7%	608,700
TOTAL DIRECT & INDIRECT INVESTMENTS	15,148,771	15,709,613	16,242,301	16,675,970	17,195,650	17,781,369	100.0%	2,632,598

Information presented is preliminary and is expected to change. It is contingent upon funds available, annual review and approval by ASC Board of Directors.

B. COMMUNICATION STRATEGY

Rollout of the Strategic Plan has begun via articles in local publications and meetings with community leaders and cultural partners. To further communicate the benefits, impact and goals of ASC's Strategic Plan, a series of tactics will be implemented.

Executions will include the complete plan with a fact sheet for key stakeholders including the board, staff, cultural partners, major donors and elected officials. A tri-fold brochure featuring key points will be created for larger distribution, and both versions of the plan will be available on ASC's Web site.

Messages will educate target audiences about how the Strategic Plan will build long-term sustainability of cultural organizations and individuals, grow community involvement and shape a vibrant cultural life for all of Charlotte-Mecklenburg.

Successes of the plan will be communicated via media briefings; press releases; ASC's annual report, a donor e-newsletter and event strategy.

C. INFRASTRUCTURE ANALYSIS

ASC is committed to strong stewardship of the community's resources. This commitment is demonstrated in the consistency of financial results. ASC will continue to benchmark its financial investments in the community and itself against peer organizations throughout the country and against local non-profit entities. Specifically, ASC will evaluate its cost of fundraising versus dollars contributed, its overhead costs and infrastructure needed to execute its mission. Attention will be given to best practices, operational effectiveness, donor expectations and trends over time.

“By supporting creative individuals and emergent creative activity, ASC invests in the open expression of who we are today; right here, right now; and empowers true creators, not cultural curators.”

David Tang, Artistic Director, Firebird Arts Alliance





appendix a

ASC HISTORY

ASC was originally founded in 1958 as the Charlotte Arts Fund, a united community appeal to raise private sector funds to support arts and science organizations and serve as a clearinghouse for cultural events. During its first united appeal, the fund raised \$63,000 to support eight organizations. In 1962, the organization was renamed the United Arts Council, and its growth paralleled the establishment of the National Endowment for the Arts and the North Carolina Arts Council. In 1974, the Cultural Action Plan, led by business, government and cultural leaders, recommended development of cultural facilities in the center city and that the agency be reorganized to meet the growing needs of the arts community. In June 1975, the United Arts Council became the Arts & Science Council of Charlotte-Mecklenburg and emerged as the leader of local cultural development. Project support and services were added to its existing program of providing operating support to major arts and science organizations. In addition, the City of Charlotte and Mecklenburg County designated the Arts & Science Council as their local arts agency; local public funding through the Council began.

Subsequent Cultural Action Plans in 1991, 1998 and 2004 took into consideration the continued growth of the Charlotte-Mecklenburg community by addressing issues of diversity, private sector support, institutional stability, endowments, community-based programming, audience development, cultural tourism, public art and cultural facilities. As a result of the 1998 plan, history and heritage were added to the scope of ASC's mission. Over the past 15 years, ASC has experienced

tremendous growth. Thanks to our public-private partnerships and the community's generous support of arts, science, history and heritage, Charlotte-Mecklenburg is now a model of cultural support for cities across the country.

Today, ASC has become one of the largest local arts agencies in the U.S. with an annual budget of \$19 million. It serves and supports Charlotte-Mecklenburg's cultural community through grant-making, planning, programs and services to ensure a vibrant community enriched with arts, science, history and heritage. ASC combines resources from its Annual Fund Drive, allocations from local, state and federal governments, and its endowment to support cultural organizations, cultural educational programs, community-based arts, science and history/heritage projects, and creative individuals throughout the region. ASC is comprised of five functional areas, all of which have undergone extensive work in strategic planning in support of ASC's mission, vision and strategic objectives. They are Cultural & Community Investment, Marketing & Communications, Development, Finance & Operations, and Executive.

In light of its 50th anniversary, as well as the rapidly changing Charlotte-Mecklenburg community, many factors pointed to this occasion as an opportune time to take stock of ASC's mission, vision and strategic objectives - to ensure ASC is well positioned as a forward thinking and oriented cultural leader for the Charlotte-Mecklenburg community of the 21st century.

appendix b

CHANGES TO THE INVESTMENT MODEL

In July 2006, ASC's Grants & Services, Planning & Programs and Public Art Departments were merged into a new Cultural & Community Investment Department (CCI). The department was charged with developing a comprehensive and integrated approach to guide ASC's portfolio of funding, programs and services to the Charlotte-Mecklenburg community. Over the first half of FY 2007, CCI staff and Board volunteers developed a strategy for ASC's portfolio of direct (funding) and indirect (programs and services) support to meet the needs of cultural institutions, community-based programs and creative individuals. Additionally, the changes proposed were informed by annual evaluation and feedback from applicants and recipients of ASC's community and individual artist grant programs and a Business Improvement Team that reviewed and recommended changes to ASC's operating support grant program. This new approach was built on the recommendations of the 1998 Cultural Action Plan, which envisioned a comprehensive approach to cultural development that included the traditional funding role played by ASC since 1958, along with increased cultural activity at the neighborhood and community level and building the capacity to succeed in volunteers, professional staff and creative individuals.

Key changes to ASC's Investment Model include:

Operating Support

- Changing the existing Basic Operating Grant and Annual Support Grant programs into a three-tiered investment program based on budget size: Operating Support I (budgets of \$50,000 - \$299,999); Operating Support II (budgets of \$300,000 - \$999,999); and Operating Support III (budgets over \$1 million).
- Instituting matching requirements for operating support grants resulting in a cap on the percentage of revenues from operating funds that ASC invests in cultural organizations: Operating Support I (2:1 match); Operating Support II (3:1 match); Operating Support III (4:1 match).
- Providing multi-year funding for eligible organizations in Operating Support II (two years) and Operating Support III (three years) categories.
- Moving from a citizen-based panel review process to one that will include ASC Board members and peer professionals (regional and national).

- Phasing in the review process and matching requirements over the 5-year period covered by the plan.
- Establishing an Advancement Fund to invest in strategic goals, excellence and transformational efforts by operating support recipients.
- Holding funding for base operating support flat over the plan period while investing new dollars in the Advancement Fund.

Community-Based Project Support

- Splitting the current Cultural Project Grant program into two categories: 1) Cultural Project Investments to support arts, science, history and heritage programs at the community/neighborhood-based level and 2) Access Investments for non-arts, science, history or heritage organizations that use cultural programming to advance their program goals.
- Expanding public art efforts to neighborhoods through strategic partnerships with schools, parks and community centers.
- Expanding opportunities with private developers to encourage public art within site planning.
- Increasing support to community-based programming over the plan period to meet the growing demand for programming dispersed across Mecklenburg County.

Support for Creative Individuals

- Establishing a Creative Individual-in-Residence program to place artists and other creative individuals in neighborhood-based settings, institutions or corporations - to address community issues and expand access to cultural programming.
- Establishing a Creative Renewal Fellowship program to provide support for exploration, learning and renewal of creative individuals and cultural administrators.
- Establishing ASC Honors to recognize life-time achievement in the arts, sciences, history and heritage by Mecklenburg County residents.
- Increasing support for the Regional Artist Project Grant program to meet the growing needs of emerging and established artists for project support.

appendix c

Capacity Building

- Expanding current Audience Development efforts through increased funding of marketing and advertising to increase awareness, participation and ultimately support of local cultural organizations and programs.
- Developing a comprehensive program of professional development opportunities for volunteers and professional staff of cultural organizations to increase their capacity to meet the needs of a rapidly growing community.
- Developing creative individuals to increase their capacity to sustain themselves and become an integral part of the creative fabric of the community.
- Expanding technical assistance support, including support for consultants, scholarships and organizational and executive coaching.
- Expanding Web-based services, networking opportunities and development of consolidated back-office support systems and services.

Other

- Eliminating the Affiliate and Associate designation of some cultural partners.
- Investing in new and emerging creative activity currently not supported by ASC.
- Expanding eligibility for the McColl Award to support the creation of a new work to include all Mecklenburg County cultural organizations and creative individuals.
- Operating the McColl Award, ASC Honors and Creative Renewal Fellowship programs in a three year rotation cycle.

METHODOLOGY

From the beginning, the clear mandate of the strategic planning process was to work in a manner as cross-functional as possible; for example, we took the opportunity to assign cross-functional teams to brainstorm strategic activities, followed by cross-functional work on developing metrics by which to measure success by strategic objective. We undertook all activities in an iterative and consensus-building manner, being careful to schedule many listening events with our cultural partners and key constituents. Janet G. Alford and Diane L. Mataraza were engaged as consultants to assist in the development of the Strategic Plan.

The following activities and information-gathering processes were used:

Strategic Planning Oversight Committee

The Strategic Plan, while internal, is based on advice and counsel from the community as a whole. A Strategic Planning Oversight Committee of 13 members (listed in Appendix E) was appointed in the spring of 2007 to guide and oversee the planning process. The committee was comprised of representatives from ASC's Board of Directors as well as the cultural and business communities. Their role was to act as a sounding board, to steer the plan development at critical junctures, to provide expertise as important contributors to our early diagnostic work, and to regularly update the ASC Executive Committee and Board of Directors on the planning process, emerging themes and strategies. The committee met on a regular basis to provide guidance to the staff and consultants, and to review drafts of interim reports and the final plan document. They approved the recommended Strategic Plan on February 26, 2008.

Board of Directors

The ASC Board of Directors was actively involved throughout the planning process through work sessions designed to provide focused discussion and feedback on proposed changes to ASC's mission, vision, portfolio of funding, and programs and services. In addition to group work sessions, each member of the Board was invited to meet with a member of the Executive Committee and ASC staff Leadership Team to review a draft of the plan prior to formal consideration of the plan at the Board's March 2008 meeting.

Strategic Planning Retreat

A two-day Strategic Planning Retreat was held in September 2007. Participants included members of the Strategic Planning Oversight Committee, members of the ASC staff Leadership Team and key associates from the staff. The retreat included a review of key proposals and consensus around strategic themes, and strategies to be included in the final plan. Work groups developed recommended tactics to advance strategic objectives and a framework for the metrics to be used to measure the success of implementation efforts.

Constituent Meetings

Constituent meetings began in early 2007 and continued in March 2007. Meetings were held for operating support recipients, project recipients, arts education partners and individual artists (individual participants listed in Appendix E). In initial meetings, participants were asked to brainstorm on the following:

- How do you envision your organization a decade from now?
- Will your mission remain the same?
- What will your offerings look like?
- What will your staffing look like?
- Who will you be serving? How, when and where?

In September 2007, a second round of constituent meetings was held to present strategies and process changes under consideration for inclusion in the Strategic Plan, and to provide the opportunity for feedback and modification to the ideas. Multiple meetings were held throughout Mecklenburg County for volunteer and professional leadership of cultural organizations, community-based project recipients and creative individuals.

A Communications Group (list in Appendix E) was appointed representing the volunteer and professional leadership of cultural organizations to recommend strategies for presenting proposed changes and processes in a clear and understandable manner to cultural partners.

A Major Cultural Organization Task Force (list in Appendix E) was appointed for representatives from cornerstone cultural institutions, both volunteer and professional staff, the Strategic Plan Oversight Committee and ASC staff Leadership Team to review areas of concern and to present recommendations for clarification, strategy modification and communications.

Interviews

Interviews were held with 23 key donors and civic leaders (list in Appendix E). They were asked the following questions:

- What do you value most about Charlotte's cultural sector today (i.e. arts, science and history organizations; cultural activities across the community; artists and their work)?
- What in Charlotte's cultural sector today would you like to change, see more of, see less of, etc.?
- In addition to financial investment, what roles/functions do you think ASC should play/provide to strengthen Charlotte's cultural sector?
- ASC has for 49 years raised financial resources primarily via an annual workplace fundraising model based on an annual workplace campaign. How viable is this model, going forward? If the environment changes for the current model, how might it change and how should ASC respond? What advice do you have for how ASC might develop multiple revenue channels?
- Ten years from now, what outcomes or conditions would lead us to conclude that ASC has been effective and successful in supporting Charlotte's cultural sector?
- How should ASC's success be defined (reviewed working definition of success – a vibrant cultural life)? On a scale of 1-10 (1 is high; 10 is low), how successful is ASC today vs. the working definition of success?

Surveys

Additionally, ASC Board members and staff, operating and project support recipients and creative individuals were asked to participate in online surveys. Results are included in Appendix D.

Historic Document Review

To inform the plan development, board, staff and the consultants reviewed existing reports and plans including the 1998 Cultural Action Plan, 1995 Arts Education Plan, 2004 Cultural Facilities Master Plan, North Mecklenburg Cultural Plan, Matthews, Mint Hill and Pineville Cultural Plans, 2006 Audience Development Research and Plan, results of annual Cultural Life in Mecklenburg County public opinion research, historical financial information and grant recipient data and reports.

appendix d

SURVEY RESULTS

Web-based surveys were used as part of the information gathering process. The surveys and findings:

Board Survey

In addition to demographic questions and questions about length of service on cultural and other non-profit boards, members of the ASC Board responded to these questions (percent or average rank indicates survey results):

1. In your opinion, what is the single most important factor influencing change in the Charlotte-Mecklenburg cultural sector?
 - a. Growth of new residents from other parts of the region/country: 30%
 - b. Increase in population throughout the county (towns throughout Mecklenburg County): 20%
 - c. Shifts in arts and cultural tastes and preferences (due to changing demographics and generational shifts): 45%
 - d. Other: 5%
2. In order of importance, please rank ASC's organizational strengths - 1 being greatest strength, 6 being least strength.
 - a. Fundraising abilities: 1.95
 - b. Internal staff and board composition (human capital): 2.5
 - c. Leadership in cultural development of community: 2.55
 - d. Investment and impact on community through grant distributions: 3.6
 - e. Ability to increase participation in the cultural community: 4.9
 - f. Enhancement of appreciation of cultural / community: 5.5
3. In order of significance, please rank ASC's challenges - 1 being greatest challenge, 6 being least significant challenge.
 - a. Responding in creative and relevant ways to the new generation of cultural consumers: 2.0
 - b. Managing donor relationships - corporate and individual: 3.85
 - c. Making investments to increase capacity and skills in arts and cultural organizations: 2.75
 - d. Human resources and succession planning (staff and board): 4.30
 - e. Planning for uncertainty or volatility in revenue streams: 3.15
 - f. Unrealistic expectations from donors, grant recipients or community: 4.05

4. What steps do you believe ASC should be taking now to address the most significant challenges listed above? Answers open-ended; verbatim responses follow:

- a. Finding a safe and affordable place for emerging artists - as Lee says "get funky." More marketing and outreach to our new customers.
- b. I believe we have started the process with the Strategic Plan but know it will take some time, frustration and compromise.
- c. ASC needs to first determine the position it wants to hold in the community; then realign the marketing accordingly.
- d. Gathering relevant information to determine approach addressing this challenge.
- e. By maintaining that influence and leadership in the community so that the staff, board members, and influential people are ready to respond and that group is diverse enough to do so.
- f. Engage consumers in high-level discussions of their hopes for the cultural community in Mecklenburg County.
- g. In follow-up to the marketing consultation that was done two years ago, need to engage leadership of all arts groups in County to model best practices in their arts area as well as strategic thinking and planning to build stronger plans for future.
- h. Creating a "face" for the overall umbrella of the arts, etc. in Mecklenburg County. Increasing Charlotte as a NATIONAL presence for arts and as a diverse arts community - particularly on the East Coast. Creating methods of self-sustainability for our arts organizations in their ability to plan - recruit and retain strong and efficient Board members that will build the QUALITY of their programming and develop AUDIENCE for their product. Give these arts organizations the ability to improve their operations through efficiencies spear-headed by ASC. Promote diversity of product through existing Arts Providers.
- i. Where available, help catalyze and grow more diverse programming opportunity through special funding opportunities.
- j. Successful completion and startup of the Strategic Plan.
- k. Addressing regionalism, understanding the generational dynamic and how those consumers want to be communicated with, served, asked, managed. Continue

to support affiliates in their efforts to better promote their properties and become more relevant to the next generation of cultural customers.

- l. Involve a large and diverse group of artists and cultural consumers in the strategic planning process, and consider taking the process on the road to other communities that have successfully done so.
- m. Getting more young people on ASC Board and on Annual Fund Drive.
- n. Working to increase the financial independence of the various affiliates and change the mindset of their looking to the ASC for funding growth. Spills over into increasing their patron support, attendance, relevance in the community, etc.
- o. Continue to reach out to corporate and individual donors. Cultivate new contacts in the community.
- p. Continue efforts to involve broad cross section of citizens with different cultural experiences, economic status and neighborhoods. Underscore the ECONOMIC impact of arts and culture...don't be timid!
- q. Finding and implementing the best ways to communicate with donors. Making sure what you communicate is the right message and not too much or too little.
- r. Through the strategic planning process, ASC should be considering/creating new revenue streams along innovative ways of connecting passions to giving. We should also be thinking ahead to address changes to workplace giving campaigns.
- s. End the "uptown-centric" approach to events, fundraising and activities. Hold events out in the community among the common, average people. ASC is tying its future unrealistically tightly to corporate fortunes in the uptown core. That's why your true base of "uncoerced" donors is so incredibly small for a metropolitan area of this size.
- t. Helping create capacity in cultural groups is a major opportunity. Continue to focus on marketing and communications - that is a growing strength. Revenue models among cultural institutions need to be re-engineered and a consultive role could be very helpful.

5. How do you respond to the following working mission statement: ASC mission is to build appreciation, participation and support for arts and culture in Charlotte-Mecklenburg?

- a. Strongly agree: 52.6%
- b. Agree: 36.8%
- c. Neutral: 5.3%
- d. Other: 5.3%

6. In your opinion, what does "appreciation" involve? Rank in order of importance with 1 being most important factor and 8 being the least important factor.

- a. Valuing artistic programming in the community: 3.11
- b. Increasing the cultural sophistication of the community: 4.16
- c. Increasing arts education in the schools: 3.47
- d. Attracting nationally reputed artists and creative individuals to the community: 4.58
- f. Residents considering arts and culture as an economic driver of the community: 3.05
- g. Increased cultural tourism from outside Mecklenburg County: 5.54
- h. Involving arts and culture as a tool to solve community problems: 5.74
- i. Incorporating innovation and creativity in the workplace: 6.37

7. In your opinion, what does "participation" involve? Rank in order of importance with 1 being most important factor and 7 being the least important factor.

- a. Access to arts and cultural programming for all residents: 3.21
- b. Diversity of audiences, reflective of community demographics: 3.95
- c. Number of tickets sold or program participants: 3.68
- d. Number of repeat participants: 4.32
- e. Number of cultural experiences attended per household per year: 2.47
- f. Capacity utilization of available venues (% of tickets sold to those available): 4.16
- g. Number or % of participants from outside of Mecklenburg County: 6.21

8. In your opinion, what does "support" involve? Rank in order of importance with 1 being most important factor and 9 being the least important factor.

- a. Increased annual fund drive giving to ASC: 3.95
- b. Increased City and/or County funding: 6.05

appendix d

- c. Increased direct financial investment in cultural organizations: 4.89
 - d. Increased number of donors to ASC: 4.00
 - e. Skill and professional development offerings to cultural community (training): 6.26
 - f. Marketing of the cultural community at large: 5.00
 - g. Enhanced ability of cultural organizations to secure their own earned revenue: 3.32
 - h. Increased planned giving and endowment contributions: 6.47
 - i. Increased number of donors to cultural organizations: 5.05
9. In order of importance, please rank the following indicating which role(s) you believe are the most important for ASC to play in the cultural community. Rank in order of importance with 1 being most important and 5 being least important.
- a. Enforcer of accountability to fiscal standards: 3.89
 - b. Cultural leader/advocate: 1.42
 - c. Grantor/funder/investor: 3.16
 - d. Stimulator of creative distinctiveness and quality programming: 3.32
 - e. Nurturer of new forms of arts, science and history across the community: 3.21
10. Of the role you ranked highest above, is ASC playing that role currently to your satisfaction?
- a. Yes, absolutely: 36.8%
 - b. Somewhat: 63.2%
11. If not, what should ASC be doing to improve its performance in this area? Answers open-ended; verbatim responses follow:
- a. Try to make the face of ASC appear throughout the community under a variety of cultural promotions, not just during the annual fund drive. More political and out front appearances.
 - b. Not completely sure given my short tenure on board.
 - c. Think small. Get down to neighborhood, town, park and rec department level.
 - d. The only reason I didn't rank it higher is that there is still a lingering misperception about the role ASC plays and should play in the community and I believe this is one of our major marketing/PR challenges.
 - e. I would like to see ASC helping to facilitate an Arts planning initiative to stimulate exciting, captivating, top quality "special" programming that would not only draw tourists from throughout the southeast and the country - but to raise the bar in the quality of programs/productions for our community residents.
- f. Greater marketing efforts on behalf of the sector.
- g. ASC still by and large seen as a fundraiser, united arts fund. Does lots behind the scenes that may not be recognized by the general population.
- h. More risk taking.
- i. I believe the ASC could do more to increase the overall number of people going to cultural activities. If we could reach more people, we could get more people going and giving to the arts.
- j. Get more in tune with what the MAJORITY of the region's citizens like (or would like) about arts and culture, insist that funded affiliates program to those tastes, market this programming to the entire community (not just a snooty few who think their taste in art is more sophisticated than the rest) and see if the "little people" don't ultimately reward you with their dollars - they won't be Vanguard dollars, but they will be sincere dollars across a broader base. When ASC receives ANY funding from Charlotte or Mecklenburg County, ASC's work should be in behalf of ALL of the residents, not just the ones in 28207, 28209, 28211 and 28269. ASC is an elitist organization, from the top down.
- k. Being more proactive and less reactive.
12. Which of the following do you feel should be a measure of ASC's organizational success?
- a. Increased participation in cultural venues across the county: 89.5%
 - b. Increased ASC Annual Fund Drive revenue in excess of inflation: 36.8%
 - c. Financial stability of the cultural sector: 36.8%
 - d. ASC's ability to maintain a ratio of administrative and fund raising expenses less than 15% of overall revenue: 0%
 - e. Expansion of number of donors in ASC Annual Fund Drive: 36.8%
 - f. Increase in cultural programming outside of center city: 15.8%
 - g. Increase in artistic excellence of cultural programming: 63.2%
 - h. Increased civic funding (city and county): 10.5%
 - i. Increase in financial support from ASC to the cornerstone cultural organizations: 0%

j. Other: 10.5%

13. What should ASC leadership be mindful of as we move forward with the Strategic Plan? Answers open-ended; verbatim responses follow:

- a. That the evolution of cultural leadership in this community is going to get messier, complex, "funky" and different. Charlotte likes neat and tidy, but the creative class isn't always that way. Encourage more acceptance.
- b. Cognizant of rapid change and how it affects our group and how to ensure we remain adaptable and flexible.
- c. That the plan we make for Charlotte today must take into account what Charlotte is going to look like at the end of the planning period - which is very different.
- d. Need to galvanize dissident voices into some agreed upon common goals.
- e. Are the arts supported in the Charlotte area to the extent that there are a large number of artists who can afford to live and work here, and they would consider doing so as opposed to viewing the Charlotte area as a stop along the way to somewhere else?
- f. ASC has to walk a careful line between supporting the promotional efforts of the affiliates and conducting promotional efforts for the affiliates. Let's "teach the affiliates to fish" instead of "giving the affiliates a fish"! At a higher level, ASC has to continue to lead the promotion of culture in the community, both to residents and visitors alike.
- g. Being focused and deliberate in its undertakings and very clear in communicating new strategic directions.
- h. The ASC is in a unique position to create an environment for living that transcends art and culture...it can create a "sense of community" that binds us together, even as we become more diverse and our population continues to grow. No other organization can match ASC's potential!
- i. ASC needs to step out of the uptown core and see how the vast majority of non-bank employees and their families live and what they enjoy. It is not necessary for us to be "bleeding edge" and try to show how "sophisticated" we are. Help the affiliates reach out to the average person - which, by the way, in the world of NASCAR does NOT mean "poor person".
- j. Not trying to move too quickly.

Staff Survey

In addition to demographic questions and questions to determine length of employment in cultural organizations, members of the ASC staff responded to the following (percent or average rank indicates survey results):

1. In your opinion, what is the single most important factor influencing change in the Charlotte-Mecklenburg cultural sector?
 - a. Growth of new residents from other parts of the region/country: 13%
 - b. Increase in population throughout the county (towns throughout Mecklenburg County): 13%
 - c. Shifts in arts and cultural tastes and preferences (due to changing demographics and generational shifts): 65.2%
 - d. Other: 8.7%
2. In order of importance, please rank ASC's organizational strengths - 1 being greatest strength, 6 being least strength.
 - a. Fundraising abilities: 1.6
 - b. Internal staff and board composition (human capital): 2.39
 - c. Leadership in cultural development of community: 3.39
 - d. Investment and impact on community through grant distributions: 2.96
 - e. Ability to increase participation in the cultural community: 5.13
 - f. Enhancement of appreciation of cultural community: 5.52
3. In order of significance, please rank ASC's challenges - 1 being greatest challenge, 6 being least significant challenge.
 - a. Responding in creative and relevant ways to the new generation of cultural consumers: 2.3
 - b. Managing donor relationships - corporate and individual: 3.57
 - c. Making investments to increase capacity and skills in arts and cultural organizations: 2.96
 - d. Human resources and succession planning (staff and board): 5.04
 - e. Planning for uncertainty or volatility in revenue streams: 3.61
 - f. Unrealistic expectations from donors, grant recipients or community: 3.52

appendix d

4. What steps do you believe ASC should be taking now to address the most significant challenges listed above?

Answers open-ended; verbatim responses follow:

- a. ASC needs to transform the perception of being a fundraising entity into one of an overall cultural promoter/grantor/clearinghouse/etc. of which fundraising is just one aspect of the organization.
- b. Looking at ways to raise more money and distribute through funding - which you are already doing.
- c. This is an issue that every organization struggles with. In many ways, I think it will come from a proper expansion of partnerships as mentioned in the strategic planning. Also, we need to reach more of the non-arts going, science/history interested 20+ residents. We need some target marketing that states what life would be like without the groups ASC supports.
- d. At this time ASC is taking the steps with new initiatives and grants being offered.
- e. Help established organizations become more financially independent while developing excellence. Expand funding support to emerging artists, creative individuals, and neighborhood initiatives. Broaden donor base to grow funding resources.
- f. ASC needs to continue to utilize technology and find creative ways to improve the organization and relationships with all of our constituents.
- g. Developing a multi-channel approach to resource development. Using our distribution activities to create revenue opportunities.
- h. The strategic planning process is the most thoughtful way (with donors and stakeholders) to begin to develop strategies and action steps to address this challenge.
- i. Engage more newcomers & young professionals in the process. Determine marketing strategies that address their concerns/ideas/etc.
- j. Realigning its investment strategies, based upon demographic/market research and ASC's known history of organizations and programs. Rewarding and seeking new models to stimulate innovative programs, initiatives, services.
- k. Take the corporate hat off occasionally and try to think different. Not everything has to be quantified and rationalized. I believe in being a good steward with the task that we are charged with, yet if you listen carefully to the artists and the people that are committed to cul-

ture sometimes that thing they do does not fit a mold or model.

- l. 1. Position staff structure to prioritize donor relations.
2. Prioritize areas of need for increasing capacity and provide big impact vs. small steps in many areas.
- m. Although we are very good at workplace campaigns, our success seems to be leveling out. We need to develop new and additional strategies for major and foundation donors outside of workplace giving.
- n. ASC should help these organizations become more self-sustainable. Help them build their organization into a very solid, viable part of the cultural community. Help them find their own identity and relay donors to organizations that align with their interests and passions.
- o. I think we are on the right track with new distribution models encouraging innovative/emerging art forms. The primary limitation we have is that ASC is not the provider of cultural programming, so we are having to work as an influencer/coach for cultural providers rather than simply being able to "fix" the problem ourselves...much more delicate negotiation and harder to truly control outcomes. Our audience development and capacity building efforts are critical tools in addressing this particular challenge - we need to be sure we are increasing/continuing investment in this area.
- p. Evaluation and feedback from outside sources both nationally and locally. When we discover the latest and greatest ways to capture this new generation, we need to move quickly and make the changes so that we do not lose the support and enthusiasm that we have.
- q. 1. A significant investment in technology and staff training/professional development.
2. More corporate and individual volunteer opportunities through ASC in Arts & Cultural activities through-out Charlotte.
3. More of an investment in grassroots projects. ASC in Arts & Cultural activities through-out Charlotte.
- r. Make sure that our communication is constant and well known about our changes.
- s. Continue researching new means of technology that extend to this new generation of cultural consumers, then implement these means into all sectors of ASC (marketing/development/etc) to build and maintain interest in our organization.

- t. I believe that the work being done by CCI & ASC to re-define the ways we invest in arts and culture is right on target.
- u. Cultivate personal relationships with new and existing donors, rather than relying on workplace giving.
- v. Hire edgy GenXers with awesome technical skills i.e. podcasting, YouTube videos, blogging, vlogging, etc. Strategize intergenerational and international vision.
- w. I believe the Strategic Plan is a good first step.
5. How do you respond to the following working mission statement: ASC mission is to build appreciation, participation and support for arts and culture in Charlotte-Mecklenburg?
- Strongly agree: 52.2%
 - Agree: 39.1%
 - Other: 8.7%
6. In your opinion, what does “appreciation” involve? Rank in order of importance with 1 being most important factor and 8 being the least important factor.
- Valuing artistic programming in the community: 1.5
 - Increasing the cultural sophistication of the community: 5.7
 - Increasing arts education in the schools: 3.4
 - Attracting nationally reputed artists and creative individuals to the community: 4.9
 - Residents considering arts and culture as an economic driver of the community: 3.0
 - Increased cultural tourism from outside Mecklenburg County: 5.7
 - Involving arts and culture as a tool to solve community problems: 5.2
 - Incorporating innovation and creativity in the workplace: 6.2
7. In your opinion, what does “participation” involve? Rank in order of importance with 1 being most important factor and 7 being the least important factor.
- Access to arts and cultural programming for all residents: 2.3
 - Diversity of audiences, reflective of community demographics: 3.52
 - Number of tickets sold or program participants: 2.57
 - Number of repeat participants: 4.7
 - Number of cultural experiences attended per household per year: 3.52
 - Capacity utilization of available venues (% of tickets sold to those available): 4.96
- Number or % of participants from outside of Mecklenburg County: 6.43
8. In your opinion, what does “support” involve? Rank in order of importance with 1 being most important factor and 9 being the least important factor.
- Increased annual fund drive giving to ASC: 4.30
 - Increased City and/or County funding: 6.04
 - Increased direct financial investment in cultural organizations: 5.13
 - Increased number of donors to ASC: 4.39
 - Skill and professional development offerings to cultural community (training): 4.70
 - Marketing of the cultural community at large: 5.35
 - Enhanced ability of cultural organizations to secure their own earned revenue: 4.22
 - Increased planned giving and endowment contributions: 5.70
 - Increased number of donors to cultural organizations: 5.17
9. In your current role, do you see alignment between your job description and the working mission statement - “To build appreciation, participation and support for arts and culture in Charlotte-Mecklenburg”?
- Appreciation
 - Strongly aligned: 43.5%
 - Aligned: 34.8%
 - Neutral: 21.7%
 - Slightly aligned: 0%
 - Not aligned: 0%
 - Participation
 - Strongly aligned: 43.5%
 - Aligned: 30.4%
 - Neutral: 17.4%
 - Slightly aligned: 0%
 - Not aligned: 8.7%
 - Support
 - Strongly aligned: 60.9%
 - Aligned: 21.7%
 - Neutral: 13%
 - Slightly aligned: 4.3%
 - Not aligned: 0%

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10. What do you believe ASC could/should do to strengthen or clarify alignment of your role to the proposed mission ?

Answers open-ended; verbatim responses follow:

- a. My job is focused on the support functions. ASC as a whole is well aligned. My job is just one part, so I am not sure that all pieces of the mission need to be part of my job description.
- b. I don't see a way because of my position since I remain in office most of the time. Other than on the phone/walk-in if asked can I give feedback to a potential donor.
- c. Help employees participate in more cultural events by encouraging organizations to occasionally provide free or deeply-discounted tickets to staff so everyone can afford to go and take family/friends. Participation breeds appreciation, which would fuel passion for our work.
- d. I see an alignment but I think this is a difficult question to answer for some. It might be helpful to devote a staff meeting to a discussion of current roles against the working mission because it's unclear what roles will be in the future.
- e. Broaden the language.
- f. Not sure. I believe this is a personal choice and not something that ASC can drive home.
- g. Clear messaging for donors through fund drive materials but also for volunteers, IHC's, etc.
- h. I believe my role is aligned with the mission.
- i. Gain more new employee campaigns in the fund drive and seek newcomers to Charlotte to be active in the arts and cultural community.
- j. Very clear alignment.
- k. Pay a living wage.
- l. Articulate performance measures that relate to my position that advance the mission of the ASC.

11. In your opinion, is the Board aligned with the working mission statement - "To build appreciation, participation and support for arts and culture in Charlotte-Mecklenburg?"

- a. Appreciation
 - i. Strongly aligned: 26.1%
 - ii. Aligned: 43.5%
 - iii. Neutral: 21.7%
 - iv. Slightly aligned: 4.3%
 - v. Not aligned: 4.3%

b. Participation

- i. Strongly aligned: 21.7%
- ii. Aligned: 39.1%
- iii. Neutral: 30.4%
- iv. Slightly aligned: 8.7%
- v. Not aligned: 0%

c. Support

- i. Strongly aligned: 34.8%
- ii. Aligned: 47.8%
- iii. Neutral: 17.4%
- iv. Slightly aligned: 0%
- v. Not aligned: 0%

12. Is there something that we should be doing to strengthen the board's alignment with the mission? Answers open-ended; verbatim responses follow:

- a. I believe ASC is doing that with the current focus on strategic planning.
- b. An occasional five-minute performance from a cultural partner as part of a Board meeting might strengthen their passion.
- c. Engage the Board in our strategic planning process, and in the process deepen their understanding of the opportunities and challenges within the cultural community.
- d. The Board should be required to attend a certain number of cultural events each year. It would be great if they would take other members of the community with them to cultural events who might not attend on their own.
- e. I'm not certain if our Board clearly understands their role in appreciation and participation. We should/could track board member attendance to cultural activities in addition to the staffs. If our Board members are not cultural consumers than how can we expect others to be?
- f. Define what we mean by each and then have opportunities for engagement by way of definition. For example, for appreciation - could it be to over the course of the year have five talks with newcomers/non-cultural participants about the activities in the community.
- g. Continue the discussion. Understand the need for measurement of above items. Statement does not articulate our long term leadership value in elevating culture within community agenda.

- h. Making sure they have an answer to how does ASC build appreciation, participation and support in the community.
- i. NA.
- j. I think ASC historically has been primarily focused around the "support" model, and as such, the Board is most familiar/comfortable with this piece of the mission. The appreciation/participation components are far newer in terms of major focus areas for ASC, and therefore something new we need to emphasize as a major part of Board members' orientation and ongoing education. We need to take advantage of every opportunity to help our Board members better understand the role they play as advocates for AND participants in the cultural community. They need to be out going, doing, promoting, etc. just like the staff. I'm not sure the "dot" system is applicable here, but perhaps coming up with some way to share their own experiences, engagement, etc. OR making sure we are regularly communicating a wide range of upcoming cultural events could help enhance this effort.
- k. Increased communication and encouraging active involvement in the cultural facilities.
- l. Continued Board education and engagement beyond Board meetings.
- m. Give the Board and the public more entrances to cultural community (to rub shoulders with creative groups & individuals) or opportunities to be involved in more than passive giving and attending.
- n. Specific assignments to committees that advance the mission of the organization might be helpful.
13. In order of importance, please rank the following indicating which role(s) you believe are the most important for ASC to play in the cultural community. Rank in order of importance with 1 being most important and 5 being least important.
- Enforcer of accountability to fiscal standards: 4.13
 - Cultural leader/advocate: 1.26
 - Grantor/funder/investor: 2.57
 - Stimulator of creative distinctiveness and quality programming: 3.26
 - Nurturer of new forms of arts, science and history across the community: 3.78
14. Of the role you ranked highest above, is ASC playing that role currently to your satisfaction?
- Yes, absolutely: 43.5%
 - Somewhat: 39.1%
 - Needs improvement: 17.4%
15. If not, what should ASC be doing to improve its performance in this area? Answers open-ended; verbatim responses follow:
- I believe ASC is on track with being or rather representing Cultural Leaders/advocates.
 - I agree that we should be encouraging programming excellence in established organizations and try to wean them financially, and should be cultivating with more support new and emerging artists, and expanding our donor base so that we have finances to do more of all.
 - Stronger PR strategy in support of the sector and its value to the greater community.
 - We haven't had the courage to tell artists and cultural organizations when they are not meeting our and the community's expectations programmatically. We continue to reward and increase our support in mediocrity. There should be a way to evaluate quality and distinctiveness of the programming and only reward those who exceed our expectations and challenge our thinking and imagination. We should begin to reduce our support of those who simply don't measure up to our community's expectations of quality programming and creative distinctiveness.
 - Assess strategies for improvement with Board and staff
 - More diverse avenues for fundraising.
 - ASC should take a back seat and let the cultural groups drive.
 - I think we are perceived as a trusted partner in the community on many levels (among the other "power players," so to speak) but not necessarily by average citizens. As we continue our outreach work in neighborhoods, towns, and among emerging groups I think this reputation will grow. The new distribution models also provide a unique opportunity for ASC to (re)position itself as a leader/advocate for the ENTIRE cultural sector (artists, emerging groups, community orgs, etc), not just the major institutions.

appendix d

i. Need to introduce Charlotte to the exciting new stuff going on. Separate ASC from Broadway musicals. They sell themselves and are popular mass culture only one step away from TV.

16. Which of the following do you feel should be a measure of ASC's organizational success?

a. Increased participation in cultural venues across the county: 73.9%

b. Increased ASC Annual Fund Drive revenue in excess of inflation: 26.1%

c. Financial stability of the cultural sector: 52.2%

d. ASC's ability to maintain a ratio of administrative and fund raising expenses less than 15% of overall revenue: 13%

e. Expansion of number of donors in ASC annual fund drive: 34.8%

f. Increase in cultural programming outside of center city: 17.4%

g. Increase in artistic excellence of cultural programming: 56.5%

h. Increased civic funding (city and county): 13%

i. Increase in financial support from ASC to the cornerstone cultural organizations: 4.3%

j. Other: 8.7%

17. How well informed do you feel regarding ASC's mission and activities?

a. Well informed: 65.2%

b. Moderately informed: 21.7%

c. Slightly informed: 13%

18. What additional comments do you have to share with regards to ASC's strategic planning efforts? Answers open-ended; verbatim responses follow:

a. I'm very pleased with this new path the organization is taking and the changes it is trying to bring about for the cultural community.

b. A much needed, ambitious effort.

c. It makes sense!!

d. Please consider all staff for involvement in the strategic planning effort. Please consider diversity in planning. Keep up the great work, I'm happy to be a part of this organization.

e. Don't expect staff to be enthused about ASC giving \$76,000 to a project because the organization has had a "surplus" for two years, when our bonuses disappeared and wage increases barely keep pace with cost of living, much less reward performance and provide incentive. Artistic and creative credentials of this organization are lacking in favor of business experience and degrees. A better balance would benefit the organization and inject refreshing vitality. Example: Look at what Rick Crowley has brought to the table. You can't work with creatives if you don't understand them, and for the most part, this organization has little sophistication, aesthetically speaking. Strive for balance.

Organizational Survey

In addition to demographic questions and questions about type and age of cultural organization, volunteer or professional status of responder, operating and project support recipients were asked to respond to the following (percent or average rank indicates survey results):

1. In your opinion, what is the single most important factor influencing change in the Charlotte-Mecklenburg cultural sector?

- a. Growth of new residents from other parts of the region/country) 27.6%
- b. Increase in population throughout the county: 27.6%
- c. Shifts in arts and cultural tastes and preferences (due to changing demographics and generational shifts): 36.2%
- d. Other: 8.6%

2. In order of importance, please rate the following roles that ASC may play in the future - 1 being most important, 6 being least important.

- a. Continued fundraising (the united campaign to fund arts, science and history): 2.22
- b. Making available (or coordinating with other community entities to make available) a comprehensive portfolio of technical assistance, professional development opportunities and services. The goal would be for these opportunities and services to help organizations achieve success. In other words, strengthen capacity to help organizations better manage, market, promote, fundraise, govern, etc. to achieve their goals and become more self-sufficient: 2.74
- c. Serving as a broker on behalf of the cultural sector (arts, science, history, artists) with other community sectors (economic development, human services, business, tourism, education, etc.) to see that the arts, science and history sector plays a stronger, integral role in important regional agendas: 3.88
- d. Advocating for continued investment by local government in the cultural life of Charlotte-Mecklenburg: 3.64
- e. Forging partnerships and collaborations in ways no organization could easily do on its own to leverage new sources of revenue to fund initiatives in which arts, culture, history and science involvement would be key: 3.82
- f. Building relationships between artists, arts, culture,

history and science organizations and other entities offering cultural programs. For example, YMCA's, libraries, schools, neighborhood centers, parks and recreation departments that are often the first point of exposure for arts participation. In our community, many organizations are already doing this - however, many more could. ASC would create opportunities for arts, culture, history and science organizations to work with these entities to increase regional participation: 4.55

3. Please rank in order of importance to you the following offerings - 1 being highest value, 8 being least value.

- a. Strengthen governance: 5.08
- b. Marketing and audience development: 2.8
- c. Strengthen operations: 4.23
- d. Web-based services: 5.13
- e. Fund development services: 2.9
- f. Networking opportunities: 4.98
- g. Development of shared goods - provide access to discounts in the purchase of goods and services (from supplies, equipment, office furniture and lumber to printers, accountants, designers, lawyers, architects and HR assistance): 5
- h. Scholarships and travel stipends enabling participation in regional, state and national conferences, training, continuing education, and other kinds of professional development both inside and outside the region: 5.9

4. Strengthen governance (rank in order of importance) with 1 being highest value and 3 being least value.

- a. Training opportunities - how to evolve a better, more organized, results-oriented Board: 1.6
- b. Providing facilitators (non ASC Staff) for Board retreats: 2.33
- c. Providing organizational coaches (non ASC Staff) to work with the Board of directors over an extended period of time: 2.08

5. Marketing and Audience Development (rank in order of importance) with 1 being highest value and 3 being least value.

- a. Training opportunities for staff to increase success at attracting more diverse and greater participation: 1.35
- b. How to better use the Web to increase awareness about offerings and attract more participants: 1.95
- c. Other: 2.7

appendix d

6. Strengthen Operations (rank in order of importance) with 1 being highest value and 6 being least value.
 - a. Planning assistance (a bank of consultants and skilled area professionals) to assist with operating and business plans, marketing plans and guidance with successful implementation: 2.35
 - b. Organizational coaches to work with executive leadership and staff members over an extended period to improve operations and success at achieving annual goals: 2.68
 - c. Systems development/technology training to support operations and provide staff with the tools necessary for them to do their jobs: 3.3
 - d. Assistance to improve effectiveness in recruiting and utilizing volunteers: 3.2
 - e. Developing “performance guidelines” for the arts, science and history non-profits to help our organizational metrics for excellence be more aligned with the NC Nonprofit Standards of Excellence: 3.93
 - f. Other: 5.55
7. Web-based Services (rank in order of importance) with 1 being highest value and 7 being least value.
 - a. Searchable artists and organization directory: 3.5
 - b. How we can gain value from Cultural Classifieds: 4.35
 - c. Searchable database for venues (for performances, rehearsals, educational offerings, programming, etc.) in Center City and the suburbs: 2.8
 - d. Virtual incubator to provide helpful information and resources to new and emerging groups: 3.55
 - e. E-newsletters to all constituents: 3.83
 - f. Assistance in database management: 3.8
 - g. Other: 6.18
8. Fund Development Services (rank in order of importance) with 1 being highest value and 8 being least value.
 - a. How to increase individual contributors: 3.13
 - b. How to cultivate sponsorships: 2.68
 - c. The art of grant seeking: local, state, regional and national opportunities: 3.88
 - d. Capital and endowment campaigns: 4.28
 - e. Planned giving: 5.25
 - f. Membership campaigns: 4.5
 - g. Beyond admissions: new business development to maximize earned revenue opportunities: 4.68
 - h. Other: 7.63
9. Networking opportunities (rank in order of importance) with 1 being highest value and 5 being least value.
 - a. Among and between organizations and creative individuals/artists to strengthen and build a cultural sector in which there is a greater exchange of creative ideas and opportunities for collaboration: 2.63
 - b. Convening of Board chairs and executive directors of like discipline organizations: 2.9
 - c. Convening Board chairs and executive directors of like budget organizations: 3.58
 - d. Convening of executive directors of cultural providers with leaders of non-arts entities who provide arts programs (human and social services, parks and recreations departments, youth services, after school providers, YMCA’s, etc.) to increase cross-pollination in programming and outreach: 2.6
 - e. Convening emerging leaders and like staff (marketing, artistic, development staff, etc.): 3.3
10. Please tell us what you think about ASC’s proposed portfolio of financial investments to help build a stronger cultural environment in Charlotte-Mecklenburg (rank order) with 1 being most valuable and 5 being least valuable.
 - a. Change “Grants” to agreements or contracts in which investments would be better aligned with your organization’s goals: 2.6
 - b. The option of multi-year investments for stable, well-run organizations: 2.18
 - c. Defining investment options for like organizations so you would not be at a competitive disadvantage (for example, pools eligible to like budget size, or like discipline or type.): 3.33
 - d. Amending the application and review process to include assessment by peers and one-on-one meetings with ASC staff: 3.25
 - e. Realigning investment criteria so that an organization is not overly dependant on ASC. For example, ASC’s investment would not exceed, say, 20 percent of an organization’s operating budget. Over time, this shift would evolve to help the organization become more self-sufficient: 3.5

11. In order of importance, please rank the following indicating which areas you think ASC should pursue for future assistance to strengthen the cultural sector (rank order) with 1 being most important and 5 being least important.

- a. Affordable housing for artists, scientists, historians or scholars: 3.05
- b. Affordable studio space and work space for artists, scientists, historians or scholars: 2.15
- c. Affordable rehearsal space for performing artists: 2.49
- d. Affordable storage and construction space: 2.59

12. Other thoughts you would like to share. Answers open-ended; verbatim responses follow:

- a. At the meeting ASC talked about supporting and growing the base of new arts organizations. I think dilution and overlap is one of the issues with support for the arts and sciences today. We need fewer, but stronger organizations. Perhaps a trial effort, led by ASC, to merge and consolidate overlapping organizations is worth a try. The history and museum sector is ripe for this, especially as it struggles with attendance and escalating costs.
- b. I think for the community as a whole to foster innovative growth, we will have to work to earn investments rather than compete for grants. The ASC is on the right track by removing the connotation of benevolence and creating a conversation based on a web of partnerships between organizations. In those inter-organizational conversations, growth with velocity can be created for the cultural community as a whole.
- c. I think ASC is wise to create a new model based on new realities. Staying the same is not a viable option. Without thoughtful changes to its role and relationships with affiliates, donors and the community at large, ASC will lose effectiveness and relevance.
- d. I think the above question shows a lack of understanding of the needs of science and historical groups. These groups need on-site facilities or access to reference libraries – not an off-site location. I applaud the ASC for attempting to get to the core of some major long-term issues that cultural groups should be, but are not necessarily, dealing with in appropriate ways. In a nutshell, they need to run themselves more like a for-profit business. The ASC needs to assist organizations in adopting for-profit practices, not supporting continuing bad management practices. In the real world busi-

nesses come and go based on their ability to provide a product that has value to the community. ASC should not create additional burdens by building larger facilities for organizations that cannot support the majority of their own budgets. Larger facilities can create revenue opportunities or budgetary demands. Past performance can provide an indicator of future performance in an organization's financial and program projections and their ability to adapt to the market.

Organizations with poor track records need technical and management support, not a new facility that creates a greater burden. All cultural groups need to increase their endowments to stabilize their operating budgets. Endowment fundraising is difficult because the majority of donors don't understand it and don't have the trust in non-profits to manage it properly. This may be due to the stories about the few non-profits that have spent their principal. Focus on teaching the non-profits to fish.

- e. These questions do not get at true strategic planning to me. If ASC continues as an organization, it must resolve the growing hostility donors feel re: the Annual Drive – too many of those who are giving due to workplace pressures do not feel they derive a real benefit from the ASC. The ASC's positioning as a conduit for funding to cultural groups no longer resonates with the public. What can ASC do to become a vital and treasured contributor in the eyes of donors? Without solving this problem, there will be little long-term benefit to addressing issues of how grant programs are structured or how resources are dedicated.
- f. Are any efforts or resources going toward the Blue Ribbon Committee recommendations for cultural facilities outside Charlotte Center City? Something that has not been discussed in quite some time.
- g. The strategic direction appears to be well founded.
- h. It was challenging determining rankings for each of the items provided; kudos to ASC for embarking on this strategic planning process though I'd caution that there may be a lot of gray between Most Important to Moderately Important items. Also, there appeared to be one question that did not limit you to one place on the scale.

appendix d

Creative Individual Survey

In addition to questions to establish the demographics, art form and age of respondents, creative individuals were asked to respond to the following questions (percent or average rank indicates survey results):

1. Please tell us about the space you need to create.
 - a. I don't need formal work/performance space: 2.6%
 - b. I have inadequate work/performance space: 15.8%
 - c. I need better work/performance space: 26.3%
 - d. I need more storage space: 15.8%
 - e. Other: 39.5%
2. In your opinion, what is the single most important factor influencing change in the Charlotte-Mecklenburg cultural sector?
 - a. Growth of new residents from other parts of the region/country: 34.2%
 - b. Increase in population throughout the county (towns throughout Mecklenburg County): 18.4%
 - c. Shifts in arts and cultural tastes and preferences (due to changing demographics and generational shifts): 26.3%
 - d. Other: 21.1%
3. Please rank in order of importance to you the following offerings - 1 being highest value, 5 being least value.
 - a. Business skill development and entrepreneurial training: 3.5
 - b. Web-based and technology services: 3.72
 - c. Networking and outreach services: 3.03
 - d. Discounts on the purchase of goods and services (from supplies, equipment, office furniture and lumber to printers, accountants, designers, lawyers and architects): 3.88
 - e. Financial investments to help creative individuals/artists: 2.69
4. Business skill development and entrepreneurial training (rank in order of importance) with 1 being highest value and 7 being least value.
 - a. Business or marketing plans/structures: 3.75
 - b. Communications strategy: 3.78
 - c. Bookkeeping, paying taxes: 5.06
 - d. Legal issues, intellectual property: 4.72
 - e. Building a marketable set of objects and/or offerings: 4.25
 - f. Business coaches and mentors: 3.84
 - g. Mentors in my discipline or genre: 3.84
5. Web-based and technology services (rank in order of importance) with 1 being highest value and 6 being least value.
 - a. Assistance with Web site development and technology: 3.06
 - b. Searchable artists and organization directory: 3.94
 - c. Access to computers and equipment, especially for higher-end applications such as digitization: 4.06
 - d. Searchable database for venues (for performances, rehearsals, educational offerings, programming, etc.) in center city and suburbs: 3.41
 - e. Virtual incubator to provide helpful information and resources: 3.25
 - f. E-newsletters: 4.63
6. Networking and outreach opportunities (rank in order of importance) with 1 being highest value and 7 being least value.
 - a. Among and between cultural organizations and creative individuals/artists to foster a greater exchange of ideas and opportunities for collaboration: 2.94
 - b. Among artists and potential employers of creative individuals: 2.3
 - c. Training for community-based residencies: 4.66
 - d. Training for school-based residencies: 5.84
 - e. Arts markets, exhibitions, showcases, gigs to promote work: 3.47
 - f. Opportunities to mentor: 5.78
 - g. Building a network of young emerging creative individuals/artists of every discipline: 4.8
7. Financial Investments to help creative individuals/artists (rank in order of importance) with 1 being highest value and 6 being least value.
 - a. Project funding: 1.97
 - b. Fellowships and commissions: 2.16
 - c. Community-based residencies with guidance and training to help me succeed: 4.28
 - d. School-based residencies with guidance and training to help me succeed: 5.34
 - e. Micro-loans (small loans to assist with business start-up or expansion): 5.19
 - f. Scholarships and stipends to enable me to participate in training or professional development opportunities in, or outside the region: 3.75

8. In order of importance, please rank the following indicating which areas you think ASC should pursue for future assistance to strengthen the cultural sector (rank order) with 1 being most important and 5 being least important

- a. Affordable housing for artists, scientists, historians, or scholars: 2.97
- b. Affordable studio space and work space for artists, scientists, historians or scholars: 1.59
- c. Affordable rehearsal space for performing artists: 2.75
- d. Affordable storage and construction space: 3.13

9. Other thoughts you would like to share. Answers open-ended; verbatim responses follow:

- a. I would love to see affordable studio space for visual artists' available as well as larger spaces to house organizations, 8,000 sq.ft. for example. Possibly an assistantship directory of people to assist artists with tech and marketing. THANKS!
- b. Promotion of the arts to the general public, how do we make art as fun as a NASCAR race or football game?
- c. There should be no "starving artists." We make money sporadically and unpredictably which means no matter how many years of experience or how developed your talent it appears it is all in whom you know, where you live and how much money you have or can be given. I'm willing to put my work in the "right" place with the right people at the right time if I could ever figure out how.
- d. Increasing appreciation and marketing opportunities for fine art, so people aren't buying framed posters for their McMansions. Helping artists create and maintain venues for sale or work.
- e. Continue to communicate with the artists. Find ways to help artists financially. Determine an easier approach to streamlining the grant application process. Use the Internet for all of the above! Thank you!
- f. As a full time artist, I want to spend time with other artists! Collaborations, collaborations, collaborations!
- g. I am grateful for the help that you give. It is vital to the life of the region.

h. Thank you ASC for asking Charlotte artists what they need. South Charlotte is such a popular area to live, we need studio space there. There are many artists who live in this area. Secondly, we should bring artists of merit to Charlotte to speak. Thank you again for the Special Projects Grant that brought Judy Chicago to Charlotte last year.

i. Anything that could be done to foster excellence, ambition and knowledge among the region's artists would be wonderful. All the facilities and funding in the world will not help if we are immersed in a culture of mediocrity. For a city of such wealth, populated by people from all over the country (and, increasingly, the world), the bar tends to be very low.

j. Showcase local artists in local papers to garner interest in Charlotte's creative community?

k. Health insurance.

l. I think the structure of this survey with the necessity to rank order these items is flawed.

m. Empower artists with money, access to real information, access to supporters and producers, and a network of resources designed to facilitate those who have dedicated their lives to enlivening the culture with provocative questions, progressive thought, and exquisite artistry.

n. Development of a cultural center that may meet some of these needs.

o. I think that individual artists need more assistance from ASC than the large organizations that get most of the monies. The large organizations have donors and sponsors and banks, etc. that sponsor their organizations in addition to ASC.

p. Most of the media in Charlotte focus on various dramatic efforts, the Symphony and performances at the Blumenthal, and the current rock scene. Charlotte has a vibrant jazz scene that doesn't get a lot of media attention. Also, more ASC folks need to get out of the office and attend local artistic happenings. I sometimes see ASC folks at my gigs but not often enough.

appendix e

STRATEGIC PLANNING PROCESS PARTICIPANTS

STRATEGIC PLAN OVERSIGHT COMMITTEE

DON TRUSLOW, CHAIR

MIKE ADAMS

MARY LOU BABB

GERALD JOHNSON*

MILTON JONES

MELISSA L'ORANGE

LINDA LOCKMAN-BROOKS

MARK MCGOLDRICK

BRUCE MCMILLEN

HARDIN MINOR*

ANNA SPANGLER NELSON*

ANGELES ORTEGA-MOORE

BILL PARMELEE

**Non-ASC Board member*

COMMUNICATIONS GROUP

MARY LOU BABB, *Chair, former Board Chair, The Mint Museum, ASC Board and Strategic Plan Oversight Committee*

DEBORAH BOSLEY, *Board member, The Light Factory Contemporary Museum of Photography & Film*

ANN DEPTA, *Board member, Chamber Music at St. Peter's*

TOM GABBARD, *President, NC Blumenthal Performing Arts Center*

BETH HARRELSON, *Board member, Charlotte Youth Ballet*

MARJORIE SERRALLES-RUSSELL, *Board member, McColl Center for Visual Art*

CHASE LAW, *Executive Director, Carolinas Concert Association*

WINN MADDREY, *Board member, The Mint Museum*

STEVE NEWMARK, *Board member, Carolina Raptor Center*

EMILY ZIMMERN, *President & CEO, Levine Museum of the New South*

MAJOR CULTURAL INSTITUTION TASK FORCE

MARY LOU BABB, *former Board Chair, The Mint Museum, ASC Board and Strategic Plan Oversight Committee*

LAURA BELCHER, *Sr. Vice President, Chief Financial and Operations Officer, ASC*

ROBERT BUSH, *Sr. Vice President, Cultural & Community Investment, ASC*

TOM EISELT, *Board Chair, Children's Theatre of Charlotte*

TOM GABBARD, *President, NC Blumenthal Performing Arts Center*

BEV HANCE, *Incoming Board Chair, The Mint Museum*

LEE KEESLER, *President & CEO, ASC*

LINDA LOCKMAN-BROOKS, *former Board Chair, Children's Theatre of Charlotte, ASC Board and Strategic Plan Oversight Committee*

MARK MCGOLDRICK, *ASC Board Chair*

BILL MORRISETT, *Board Chair, Discovery Place*

BILL PARMELEE, *former Board Chair, Charlotte Repertory Theatre, ASC Board and Strategic Plan Oversight Committee*

REGINA SMITH, *Vice President Grants & Services, ASC*

EMILY ZIMMERN, *President & CEO, Levine Museum of the New South*

CONSTITUENT MEETING PARTICIPANTS

John Alexander, *Artist*
Diane Althouse, *Executive Director, Historic Charlotte, Inc.*

R. Alan Barnhardt, *Executive Director, Carolina Raptor Center*

Lawrence Baxter, *Board Chair, McColl Center for Visual Art*

June Bayless, *Executive Director, Matthews Playhouse for the Performing Arts*

G. Deon Bradley, *President & CEO, Afro-American Cultural Center*

Charlene Bregier, *Artist*

Lon Lyle Bumgarner, *Artist*

Jay Butler, *Board Chair, Davidson Community Players*

Caroline Calouche, *Artist*

Kris Carmichael, *Chief Operating Officer, Charlotte Museum of History*

David Carroll, *Board Chair, The Mint Museum*

Richard C. Carter III, *Board Chairman, Carolina Raptor Center*

Mary Davis Ciminelli, *Marketing and PR Manager, Charlotte Philharmonic Orchestra*

John Clark, *Executive Director, Chamber Music at St. Peter's*

Steven Cohen, *Board Chair, The Light Factory Contemporary Museum of Photography & Film*

Martha Connerton, *Director, Martha Connerton/Kinetic Works*

Dr. David Cook, *Board Chair, Charlotte Civic Orchestra*

Deborah Cooper, *Executive Director, ArtsTeach*

David Dalton, *Board Chair, Festival in the Park, Inc.*

Adele Daniels, *Development Director, International House*

Marilyn Charlat Dix, *Artist*

Maryanne Dunn, *Director of Business Development, Garr Christian Academy*

Richard Early, *Executive Director, Charlotte Symphony*

David Edgar, *Artist*

Tom Eiselt, *Board Chair, Children's Theatre of Charlotte*

Tere Ey, *President, Wing Haven Foundation*

Karen Fesperman, *Board President, Creative Art Exchange*

Suzanne Fetscher, *President/CEO, McColl Center for Visual Art*

Tom Gabbard, *President, NC Blumenthal Performing Arts Center*

Jon Gates, *Executive Director, Historic Latta Plantation*

Charlotte Glassman, *Board President, Actor's Theatre of Charlotte*

Lisa Gray, *Executive Director, Charlotte Trolley*

Bill Griffin, *Chairman, Charlotte Philharmonic Orchestra*

Rebecca Griffin, *Executive Director, Mint Hill Historical Society*

Michelle Gurevitch, *Executive Director, Charlotte Civic Orchestra*

C. Wells Hall III, *Board Chair, Opera Carolina*

Catherine Hamilton-Genson, *Community Development Director, Lake Norman YMCA*

Bev Hance, *Board Chair Elect, The Mint Museum*

Beth Harrelson, *Board Chair, Charlotte Youth Ballet*

Robert Harrington, *Board Member, Levine Museum of the New South*

Steve Hershfield, *Board Member, Opera Carolina*

Rhonda Hollingsworth, *Special Events Coordinator, Town of Cornelius*

Emily Hopkins, *Executive Director, Children's Arts Project*

Deborah Hunter, *Executive Director, Historic Rosedale Plantation*

Courtenay Jackson, *Director of Development, The Mint Museum*

Jayson Johnston, *Special Events Manager, Town of Matthews and Executive Director, Matthews Alive! Inc.*

Marcie Kelso, *Executive Director, The Light Factory Contemporary Museum of Photography & Film*

Lawrence Kimbrough, *Board Chair, Historic Latta Plantation*

Andrew King, *Board President, Historic Rosedale Plantation*

Phil Kline, *Executive Director, The Mint Museum*

Gary Knox, *Mayor, Town of Cornelius*

Paul Kohut, *Chairman of the Board, Carolina Voices*

Nancy Kreidler, *Interim Director, Creative Art Exchange*

Bruce LaRowe, *Executive Director, Children's Theatre of Charlotte*

Chase Law, *Executive Director, Carolinas Concert Association*

Ron Law, *Executive Director, Theatre Charlotte*

John W. Love, Jr., *Artist*

Kate MacIntyre, *Executive Director, Downtown Davidson*

John Mackay, *President & CEO, Discovery Place, Inc.*

Sherry Malushizky, *Executive Director, Friends of the Arts at Davidson College*

Sue McDonald, *Administrative Director, Mint Hill Historical Society*

Loy McKeithen, *Board Chair, North Carolina Dance Theatre*

Chris McLeod, *Vice President, The Greater Charlotte Cultural Trust*

James Meena, *General Director & Principal Conductor, Opera Carolina*

Albert Moehring, *Executive Director, Charlotte Philharmonic Orchestra*

William Morrisett, *Board Chair, Discovery Place, Inc.*

Pidge Osborn, *President, Lake Norman Art League*

Richard Osborne, *Board Chairperson & Interim Executive Director, Charlotte Symphony*

David Page, *Board Member, Development Communications Chair, Community School of the Arts*

Beverly Penninger, *Artist*
Nancina Pope, *Managing Director, Charlotte Children's Choir*

Cindy Rice, *Executive Director, Davidson Community Players*

Anthony Roberts, *Town Manager, Town of Cornelius*

CONSTITUENT MEETING PARTICIPANTS - *continued*

Pam Royal, *Recreation Superintendent, Town of Huntersville*
Diane Ruggiero, *Director, Creative Art Exchange*
Amy Sanders, *Artist*
Barbara Schreiber, *Artist*
Donna Scott, *Artist*
Terry Scott, *Chief Financial Officer, Opera Carolina*
S. Mujeeb Shah-Khan, *Board President, Theatre Charlotte*
Dan Shoemaker, *Executive Artistic Director, Actor's Theatre of Charlotte*
Jeanette Sims, *Board Chair, ArtsTeach*
Doug Singleton, *Executive Director, North Carolina Dance Theatre*
Mary Davis Smart, *President & CEO, Charlotte Museum of History*
Sharon Smart, *Board Vice Chair, Charlotte Children's Choir*
Kathleen Smith, *Interim Director, ArtsTeach*
Michael Smith, *Chief Financial Officer, The Mint Museum*
Janet Starke Krogman, *Program & Grants Manager, ArtsTeach*
Dia Steiger, *Executive Director, Wing Haven Gardens & Bird Sanctuary*
Andrea Stevenson, *President & Executive Director, Community School of Arts*

Mindi Stoner, *Recreation Programs Coordinator, Town of Cornelius*
Anita Strauss-LaRowe, *Director of Strategic Planning, Charlotte Symphony*
Sharon Sullivan, *President, Charlotte Art League*
Terry Thirion, *Board Member, Charlotte Art League*
Greg Thompson, *Board Chair, Charlotte Children's Choir*
Eytan Uslan, *Artist*
Lal Vishin, *President, India Association of Charlotte*
Wilma Wales, *Board Vice President, Children's Arts Project*
Jim Warren, *Chief Operating Officer, Carolina Raptor Center*
Scott Warren, *Historic Site Manager II, President James K. Polk State Historic Site*
Van Weatherspoon, *Chair, Board of Trustees, Charlotte Museum of History*
Peggy Hudson Weston, *Artist*
Sue Wheldon, *Executive Director, Carolina Voices*
Alyson Young, *Artist*
Emily Zimmern, *President & CEO, Levine Museum of the New South*

INTERVIEWEES

MICHAEL BAKER, *past ASC Board leader*
TIM BELK, *CEO Belk Stores*
AMY BLUMENTHAL, *Owner, Alry Productions, former ASC Board Chair*
ROBERTA BOWMAN, *Vice President Sustainability and Community Affairs, Duke Energy*
TAD DICKSON, *CEO, Ruddick Corporation*
NED HARDISON, *Retired President, Charlotte Pipe & Foundry*
HARRY JONES, *Mecklenburg County Manager*
MILTON JONES, *Bank of America operating committee member*
MARSHALL LARSEN, *CEO, Goodrich Corporation*
TODD MANSFIELD, *Chairman & CEO, Crosland, Inc.*
MICHAEL MARSICANO, *President, Foundation For The Carolinas*
ANNA SPANGLER NELSON, *Chairman, C. D. Spangler Construction Co., past ASC Board leader*
TOM NELSON, *Chairman and CEO, National Gypsum*
PATRICK O'LEARY, *EVP Chief Financial Officer, SPX Corporation*
JIM PALERMO, *VP Johnson & Wales, former ASC Board Chair*
CYNDEE PATTERSON, *President, The Lee Institute, former ASC Board Chair*
DAN PRICKETT, *former ASC Board Chair*
GENE PRIDGEN, *Managing Director, Kennedy Covington*
PAT RILEY, *CEO, Allen Tate Company, former ASC Board Chair*
MIKE RIZER, *Wachovia Foundation Director*
TAMI SIMMONS, *Wachovia Corporate & Community Involvement Director*
MARCIA SIMON, *Owner, Paul Simon for Women, former ASC Board Chair*
CURT WALTON, *City Manager, City of Charlotte*

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AS OF 02.28.2008

LAURA BELCHER Senior Vice President, Chief Financial and Operations Officer	ZELDA KEITT Director of Pledge Administration
MARJORIE BRAY Development Officer	CHASE LAW Senior Development Officer
ROBERT BUSH Senior Vice President, Cultural & Community Investment	CATHY MCCANN Program Director
JOSEPH BUTLER Development Officer	PERNEICE MENDEZ Receptionist
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KATY GRAY Program Director, ASC North	HEATHER PONTONIO Program Assistant, Cultural & Community Investment
JEAN GREER Vice President of Public Art	REGINA SMITH Vice President of Grants & Services
SHAMEEKA HENDERSON Database Specialist	DAVID SNIDER Associate Vice President of Grants & Services
KRISTIN HILLS BRADBERRY Private Endowment Director	LORI TEMPLE Marketing, Communications & Development Assistant
PAUL HUNTER Senior Accountant & Technology Leader	KRISTA TERRELL Public Relations Specialist
LEE KEESLER President & CEO	PATRICIA ZODER Vice President, Annual Fund Drive

To build appreciation, participation
and support for the arts,
sciences, history and heritage
throughout Charlotte-Mecklenburg.



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