



# Case Studies Executive Summary

HERE

LONG WHARF THEATRE

Oregon  
Shakespeare  
Festival.

the rep

steppenwolf

Youth  
Speaks

THE  
THEATER  FFENSIVE

WOOLLY  
LAWM

Audience  Evolution

 Theatre  
Communications  
Group

# Audience (R)Evolution

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## INTRODUCTION

Developed by **Theatre Communications Group (TCG)**, with funding provided by the **Doris Duke Charitable Foundation**, the **Audience (R)Evolution Program** is designed to study, promote and support successful audience-engagement models in the not-for-profit professional theatre community. Round One of the program took place from 2012-15 and included four phases: Assessment, Learning Convening, Grants and Dissemination.

Early in Round One of program, TCG engaged **AMS Planning & Research**, a national arts management consulting firm, to provide research expertise for this project. For more than 25 years, AMS has been supporting the success of the arts and cultural sector through applied research and strategy development.

Through this assignment, AMS's goals were to:

- **Develop a shared vocabulary around audience engagement.**
- **Explore audience-engagement models and understand how/why the best work.**
- **Share these successful models with the field.**

For the purposes of this report, AMS defined "audience engagement" to include any effort by a theatre to connect to its constituency/ies, sometimes through multiple pathways, with a desire to enhance the experience they share.

## CASE STUDIES

As part of the research effort, AMS compiled data and prepared case studies on eight theatre companies that have incorporated audience engagement as a fundamental component of their service delivery and institutional mission. The companies were selected based on recommendations by TCG leadership, based, in part, on groups that were cited as "best practice" organizations by their peer companies. The theatres represent a variety of geographic locations and institutional sizes.

The eight participating theatres were:

- **Arkansas Repertory Theatre**, Little Rock, AR
- **HERE Arts Center**, New York, NY
- **Long Wharf Theatre**, New Haven, CT
- **Oregon Shakespeare Festival**, Ashland, OR
- **Steppenwolf Theatre Company**, Chicago, IL
- **The Theater Offensive**, Boston, MA
- **Woolly Mammoth Theatre Company**, Washington, DC
- **Youth Speaks**, San Francisco, CA

Some of these theatres have been TCG grant recipients; data associated with funded programs and their outcomes were included in the case studies when available, to supplement the data AMS collected.

AMS's research focused on understanding "success" for the theatres' audience-engagement efforts and comprehending the journey and outcome of their efforts. The case studies tell the organizations' stories by way of institutional insight, qualitative and quantitative data, and personal perspective. In addition, the case studies sought to explore such questions as: How do the theatres measure success? What practices can be replicated by other organizations in the field? What specific challenges and obstacles did the theatres face, and how can TCG, funders and others help overcome them?

The process included an initial round of 58 interviews conducted in 2012-13. In order to receive a diversity of input, AMS interviewed at least three staff personnel at each company, including one or more artistic leaders, a primary implementer of the company's audience-engagement program(s) and one additional staff person involved in audience-engagement efforts. AMS also spoke with theatre board members and others who could provide firsthand feedback on audience-engagement efforts. Audience members and program partners also provided input.

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TCG staff conducted a follow-up round of interviews in the spring of 2015, speaking with many of the original participants, and, in some cases, additional theatre staffers.

AMS asked interviewees to share information on specific audience-engagement strategies and the programs attached to them. They talked about the organizations' commitment to audience-engagement efforts and the degree to which their company's organizational structure helped with program design, implementation and evaluation. Interviewees shared the goals they hoped to achieve through these programs/activities; discussed program strategy selection, design implementation and impact; and described the outcome(s) they were planning for. The interviews also provided insight regarding measures of success, challenges, successful programs/efforts that have been replicated and lessons learned.

This research represents a snapshot view of strategies at the eight institutions profiled during the period of the study. Given the rapid pace of cultural change, especially surrounding online activity and social media, it is important to note that some programs that the theatres saw as pioneering at the time are now widespread. Furthermore, there has been a substantial degree of turnover among theatre personnel, and many individuals quoted in the case studies have since changed jobs. Nonetheless, the case studies contain many useful insights that continue to resonate for the field, changing circumstances notwithstanding.

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## UNDERLYING ASSUMPTIONS

AMS began this research by articulating a four-step "Framework for Success" that it applied to audience-engagement initiatives. In conducting case study interviews, AMS assessed to what degree theatres' efforts aligned with this framework.

The framework includes:

- **IDENTIFY** the desired outcome(s).
- **PLAN** project approach(es).
- **EXECUTE** the project(s).
- **MEASURE** the success of the project(s).

In addition, AMS defined five Audience-Engagement Strategy Clusters early in the research process. Based on an extensive literature review, these clusters were designed to articulate an organizational framework for the theatres' tactics; support more productive collaboration within the community by highlighting commonalities among diverse organizations; and suggest underexplored approaches. The five AMS Audience-Engagement Strategy Clusters are:

### 1. SEGMENT Strategies

Defining and refining the intended **people** to be served by the institution's work.  
Examples: Focusing by age, ethnicity, geography, participation preference, etc.

### 2. VENUE/PATH Strategies

Rethinking the **place** people engage with the organization's work, and the **road** they follow to find it.  
Examples: Performing in nontraditional venues; offsite programing; delivering content via web, new media and social media channels.

### 3. RELATIONSHIP Strategies

Building or enhancing the **personal relationships** the organization has with its communities.  
Examples: Pre- or post-performance conversations with creative teams; community liaisons; concierge services; feedback collection; focus groups.

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#### 4. INCOME Strategies

Redesigning the **financial exchange**: who pays, how much, for what, for whom.

Examples: Rush tickets; premium services; all-access monthly subscriptions; sponsored tickets.

#### 5. CONTENT Strategies

Doing **different work**, rather than doing current work differently.

Examples: Audience participation in the artistic process of developing new works; performances that solicit/encourage audience participation; substantial educational offerings.

The case studies matched specific tactics to each of these strategies. However, over the course of the study, it became clear that many tactics supported two (or more) strategies to various degrees.

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## MAJOR FINDINGS/LESSONS LEARNED

AMS identified a number of key findings that grew out of the findings detailed in the case studies. These include:

Audience-engagement strategies work best when **engagement is central to the theatre's mission**. They require substantial institutional commitment, and are most successful when the engagement efforts are strategically linked to the company's artistic work. Ideally, there is equal emphasis on the quality of the work and on the quality of the experience for the theatre's constituents.

**Across-the-board organizational buy-in** plays a key role in successful audience-engagement efforts. Ideally, institutional commitment starts at the top and includes collaboration among all engaged parties, clearly designed strategies and support from the theatre's board.

Likewise, partnership **buy-in from external collaborators** is important. This can be achieved, in part, by clearly defining the benefit the partner receives by participating, as well as what the theatre hopes to get out of the partnership.

Some theatres **take on a "civic leadership" role** by, for example, leading the conversation and providing space for dialogue (both inside and outside of the theatre) on topics of community interest. These areas for discourse may, or may not, have a direct connection to what's playing on the stage.

**Technology plays an increasingly important role** as a means for informing and engaging constituents. Social media is providing new and innovative tools to help theatres connect with large masses of people and/or to engage more deeply with smaller, more focused groups.

Many successful programs **give members of the community direct access to creative personnel**, including actors, directors, writers and others.

As is the case in many areas of the field, **more resources are needed**—money, time and the right people in the right positions. In particular, organizations need more staff charged specially with focusing on this particular task.

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## KEY QUESTIONS AND AREAS OF STUDY

### HOW DOES ONE DEFINE AUDIENCE ENGAGEMENT?

How to define audience engagement is part of an ongoing discussion, and language surrounding this topic continues to mean different things to different individuals and in different contexts. Examples of activity that may be included under the umbrella of audience engagement include outreach efforts, education programs, enrichment programming and community engagement, to name but a few. Theatres are diverse in their definitions of, approaches to and embrace of audience-engagement efforts; not surprisingly, outcomes differ widely from company to company.

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#### HOW WILL YOU KNOW YOU'RE SUCCESSFUL?

AMS contends that the field would benefit greatly from theatres having a more clearly defined means to measure the success of audience-engagement efforts on more than an anecdotal basis. Metrics to define the success of relational (vs. transactional) efforts are elusive. Hard data are difficult to come by. Furthermore, at some companies, personnel worry that determining precise outcomes during their planning and implementation process can stifle creativity. How can theatres remain creative and also create and adhere to designed metrics systems that will best serve the institution, in both the short and long runs?

#### SOCIAL MEDIA MANIA

For many theatres, robust social media activity has long since become a "must do," rather than an option. It is a business tool that increasingly brings creative and innovative engagement strategies to the fore. In addition to serving as a medium for sharing information, the opportunity to connect with constituents in real time has opened vast new possibilities in the past few years. Anecdotal evidence suggests that many audience members have come to expect to be engaged beyond sitting in the theatre and watching a production.

#### EXPLORING THE POSSIBILITIES

The state of the field is one of exploration. Experimentation tends to be in the forefront as theatres try out new programs and activities geared toward more actively engaging audience members. While activities like postshow discussions are still a beneficial way to hear what audiences have to say and to deepen their connection with the work presented onstage, theatres are actively exploring other activities that are literally hands-on experiences, as well as migrating, replicating and/or reconceiving them online and through social media.

#### CASE STUDY EXAMPLES/WHAT'S WORKING

Through the case study work, AMS has documented audience-engagement intent and impact at the participating theatres. In addition to describing specific programs, the case studies explore actions taken and lessons learned that others in the field can glean insight from. This includes challenges as well as successes, and small ideas as well as big ones. They also explore the organizational support behind various strategies and how partner organizations were involved.

The case studies offer detailed descriptions of many successful practices that came to light within the research. Several representative examples follow.

#### DEEP ORGANIZATIONAL COMMITMENT TO AUDIENCE ENGAGEMENT

##### Woolly Mammoth: Connectivity as a Core Principle

Having identified "Connectivity" as a major strategy for audience engagement, Woolly Mammoth Theatre Company (WMTC) has devoted a considerable amount of effort to developing theme-based interactive activities tied to its programming and creating initiatives to work with a number of community partners. These efforts were aimed at expanding its audience within particular demographics as well as expanding beyond those demographics.

WMTC has articulated three core principles associated with Connectivity:

- **Audience Composition/Audience Design:** This must be addressed with the same presence of thought as the technical aspects of a show.
- **Total Audience Experience:** How do you look at every step of the audience's involvement from the first time they hear about the show until they leave the theatre, and perhaps even after that? What are the various opportunities for engagement?
- **Points of Entry:** What core questions does the play raise that will be compelling for members of the community and create linkages to new constituencies?

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The theatre's commitment to Connectivity included creating an organizational structure that supports the institution's objectives and committing the necessary resources. This included the hiring of a Connectivity Director, who focuses, with the assistance of other staff members, on developing and implementing audience-engagement programs and activities.

#### **Oregon Shakespeare Festival: An Audience Development Manifesto**

Oregon Shakespeare Festival's commitment to diversity and inclusion served as a consistent goal throughout its audience-engagement strategies. The theatre articulated a set of guiding principles surrounding diversity in an *Audience Development Manifesto*, created in the spring of 2010. It reads, in part,

*OSF invites and welcomes everyone. We believe the inclusion of diverse people, ideas, cultures and traditions enriches both our insights into the work we present onstage and our relationships with each other. We are committed to diversity in all areas of our work and in our audiences.*

Four specific areas of focus for audience development highlighted in the document have become the touchpoints for specific goals and tactics: socioeconomic diversity, age diversity, increasing access for people with disabilities and racial and ethnic diversity.

The case study examines several OSF initiatives that advanced the vision of the *Manifesto*. Among them are Cultural Connections programs, through which the company welcomed and supported diverse audiences throughout every season. The Cultural Connections Education Exchange (CCEE), developed in collaboration with the Migrant Education Program of the Southern Oregon Education Service District, exposed students from underrepresented cultural groups to Shakespeare and theatre in general. It involved multiple school visits by OSF's actor-teachers, followed by students attending an OSF production. One of the CCEE's goals was to get the students to come back to the theatre with a friend or relative, and at the end of the program, each student received a "Pass +1" admitting them with a guest to another show. The overarching model was to merge a community organizing approach with a sales approach.

#### **UNLOCKING THE POWER OF SOCIAL MEDIA AND TECHNOLOGY**

##### **The Theater Offensive: Online Play**

Having noted that young audience members are increasingly connected via social media and are attracted to the sense of community and connection those media provide, The Theater Offensive (TTO) employed gamification strategies to augment and enhance audience engagement. Use of social media allowed the company to be creative and have fun while increasing opportunity for interaction and, in some cases, raising money. Coming up with gamification ideas was a staff collaborative effort targeting teens through those in their early forties.

One example: A supporter contacted TTO and said that he was not able to make a cash donation, but offered instead to donate tickets to a Red Sox game. TTO created a contest that encouraged supporters to make donations that would result in their names being included in a drawing. The winner received the baseball tickets. The contest was promoted via Facebook, Twitter and email. In a two-hour time frame, TTO raised \$1,000. Staff reported that by competing for incentives in the contest, supporters felt valued as active participants in the organization.

##### **HERE Arts Center: Video Feedback Goes Online**

One of the strategies HERE identified was to build online and on-site opportunities simultaneously. A successful example was the company's "5 for 5" video project. At certain performances during the first week of a show's run, staff prompted five patrons to speak on camera about the production they had just seen. Five-minute postshow interviews conducted in the lobby immediately after performances offered varying sets of prompts and questions along these lines:

- **Share five adjectives to describe the show.**
- **Where did your imagination take you while watching the show?**
- **How would you describe the show to someone?**

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HERE used these videos to as a tool to promote shows on its website, in social media and through email communications. The project was designed to engage potential audience members by connecting them with responses from experienced HERE patrons. The videos also generated excitement on-site, as onlookers watched fellow audience members being interviewed.

#### **DIRECT ACCESS TO ARTISTS AND THE ARTISTIC PROCESS**

##### **Long Wharf Theatre: SPARKing Connections**

Long Wharf Theatre (LWT) gave community members direct access to artists through the SPARK program, which engaged a group of up to 50 interested theatregoers through all of the stages of the new-play development process, from workshop to opening night. Members of this group participated in four 90-minute dialogues per production and received a copy of the script to review. Membership was diverse and has included board members, subscribers, high school students, critics, teachers and others. Members pay a fee of \$25.

SPARK involved one new show per season, with a focus on a different facet of the production process in each round. The dialogue in the season's four gatherings covered topics relevant to both the production at hand and to the art of making theatre. LWT staff didn't try to hide anything from the group; when things were going well, participants saw it firsthand. Conversely, when challenges occurred during production, they experienced this aspect of theatre as well.

##### **Arkansas Rep: *It Happened in Little Rock***

The Rep has embarked on several efforts to directly involve audience members in the creation and production of works for its stages. One example from 2007 involved *It Happened in Little Rock*, a play about the desegregation of Little Rock Central High School during the Civil Rights Movement, written and directed by Rajendra Ramoon Maharaj using text from oral histories gathered from the Little Rock community.

Maharaj wanted to engage the audience in the creation of work—something that had never been done at The Rep. Local residents were interviewed for the show, which generated source material for the script. Approximately 50 interviewees were written into the script as characters. By engaging members of the community in the collection of their stories, the interviewees shared investment in the project. That paid off as they became excited to spread word about the work.

#### **EXPANDING THE THEATREGOING EXPERIENCE**

##### **Woolly Mammoth: "Pinspiration"**

A particularly successful effort to use technology as a means to extend and enhance the theatregoing experience was a program the theatre called "Pinspiration" at Woolly Mammoth Theatre Company. The theatre's Connectivity department set out to more fully engage patrons around the theatre's presentation of Second City's *America All Better!!* Through an interactive lobby experience, funded partly by a TCG **Audience (R)Evolution** grant, WMTC invited audience members to "vote" on the state of American society via texts and tweets. The polling results were displayed in real time in the lobby after the show, and audience members received tailor-made infographics in their postshow emails, based on responses from their fellow attendees. WMTC also pinned colorful infographics to its Pinterest page and allowed audiences to compare what they believe is true with what is actually "true" either online or in the lobby via a touchscreen display.

##### **Steppenwolf: Reinventing the Postshow Discussion**

Seeing itself as a "Public Square," Steppenwolf uses its work onstage to drive important civic discourse. The theatre's staff wanted to be more intentional about creating a community conversation around its productions, especially new work. Like many theatres, Steppenwolf regularly uses postshow discussions as a vehicle for interacting with audiences. However, its approach has evolved over time to something more than the traditional question-and-answer format, and the number of postshow discussions increased from weekly to nightly, with discussions following each and every performance at the theatre.

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The theatre developed a comprehensive program to manage these discussions. Staff training included moderator “boot camps” in facilitating conversations in a way that sparks dialogue among audience members, rather than with the moderator. The discussions thus took an interactive focus, giving audience members the opportunity to speak to one another about what they took away from the show. Staff were careful not to tell audiences what they should talk about. Instead, they put patrons in the driver’s seat to grapple with what new work means, often beginning with questions intended to activate audience members’ personal experience of the show.

#### **STRATEGIC PARTNERSHIPS**

##### **Youth Speaks: Brave New Voices**

The annual Brave New Voices International Youth Poetry Slam Festival (BNV) takes place over five days each summer in a different city, supported by a network of organizations and powered by Youth Speaks. To support the project, Youth Speaks has generated strong partnerships between diverse and underserved communities, green action agencies, local community groups, urban environment activists and the contemporary arts world. The festival invites young people to take part in as many as 30 workshops and 50 events, with more than 500 young writers in attendance.

Local partners keep the festival relevant in their communities. The organization has developed how-to models for others that can be adaptively implemented in the right context for their community. Youth Speaks authored a template for BNV which provides a structural frame for partners, anchoring the festival with a theme; capacity-building workshops; and pillar events. Partners helped to choose venues, organize local street teams and staff filmmakers, production teams and local teaching artists.

Youth Speaks has taken a leadership role in Brave New Voices by way of the following:

- **Providing an online fundraising strategy and portal;**
- **Disseminating pedagogy at Brave New Voices festivals during sessions designed for organizational leadership;**
- **Community-building through participation in the arts (40 events over five days);**
- **Providing strategic-planning workshops;**
- **Ongoing surveys via an online portal to gauge success.**

##### **Arkansas Rep: Affinity Events with Local Businesses**

One of The Rep’s goals is to encourage people to think of the theatre as a destination—a place to have an enjoyable social experience and to be with friends and learn. The Rep aims to develop ownership of the theatre among constituencies and to increase positive responses and word-of-mouth. To that end, The Rep reached out to local businesses to collaborate on preshow affinity events. Examples of successful events included a “girls’ night out” shopping experience with local vendors; family days with local organizations, such as *Little Rock Family* magazine; a hair event in conjunction with a production of *Hairspray*; and a partnership with the Humane Society that brought its mobile adoption unit on-site during a production of *Winn-Dixie*.

Affinity events were intended as enjoyable experiences for people who might not otherwise have a habit of going to the theatre. They minimized any sense of unfamiliarity or intimidation for new audiences. “We want people to have an enhanced experience that goes beyond the transactional,” said Angel Galloway, Director of Communications and Marketing. “Some people don’t want to go behind the scenes. They just want to have an enjoyable time—a social experience.”

While the program began as a ticket-selling initiative (and has been successful in that respect), The Rep’s goal expanded to include building community. According to Galloway, affinity events help The Rep create and expand connections with local businesses. In addition, this work has had significant institutional impact—what Galloway describes as a deeper internal focus on patron experiences and customer service.

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#### SUCCESSSES

Generally speaking, theatres' endeavors tended to be most successful when they shared one or more of the following characteristics:

**All aspects of the system were aligned.** Staff buy-in extended to the entire organization across various departments; successful programs often incorporated input/feedback from staff, board, artists and patrons.

**Marketing efforts were diverse,** especially moving beyond the traditional to include social media.

**The theatre made the community feel welcome** in a very hands-on way and removed barriers to participation.

**The theatre committed the resources necessary** (time/people/money) to the work at hand. While this was often not possible, it played an essential role in providing the means to a successful end.

**Board support was critical,** especially for programs that required risk-taking, long cultivation periods and increased financial resources.

**Programs had enough time to "root."** Results are typically not immediate, and sufficient time to determine how well a program is (or is not) doing yielded more successful results.

**The effort was very clearly connected to the outcome** that the theatre was working toward.

#### CHALLENGES

While each of the eight theatres studied for the **Audience (R)Evolution Program** experienced much success, challenges were present as well. A number of issues arose from the reports, including:

**Lack of adequate resources.** Audience-engagement efforts absorb time and money. Given the pressures facing already underresourced institutions, it is hardly surprising that companies struggle to find necessary funding and staff time. This was a consistent theme throughout the case studies, for both small institutions and large ones.

**Negotiating the perceived value of work that takes place outside theatrical production.** Some theatres have faced questions from staff, boards and others about whether the effort required to create engagement programs is sapping resources from other elements of core work.

**Overcoming internal cultural barriers.** As with any kind of innovation, the introduction of certain engagement activities met with resistance. For example, when the creation of video content for social media occurred amid rehearsals at one theatre, the company had to carefully manage the perceived intrusion of video into the artistic process.

**The need to build trust among artists, outside partners and other collaborators.** This often required more time and effort than expected. Mismatched expectations sometimes led to problems, which might be prevented by an investment in defining relationships and responsibilities up front.

**The iterative nature of digital work.** "We are constantly adjusting," said a staffer at Steppenwolf, "and nothing is ever finished because the audience changes. That's the whole promise of digital to audiences, and it poses challenges to our workflows every day."

**Being boxed into traditional outcome-based measures that are inherently transactional.** Knowing how to evaluate, determine and communicate success was a struggle. There has to be constant vigilance around impact—often without having obvious measures to determine success.

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### MEASURING SUCCESS

A key concern for AMS was the lack of resources that would allow theatres to commit adequate time, staffing and funds to developing and implementing the strategies tied to audience-engagement programs. Furthermore, in most cases, the effort applied to creating programs was not matched by an effort to systematically determine the preferred outcomes of the projects beyond attendance figures, or to measure their success; there were scant resources available to assess why they met or failed to meet their goals, initially or over time. AMS describes the paucity of data theatres had available to share as “alarming.”

Theatres were not alone in this regard. AMS has identified this as a systemic challenge for arts organizations. According to a 2014 survey by the Nonprofit Finance Fund, a community-development financial institution, arts organizations are significantly less likely to regularly collect long-term data on impact than the nonprofit sector as a whole.<sup>1</sup>

While theatres were well-equipped to track audience numbers and were starting to measure social media interaction, much of the other feedback obtained was anecdotal. AMS urges theatres to apply the same dedication that is currently available for strategy/program design to determining criteria of success for the endeavor. Theatres can glean valuable insights from both successful and less-than-successful initiatives. They can learn what might be done differently in the future and build upon past achievement.

### CONCLUSION

AMS considered the theatres' audience-engagement initiatives especially important in light of a reported overall decline in attendance figures for the arts generally, as measured by the National Endowment for the Arts through its Survey of Public Participation in the Arts.

There is no shortage of creative ideas, hard-working administrators, skilled artists, dedicated board members and enthusiastic constituency members. The lack of resources necessary to bring a seed of an idea into full bloom—not just planning and executing, but also defining desired outcomes and measuring success—is deeply felt.

To paraphrase one voice collected in the case studies, a successful organization must be as rigorous about audience engagement as it is about artistic work. Strategic-thinking theatres are considering how their audience-engagement efforts fit into the framework of their missions. They are aware of the pitfalls that come with making assumptions about their audiences; they are communicating with their constituencies regarding how they want to join in the experience of attending theatre, sharing in its creation, engaging with the ideas presented onstage, and participating in civic discourse surrounding shared or conflicting values. They are dedicated to providing a spectrum of opportunity for participation. While defining and measuring success continues to present a challenge, theatres are beginning to amass best practices and shared learning from which they and others in the field can benefit.

These case studies demonstrate that institutional theatres are planning, creating and implementing successful audience-engagement programs. The theatres view audience engagement as a core institutional priority worthy of extensive organizational commitment. Through powerful use of social media, creating direct connections between audiences/constituents and artists, and the many other strategies described in the case studies, theatres are deepening their connection to patrons and other constituency members by educating, entertaining and ultimately retaining them, as well as expanding their audience bases.

<sup>1</sup> <http://nonprofitfinancefund.org/announcements/2014/state-of-the-nonprofit-sector-survey>

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For more information on TCG's **Audience (R)Evolution Program** please contact [AudienceRev@tcg.org](mailto:AudienceRev@tcg.org) or visit [www.tcg.org](http://www.tcg.org).

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