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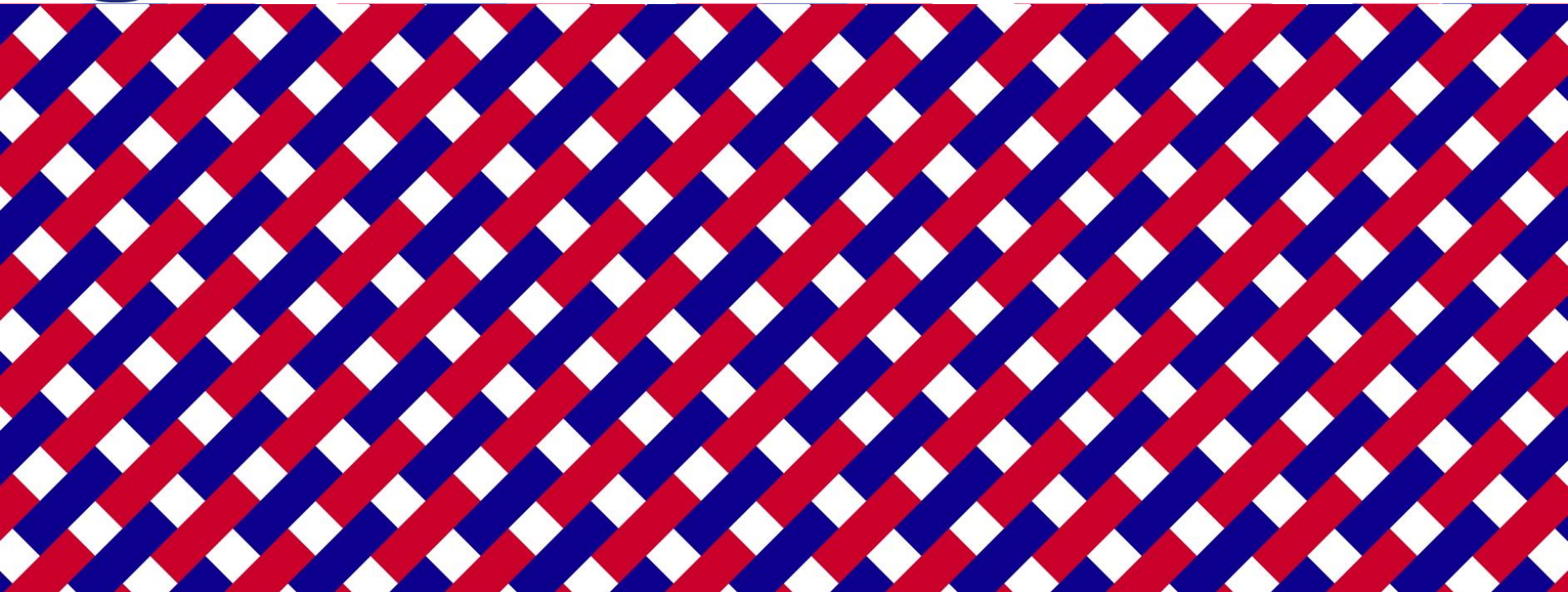
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building creativity

March 2017

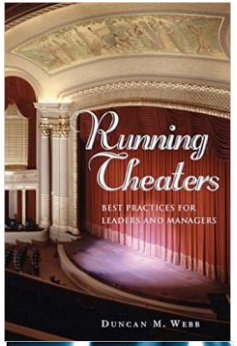
Council Presentation: Performing Arts Facility Needs Assessment

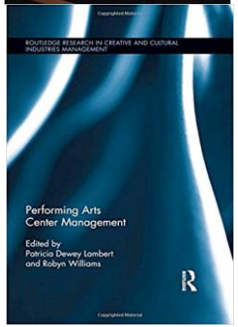
Completed for The City of Plano

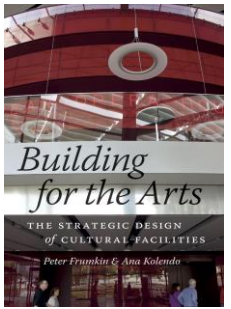


Webb Management Services

- Webb Management Services, Inc. is a management consulting practice for the development and operation of arts and cultural facilities. We work for governments, schools, developers, and arts organizations on facility feasibility, business planning, and strategic planning. Our practice was founded in 1997, and we recently started our 380th assignment.
- We conducted the feasibility study for Plano's Courtyard Theater in 1999 and for the Collin County Performing Arts Center in 2002. Other recent projects in Texas include a needs assessment for new facilities at TCU, the Dallas Arts District Business Plan, and the Buddy Holly Performing Arts Center feasibility study in Lubbock.
- Duncan Webb authored *Running Theaters* in 2005, a best practices guide to the operation of multi-user performing arts facilities in North America. Since 2014, he has been a regular contributor to the Clyde Fitch Report.







Assessment methodology

- Our assessment of needs considers the case for facilities in terms of audience demand, user demand, the existing supply of facilities, and how such a project supports the broader goals of the community and the region.
- To complete the assessment we:
  - Interviewed a cross-section of cultural, political, and community leaders;
  - Toured and assessed local and regional cultural facilities;
  - Studied the size and characteristics of the market area (including full-time and part-time residents, as well as short-term visitors);
  - Assessed user demand for new or improved facilities; and,
  - Identified the potential benefits and impacts that additional cultural facilities could have on Plano and the region.

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Forces & trends

- The bad news:
  - Declining audiences for the traditional performing and visual arts.
  - Political and economic challenges for direct funding of the arts by government.
  - Competition for private-sector funding.
  - The fragility of the nonprofit arts sector.
- The good news:
  - Increasing active arts participation.
  - Sector-driven education and outreach programs.
  - The improving value proposition.

Facilities responding to changes

- Arts facilities are responding to these challenges and opportunities, as follows:
  - By embracing a broader definition of cultural activity that reflects the diversity, heritage, and creativity of all people.
  - By shifting from “Friday Night Lights” to the idea of a community living room.
  - By moving from cultural palaces to cultural districts.
  - By placing new focus on active programs.
  - By putting greater focus on the social experience of attending an event.
  - By finding ways to maintain a low cost of access for nonprofit arts groups.
  - Through the addition of secondary, temporary, and outdoor spaces.
  - By providing audiences with some measure of control over their experience.

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Defining the market: market segments

Market Segment 1:

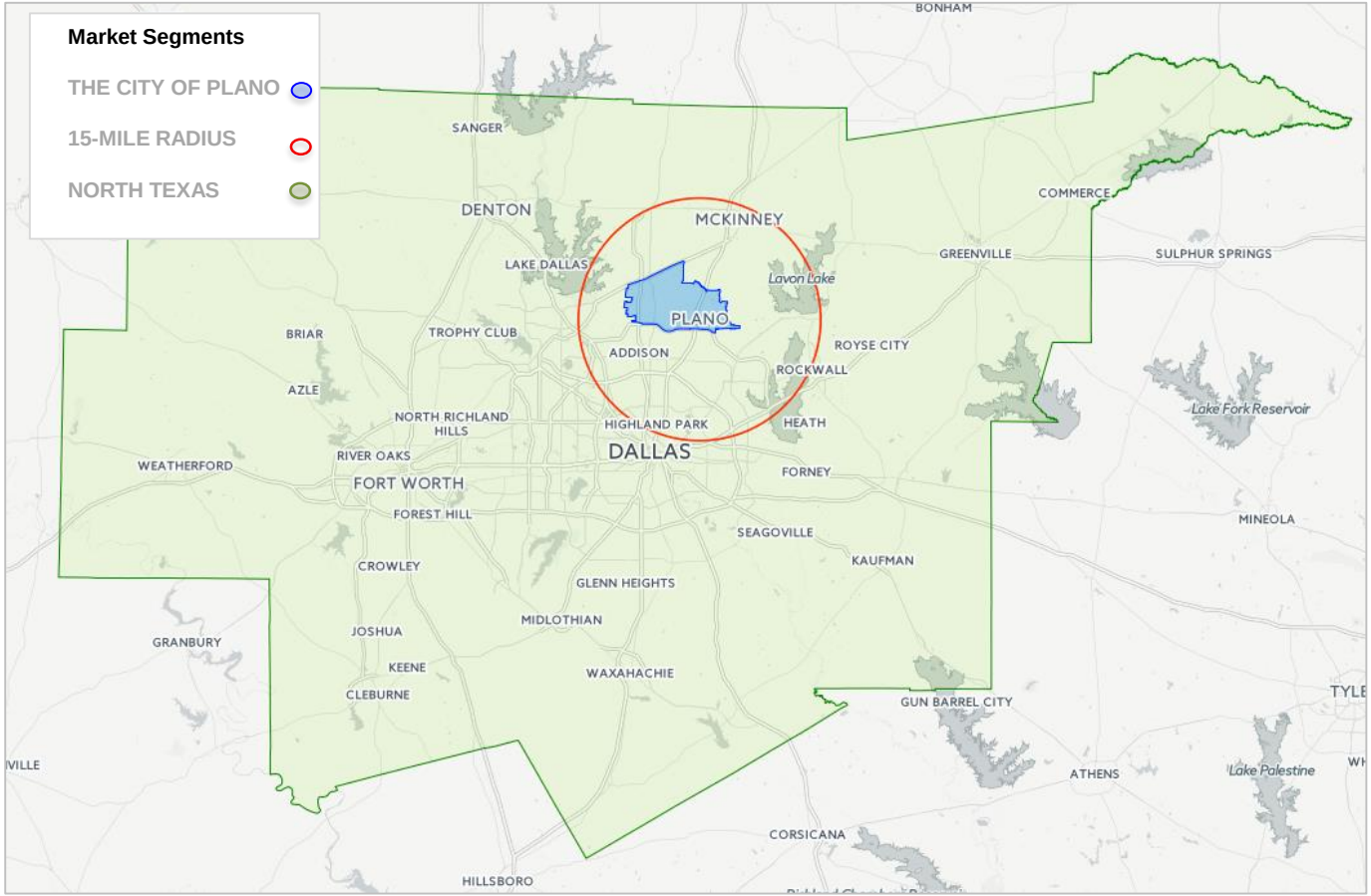
The City of Plano

Market Segment 2:

A 15-mile radius around the Courtyard + Cox

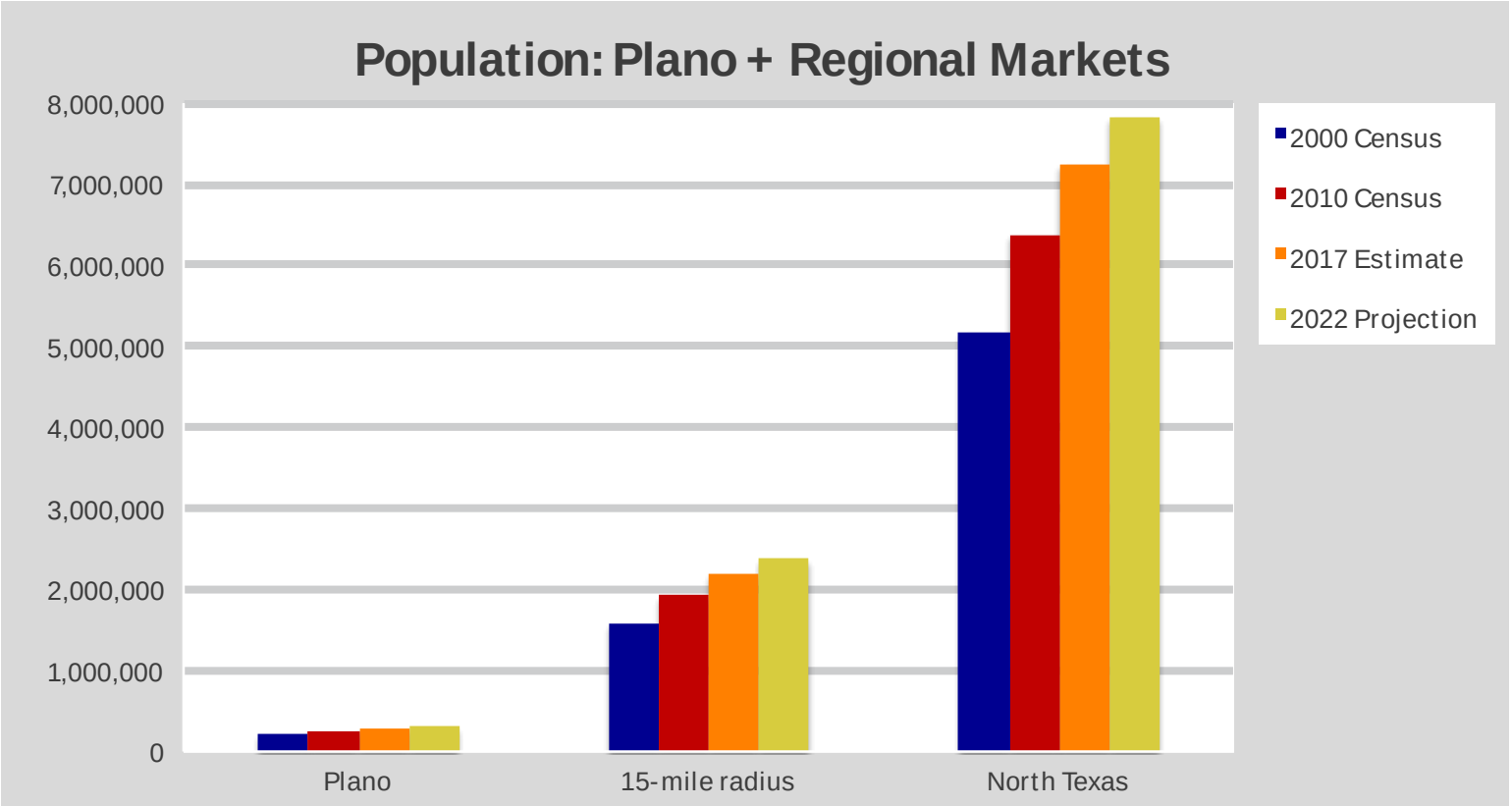
Market Segment 3:

The North Texas Region

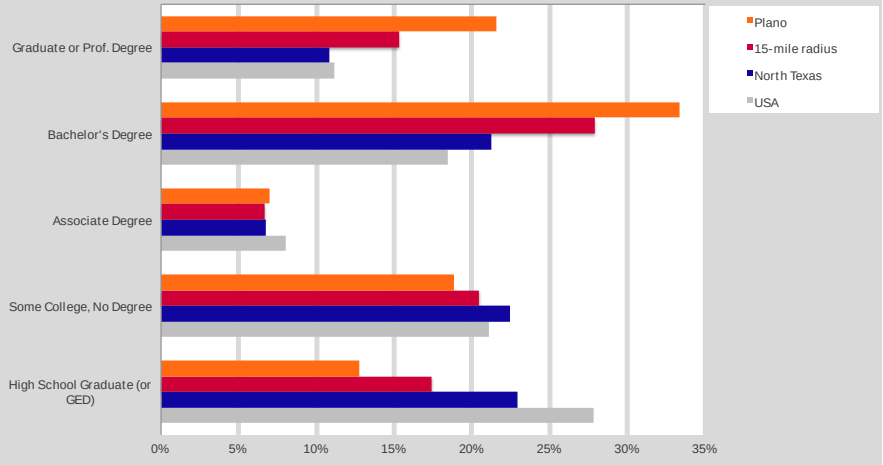


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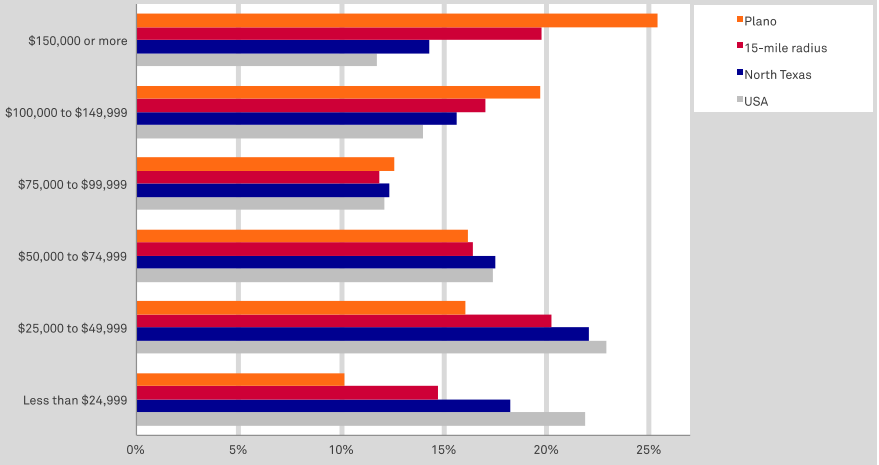
Market size and growth



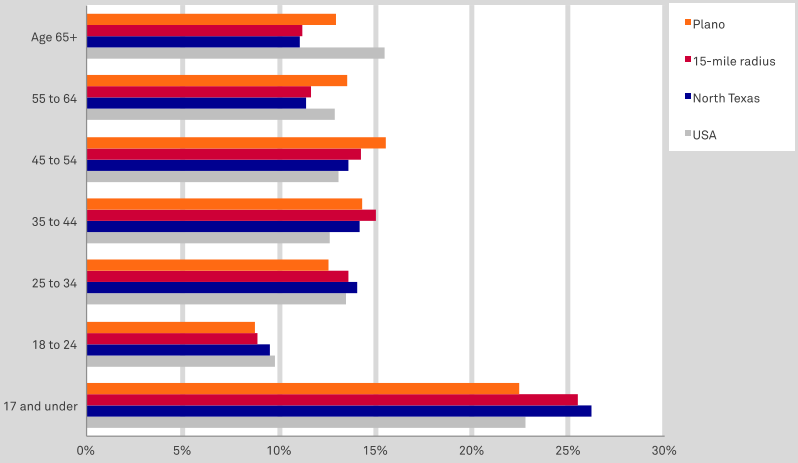
Educational Attainment



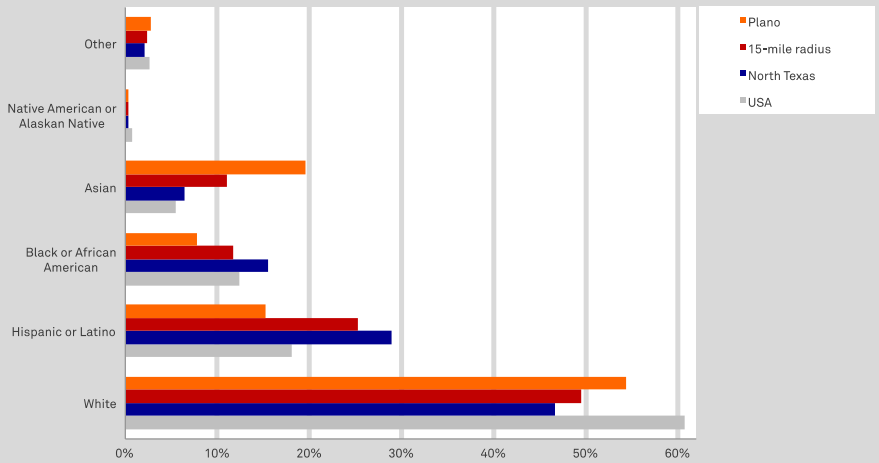
Household Income Distribution



Age Distribution



Race + Ethnicity



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Market conclusions

- The market for new cultural facilities is large and growing quickly.
- All three market segments are diverse in age; however, the size of the ‘17 and under’ population in each market segment indicates that there are a significant number of families.
- The Plano and 15-mile radius populations are both well educated and affluent, indicating propensity to support the arts. The North Texas Region is varied, although it too has educational attainment and household income levels that exceed national numbers.
- The market is also diverse. In particular, there are large Asian and Hispanic or Latino populations that speak languages other than English at home (Spanish, Chinese, Urdu, Hindi, and so on).
- Visitors to Plano are well-educated and affluent. They travel to Plano for business, to go to conferences, or to attend sporting events. This last cohort is of particular interest, as our experience in other sports-tourism markets indicates that these visitors often seek out things to do in the evenings and between matches.
- According to State data, visitors to Collin County in 2015 spent $1.2 million on arts, entertainment, and recreation.
- Finally, data from Americans for the Arts indicates that cultural participation in Collin County is high despite Collin County having fewer nonprofit organizations and creative businesses per 100,000 population when compared to the Median and Average County Indicator Values.

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User demand

User Demand for Additional Plano Performance Facilities	Days				Capacity		
	Performances	Rehearsals /Tech	Other	Total	Low Capacity	Ideal Capacity	High Capacity
Plano Symphony Orchestra	8	8	-	16	1,700	1,800	1,900
Chamberlain Performing Arts	10	18	-	28	750	1,625	2,500
North Texas Performing Arts	-	-	1	1	-	1,500	1,800
Plano Community Band	4	4	6	14	500	1,050	1,600
Dallas Asian American Youth Orchestra	2	2	-	4	-	700	-
Plano Metropolitan Ballet	12	3	2	17	325	650	700
City of Plano: Marketing + Community Engagement	2	4	3	9	450	550	750
Plano Civic Chorus	6	-	-	6	-	500	-
This Side UP! Family	-	-	25	25	100	350	500
Brick Road Theatre	12	6	-	18	-	350	-
The Art Centre Theatre	30	150	150	330	200	300	500
MYO Youth Theatre	12	40	-	52	75	200	250
Astraios Chamber Music	15	30	-	45	50	175	300
Repertory Company Theatre	24	12	-	36	-	150	250
Total	137	277	187	601	-	-	-

User Demand Summary: Performance Facilities (14 Users)	Performances	Rehearsals /Tech	Other	Total
Fewer than 500 seats (6 users)	93	238	175	506
500 to 1,000 seats (4 users)	22	9	5	36
1,001 to 2,000 seats (4 users)	22	30	7	59
Total Days of Use:	137	277	187	601

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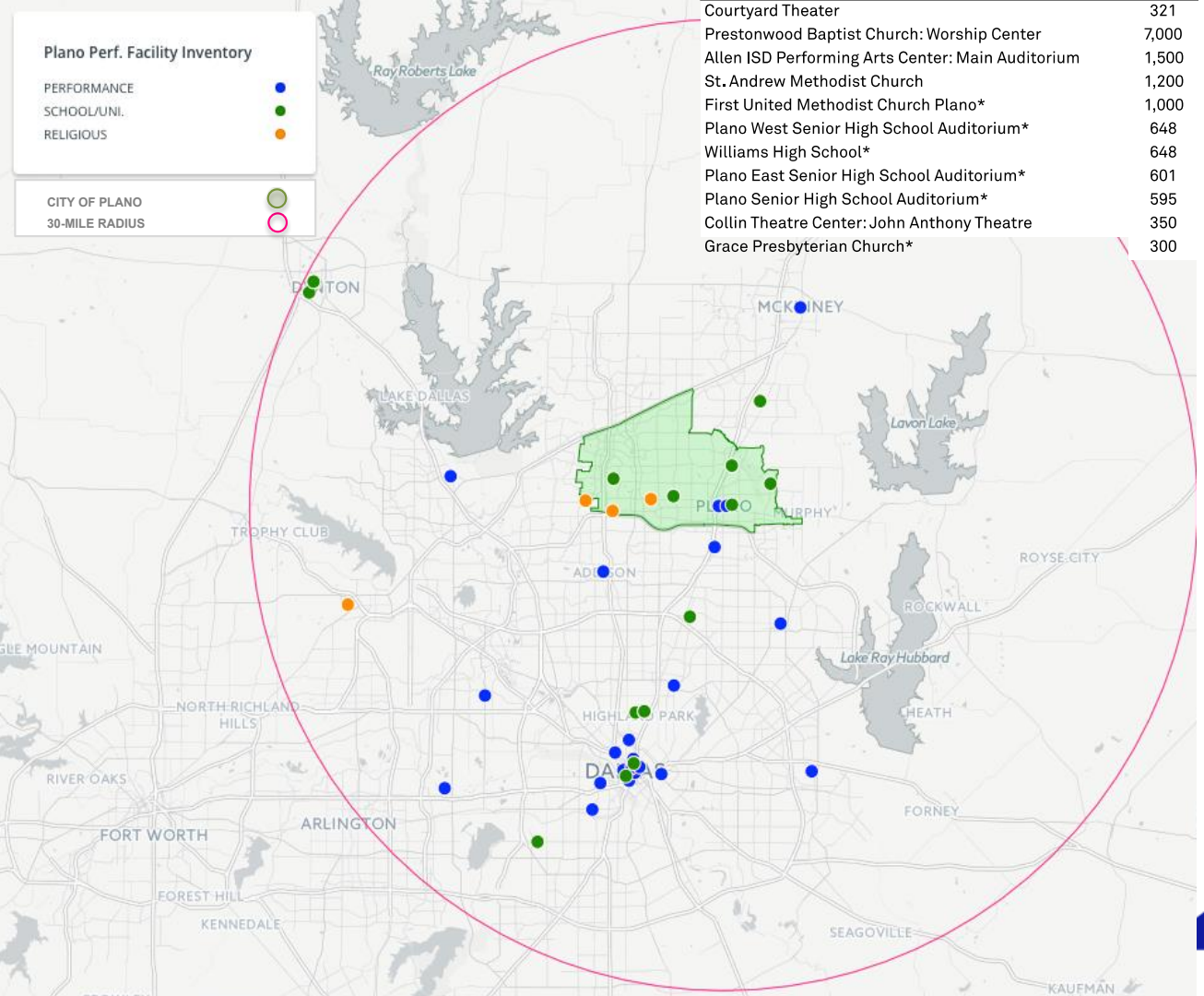
User demand

User Demand: Rehearsal or Classroom Facilities	Use (in hours)	Low Capacity	Ideal Capacity	High Capacity
This Side UP! Family	60	25	150	200
Plano Civic Chorus	100	-	100	-
Brick Road Theatre*	432	-	50	-
The Art Centre Theatre	500	30	40	100
MYO Youth Theatre	150	20	30	50
Astraios Chamber Music	120	5	8	10
Total Hours of Use Per Year	1,362	-	-	-

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User survey summary

- A survey was sent to 21 potential facility users, with 10 responses received.
  - Four of the responding organizations have an operating budget between $100K and $500K. Three have an operating budget that is under $100K.
  - All but one of the responding organizations uses multiple facilities for performances, rehearsals, and other programming.
  - Eight survey respondents answered yes to the question, “Do you support the development of new performance, exhibition, and/or rehearsal or classroom facilities?” Two respondents answered that they were not sure.
  - Similarly, eight respondents answered yes to the question, “Do you have interest in utilizing new performance facilities?”
  - When asked about the features they would require or prefer in a new performance facility, the majority of the responding organizations cited a large stage, a large lobby and/or reception area, and high-quality (unamplified) acoustics.
  - Four survey respondents expressed interest in using new rehearsal or classroom facilities.

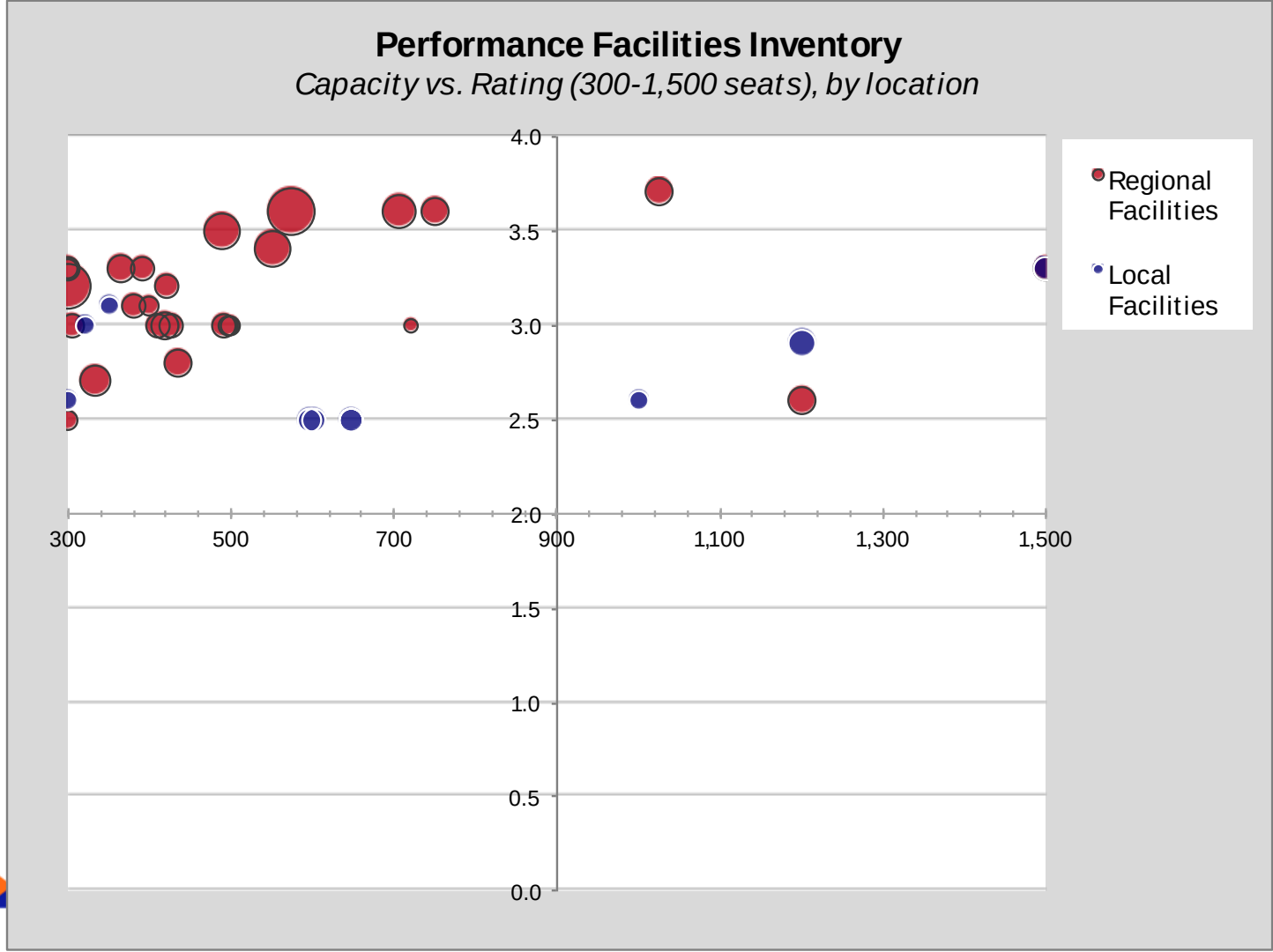


Courtyard Theater	321
Prestonwood Baptist Church: Worship Center	7,000
Allen ISD Performing Arts Center: Main Auditorium	1,500
St. Andrew Methodist Church	1,200
First United Methodist Church Plano*	1,000
Plano West Senior High School Auditorium*	648
Williams High School*	648
Plano East Senior High School Auditorium*	601
Plano Senior High School Auditorium*	595
Collin Theatre Center: John Anthony Theatre	350
Grace Presbyterian Church*	300

Verizon Theater at Grand Prairie	6,350
Gateway Church	4,000
Music Hall at Fair Park	3,420
SMU: McFarlin Auditorium	2,386
AT&T Performing Arts Center: Winspear Opera House	2,200
Meyerson Symphony Center	2,062
Bass Performance Hall	2,056
Black Academy of Arts & Letters: Theater	1,750
Majestic Theatre	1,703
House of Blues Dallas	1,625
Eisemann Center for the Performing Arts	1,563
Allen ISD Performing Arts Center: Main Auditorium	1,500
University of North Texas: Main Auditorium	1,200
University of North Texas: Winspear Performance Hall	1,025
Dallas City Performance Hall	749
Granville Arts Center: Brownlee Auditorium	720
Irving Arts Center: Carpenter Performance Hall	707
AT&T Performing Arts Center: Wyly Theatre	575
The Kessler	550
Mesquite Arts Center: Concert Hall	500
Kalita Humphreys Theater	497
SMU Meadows School of the Arts: Caruth Auditorium	490
Richland College: Performance Hall	488
Booker T. Washington HS for the Performing+Visual Arts:	435
McKinney Performing Arts Center: Courtroom Theater	427
El Centro College Theater	420
Mountain View College Performance Hall	420
University of North Texas: University Theatre	409
Rosewood Center: Baker Theater	400
SMU Meadows School of the Arts: Bob Hope Theatre	392
University of North Texas: Paul Voertman Concert Hall	380
SMU Meadows School of the Arts: Greer Garson Theatre	366
Dallas Museum of Art: Horchow Auditorium	333
Medical City Lewisville Grand Theater: Performance Hall	306
Addison Theatre Center	300
Latino Cultural Center	300
Sammons Center: Meadows Hall	300
University of North Texas: Lyric Theatre	300

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Local + regional performance facilities inventory



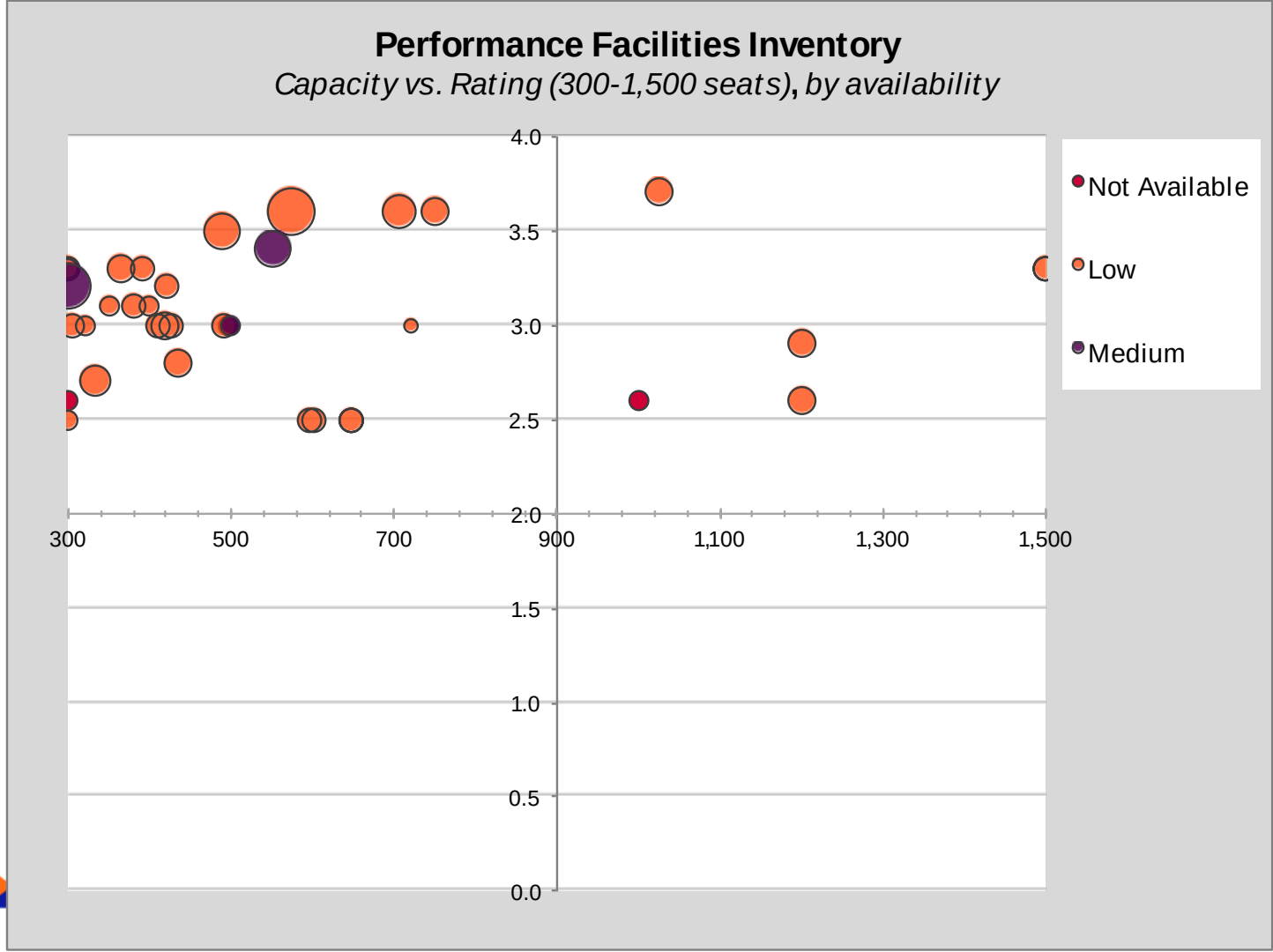
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Local + regional performance facilities inventory



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Local + regional performance facilities inventory

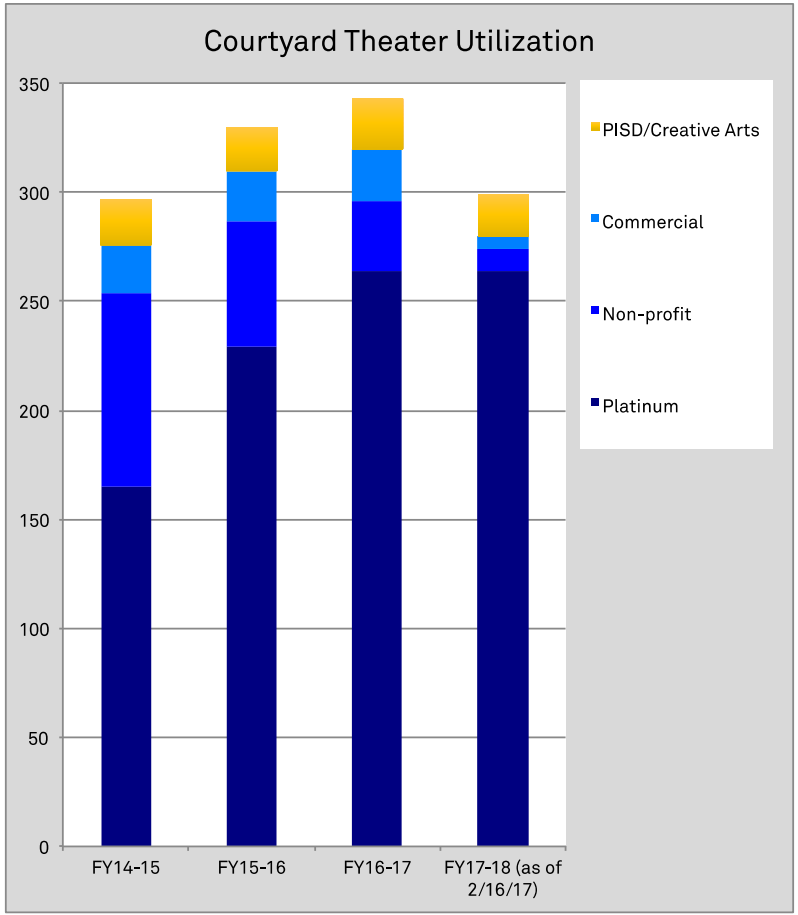


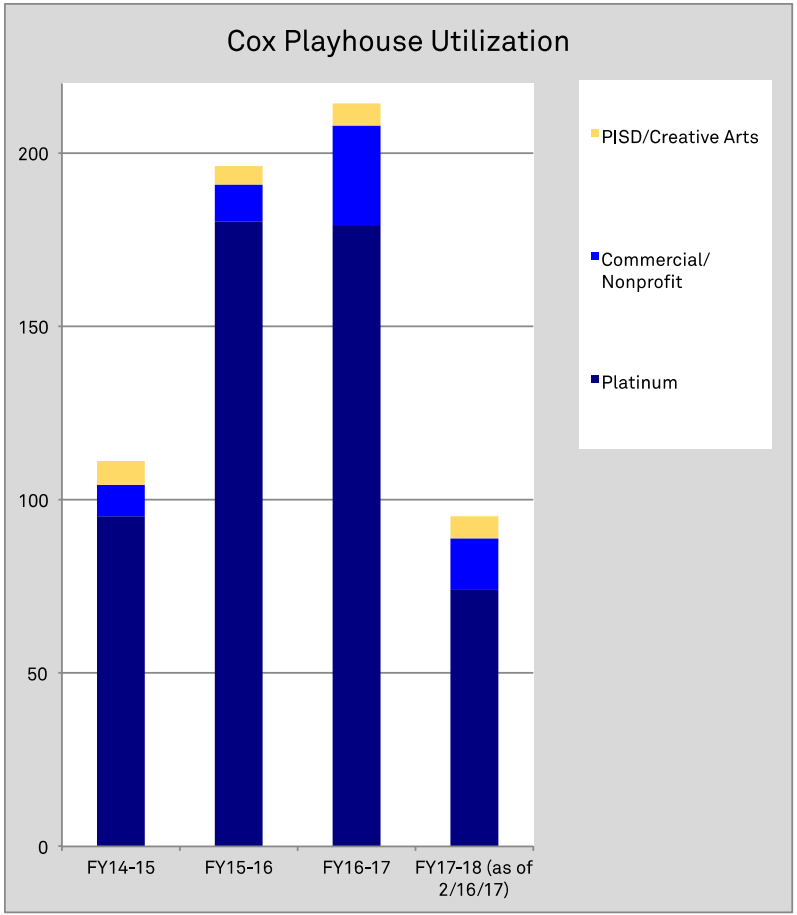
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Local + regional performance facilities inventory



Current facility utilization





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Benefits + impacts

- **The Downtown Arts, Culture + Events Plan** *(2015)* identifies a number of goals for downtown Plano. Its key goal is to "enrich life, build community and strengthen downtown Plano's identity and sense of place through celebration and support of the arts."
- **Plano Tomorrow: A Comprehensive Plan for Excellence** *(2015)* is a long-range plan for the future of Plano. It is built on five pillars that are intended to work together to improve the city. They are: Built Environment, Social Environment, Natural Environment, Economic Environment, and Regionalism. Goals identified in the plan include creating memorable and unique public spaces, promoting the advancement of arts and cultural amenities, embracing the community's historic character and authenticity, and determining the feasibility of new performing arts facilities.
- Additional goals, expressed by City leadership, include establishing gathering space that will foster a sense of community; supporting economic stimulation; supporting heritage preservation and the continued vibrancy of downtown; increasing downtown foot traffic; becoming the the premier city in Texas— "City of Excellence"; making art and culture a priority in the community; recruiting additional corporate entities; and continued growth.

Conclusions

There is an opportunity to develop additional facilities in Plano based on:

- ***The Market:*** The market for the arts is large and growing. In Plano and the 15-mile radius, there are high levels of educational attainment and household income, indicating propensity to support the traditional performing arts. In addition, the population is very diverse, indicating opportunities for non-traditional (hands-on and participatory) arts programs.
- ***User Demand:*** Research indicates that there are 601 days of demand for performance space. The majority of that demand (506 days) is for a space with fewer than 500 seats. An additional 1,362 hours of demand exists for rehearsal and/or classroom facilities.
- ***Facilities:*** The facility inventories indicate that the market for facilities is crowded, but that there are significant gaps, particularly for a high-quality facility with a capacity between 300 and 1,300 seats
- ***Benefits + Impacts***: Cultural development is in line with a number of community goals, especially those related to promoting and supporting downtown Plano as a cultural district and destination.

Recommendations

- Based on this, we recommend the following:
  - A new **community arts center** that responds to local and regional demand for performance, rehearsal, and teaching space. The facility should include a flexible, 400 to 600-seat theater with adjustable acoustics so as to accommodate film, speakers, theatre, dance, and music performances. Other spaces should include a gallery for hanging and installation art, multiple classroom and rehearsal spaces, and small practice rooms.
  - A **partnership with PISD** that ensures that the Plano Symphony Orchestra, Chamberlain Dance, the Community Band, North Texas Performing Arts, and potentially other groups might have access to their new facility. This partnership could take many forms, but the basic principle should be that, in return for some sort of support from the City (capital funding, site preparation, infrastructure, zoning variances, and/or other municipal planning and policy tools), the School District could make a binding commitment to support a level of community use of the new main hall.

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community arts center: Midtown Arts + Theater Center Houston | Houston, TX

- Opened in 2015 as a home and hub for Houston's numerous arts groups
- Developed out of a grassroots effort led by four arts organizations that were in need of a centralized space
- Comprised of two buildings that are separated by a breezeway. The buildings include:
  - Four performance spaces;
  - Three rehearsal studios;
  - 3,000 square feet of gallery space; and,
  - Offices for up to 60 arts professionals
- Programming includes dance, music, theatre, visual art, film, lectures/speakers, and performance art







***community arts center:* Rialto Theater | Loveland, CO**

- Opened in 1920; Reopened in 1998
- Main stage has a capacity of 446 seats
- Owned and operated by the City of Loveland
- Programming includes national touring, local arts groups and artists, independent films, and silent films with live music accompaniment
- Amenities include state-of-the-art sound and lighting equipment
- Ancillary spaces include the Devereaux Room (cap. 100), which is used for meetings and events, and the Conference room (cap. 10), which is used for small meetings





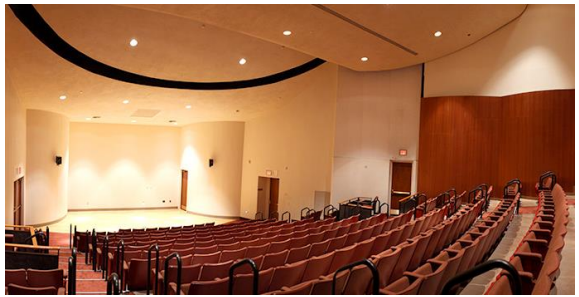


facility partnership: **Chandler Center for the Arts | Chandler, AZ**

- Opened in 1989 as shared facility between the City of Chandler and the Chandler Unified School District
- The facility is designed so that the rear sections of the main auditorium (capacity of 1,500 seats) can rotate to become two smaller spaces
- Monday through Thursday, the Chandler Center is used by the school; Friday through Sunday, it is used by community organizations or presented shows
- This facility's success led to the creation of a satellite facility in the city's historic downtown







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facility partnership: **Terrell ISD Performing Arts Center | Terrell, TX**

- Opened in 2003
- Funding for the $7.5 million was approved by local voters as a stand-alone proposition
- The 1,534-seat facility hosts 65 school events and 25 rental events annually
- It is home to the Terrell Alliance for Education and the Arts' E! Terrell Entertainment Series (a presented music series that also provides interactive student enrichment performances for students) and Lake Country Gospel Jubilee Productions
- For every production, theater students at Terrell High School operate sound and lights







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Discussion

- Have we fairly described the situation and the opportunities for additional performing arts facilities in Plano?
- What additional input and information is needed?
- Are our recommendations in line with your sense of needs?
- Where do you go from here?