

Navigating Uncertain Times

A Scenario Planning Toolkit for the Arts & Culture Sector

Overview

October 2020



AEA Consulting

Commissioned by

Wallace



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Long-Term Scenario Planning: Foreword from The Wallace Foundation



As of this writing, the global pandemic that was first identified in December 2019 followed by the most sweeping protests in half a century continue to upend the performing and visual arts sector, causing uncertainty about what a “new normal” could look like, and when it will take shape or even shift shape.

The impact of the pandemic to date is already growing clearer. A recent TRG study *Covid-19 and the Performing Arts – Six Months After Closure* found that between March 16 and Sept. 15, 2020, ticket sales for non-profit performing arts organizations in North America plummeted 83% compared to the same period in 2019. Those findings echo an August study by the Brookings Institution *Lost Art: Measuring COVID-19’s devastating impact on America’s creative economy* that estimated losses in the fine arts and performing arts industries in the U.S. at \$42.5 billion in sales, with 1.4 million lost jobs, about 50 percent of the total, between April 1 and July 31, 2020.

The pandemic may also change the future, although just how is uncertain. In the companion document to this tool, *Arts Organizations’ Early Response to COVID-19 Uncertainty: Insights from the Field*, majorities of arts organization leaders interviewed and surveyed between March and June said they anticipated change: 54% said they expect decreased ticket sales; 59% new income streams; 79% shifts in digital programming; and 73% a worsening of socioeconomic divides in participation. In short, as the authors note, “however the US emerges from the immediate crisis of COVID-19, it will be...less predictable and more turbulent” with “a wide range of possible operating environments.”

It’s precisely this uncertainty that makes this scenario planning tool of such potential value to performing and visual arts organizations. Its aim is not to forecast *the* future, but to help you think through how your organization could respond to *different* futures. The goal is to be more ready for whatever happens, and to think about how different strategies would fit with different futures. The four futures (or scenarios) in this tool are built around two kinds of uncertainty of special relevance to arts organizations: the course of the pandemic and people’s propensity to gather. An equally important shift in the context is the long-overdue national conversation about racial justice, and, more broadly, equity, and the role of institutions. How to respond is an essential part of thinking about the future and is built into this tool.

In fact, the current crisis could be a chance to contemplate a better future. As Morela Hernandez of the Darden School of Business wrote in the *MIT Sloan Management Review*, “We currently exist in a world that is unfrozen from the constraints of routine, habits, and norms. By leveraging this moment to explore, experiment, and learn, organizations and their community stakeholders have a unique opportunity to redefine the scope of their priorities and collective actions.”

This tool, developed carefully by AEA Consulting with input from field leaders, will not tell you what to do. There are no silver bullets inside. We do, however, hope it provides a means to advance your own thinking and that of your organization as you move forward.

Will Miller, President
The Wallace Foundation
October 2020

2020 first brought COVID-19, followed by widespread civil unrest around racism and police brutality – what happens next?

The global spread and impact of the COVID-19 pandemic in early 2020 laid bare the cultural sector's fragility in the face of prolonged stoppages. Nearly every performing and visual arts organization closed during the peaks of the pandemic, with employees furloughed and millions in financial losses mounting daily. Then, as organizations began turning their eyes toward reopening strategies, the killing of George Floyd re-ignited protests against police brutality and the history of injustice against black people (and other people of color) in the United States. Protests led to confrontations with police, the deployment of the National Guard, and invocation of curfews around the country. In response, surveys showed support for the Black Lives Matter movement jumping dramatically and calls to defund police departments emerged into the mainstream. Cultural organizations were no longer simply concerned with procuring enough masks and hand sanitizer to reopen their doors – many now also face challenges acknowledging and changing a legacy of institutional racism.

This sketch of 2020 leaves out any number of further complicating factors – economic inequality; political polarization; the re-emergence of nationalist governments across the globe; continued technological breakthroughs, including artificial intelligence; a climate crisis – that are brewing underneath. Each problem is complex by itself; when combined, projecting the future environment as a basis for strategic and operating decision-making is extremely challenging. Sudden, unpredictable change may be the new normal.

How can the arts and culture sector move forward in this environment? While many organizations are currently consumed by short-term decision making (re-envisioned programming, furloughed staff, cash flow management, etc.), others are nevertheless looking to the future. But what does that future look like and what is the place of cultural organizations, individual artists, support workers, funders, etc. in that future? While we may not be able to predict the future, one tool that can help us prepare for the possible outcomes is *scenario planning*.



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Photo: Ted Eytan (CC BY-SA 2.0)

Scenario planning is a forward-looking method that can help organizations prepare for potential threats and capitalize on hidden opportunities

Scenario planning is more than a way to evaluate short-term financial performance based on reopening dates or capacity limits. While financial planning can no doubt be valuable to the sector, it does not help reset the thinking of individuals and organizations constantly facing a volatile, uncertain, complex, and ambiguous – not to mention unjust – environment. The events of 2020 have brought disruptions to supply chains, consumer demand, the comforts of privilege, and many of the assumptions that underpin “typical” operations and planning in the sector. **There is an opportunity to return to core principles – purpose, mission, and service to communities and audiences – to think deeply about new directions.**

Scenario planning, when based in longer-term futures thinking, is a tool to do just that – developing concrete ideas about unexpected future outcomes. The process involves scanning the external environment for macro forces and industry trends that, when combined, create maps of possible emerging landscapes. This helps to diminish an over-reliance on past performance to predict the future – which is especially important in times of rapid change and ‘radical discontinuity’ such as those we are experiencing. Recovery after the current crises will most likely not resemble 2019, nor will it proceed like the events that followed the 2008 Great Recession, 9/11, the Asian financial crisis of 1997, the 1987 market crash, ‘stagflation’ in the 1970s, or the civil rights movement of the 1960s.

The scenarios presented here attempt to answer the question of what the world and the sector might look like when it emerges into a “new normal.” They are not meant to be exact predictions of what will happen but instead to suggest a range of possible futures sufficiently different to spark creative thinking about how one might respond to each. That thinking includes analyzing the impact of each of these scenarios on the sector and its actors and comparing commonalities across scenarios. Through these steps, we can begin to examine the potential impacts and explore the concrete steps needed to prepare for the future. The scenarios are prompts that provoke us to ask ourselves: *What will we do if this happens?*

Scenario Planning Goals

1. To provide a framework for planning in conditions of uncertainty
2. To ensure that planning fully takes into account wider social, economic, and other exogenous forces that are likely to have significant impacts
3. To guard against systemically optimistic or pessimistic thinking – and against “groupthink”
4. To find commonalities within possible futures that can be planned for today, and to promote nimble response when outcomes are in doubt
5. To identify how individuals and organizations can focus on their core purpose and be proactive “shapers” within and between potential futures



By mapping current trends and future uncertainties we can begin to imagine possible futures in a rapidly changing environment

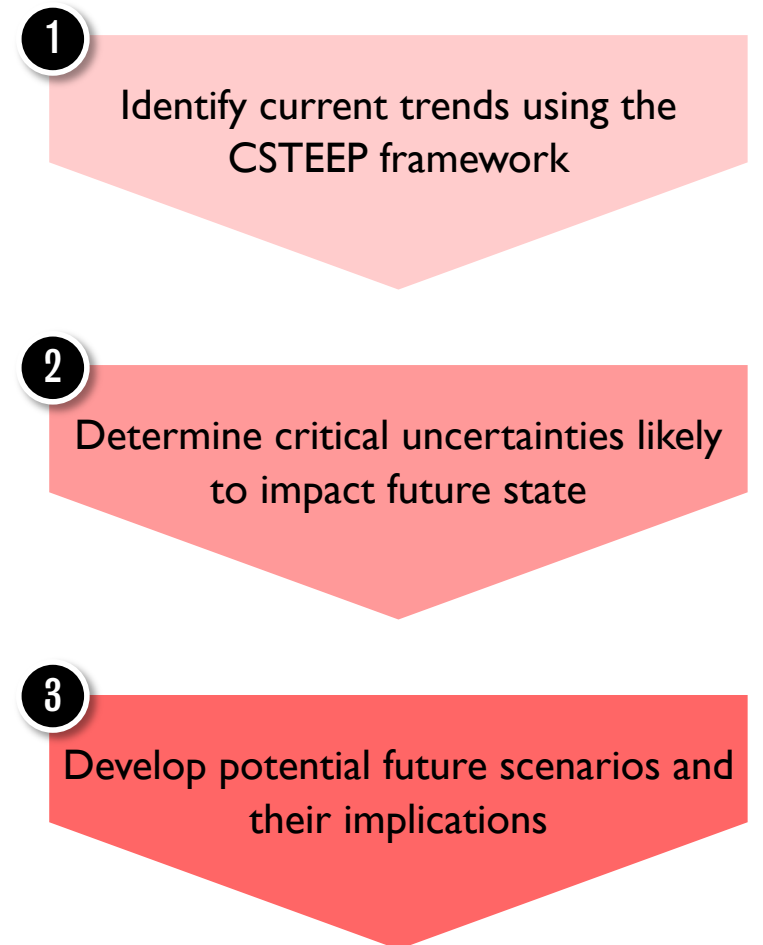
AEA Consulting regularly tracks and monitors global trends with the potential to significantly impact the arts and culture sector. This research is used to inform our client work in the development of strategic plans, capital project feasibility studies, cultural policy, and other strategy and planning work.

Initially in response to the COVID-19 pandemic and continuing during the anti-racist demonstrations in the summer, we expanded this research to identify more than 90 trends currently impacting the global macro drivers of the STEEP framework: **Society, Technology, Economy, Environment, and Politics**. We have complemented that framework with our existing library of arts and culture trends – grouped as **Creativity** – to create a comprehensive picture of the pre-COVID-19 state of the world related to the arts sector.

Within these trends, there are numerous future uncertainties still unfolding that could significantly impact our future. These include the duration and our response to the pandemic, the character and depth of the economic recession, the speed and impact of measures adopted to mitigate against climate change, and the impact of the Black Lives Matter and social justice movements – all result in lasting changes to the sector and society. By combining these uncertainties with pre-COVID-19 trend data and current impacts of the pandemic and anti-racism movement, we can begin to imagine what our future may look like.

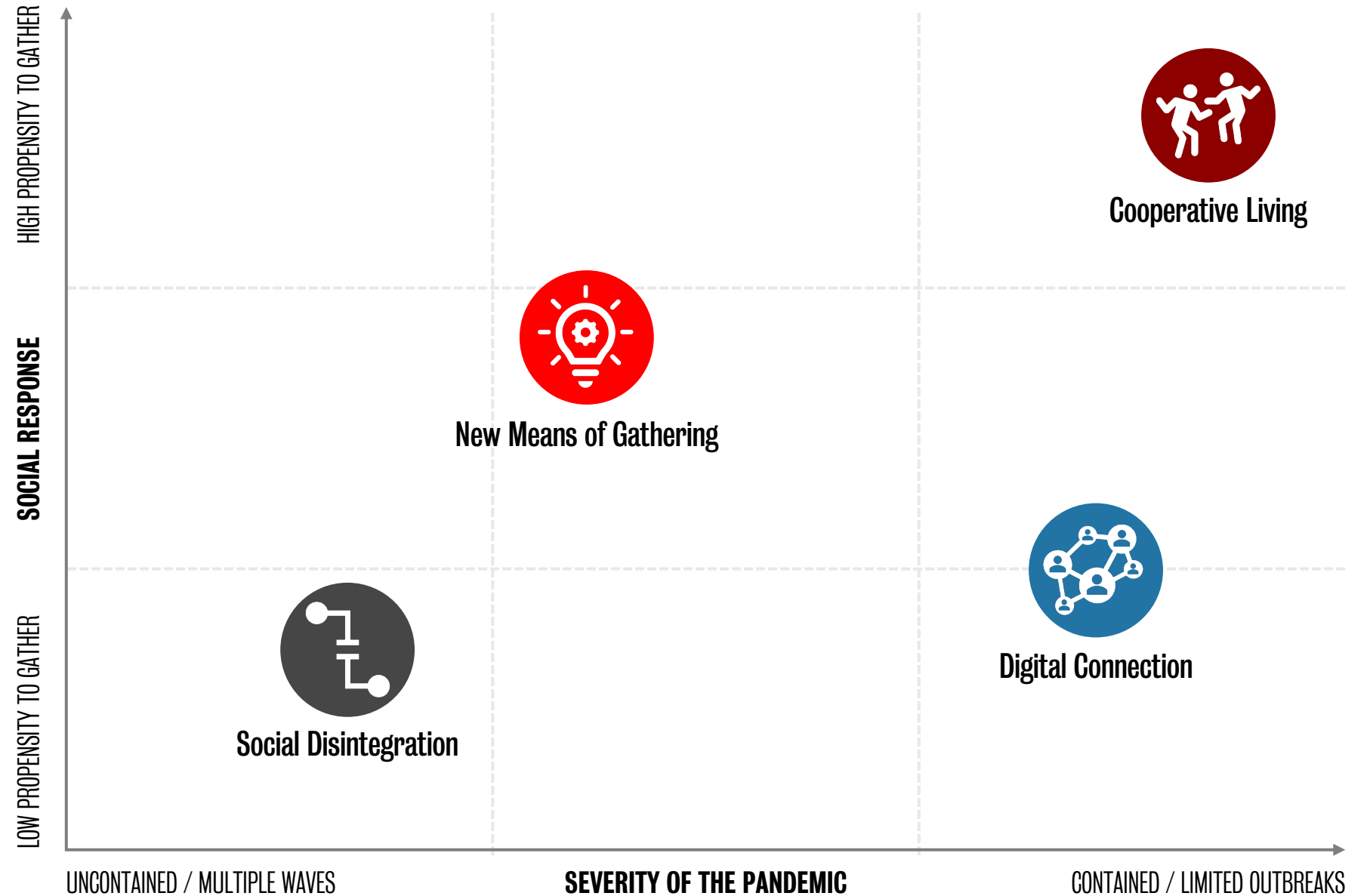
While these future scenarios are the result of the impact of many of the trends and forces above, on the following page we have plotted four future scenarios across two uncertainties that we think will have a significant impact on *the range of outcomes* in the sector over the next five years:

- *The severity of the COVID-19 pandemic*: how will the virus, and our ability to protect ourselves from it, progress?
- *The social response*: in this context, how will our propensity to gather in groups be affected?



Four potential future scenarios

- 1 Cooperative Living**
The virus is largely controlled within 12-15 months and focus on social justice grows, creating a new sense of optimism and rush back to the social scene with vigor and enthusiasm
- 2 New Means of Gathering**
A resurgent virus creates significant challenges but, ultimately, deeply ingrained social behaviors persevere in transformed ways
- 3 Digital Connection**
While the COVID-19 pandemic is contained, the threat of future outbreaks leads to continued physical distancing and focus on digital interaction
- 4 Social Disintegration**
Prolonged outbreak of COVID-19 and recurring pandemics from a mutated virus lead to the decline of social life and underlying support systems



Scenario 1: Cooperative Living Overview

What Happens

The COVID-19 pandemic is controlled by late spring 2021 thanks to continued coordination between governments and the private sector, and the scientific community then leverages new technologies – genome sequencing, machine learning, advanced methods of production, etc. – to develop and deploy a broad vaccine against the virus, calming fears and creating a sense that we can “conquer” biology. Alongside early successes reforming institutions in the wake of the anti-racism protests in 2020, a new era of optimism emerges, with deep social engagement.

In contrast to the anxiety seen during the early days of the spread of COVID-19, the relatively quick defeat of the virus ushers in a new optimism and sense that the collective will of society can accomplish big things. Alongside the new vaccine comes a rush to return to social activities – large-scale events such as concerts and sporting events see record attendance as people are excited to return to the ways of life previously known. In-person activities are in some ways more popular than they were before, though they are now more focused on activities that demonstrate a new collective focus and energy. The Black Lives Matter movement delivers new, lasting changes, and the movement for climate justice is now at the forefront.

The cultural sector returns with a focus on new creation and participatory events. The sense of collective good and broad-based justice takes on an even larger focus as a part of artistic work, with individual artists and smaller creative organizations returning with new prominence, having managed creative energies on shoestring budgets in the interim crisis period. Audiences focus on “values alignment” and return to organizations that provide a forum for people to come together, particularly culturally specific organizations with close ties to their communities. Artworks and productions that effectively mix digital and analogue activities are increasingly popular, especially those that do so in a way that effectively leverage the development of new technologies after the crisis – but also navigate privacy concerns.



Critical Implications

- Mission-oriented engagement with large-scale social issues is important, as audiences are seeking out opportunities to deal with larger issues and build collective justice.
- In the wake of anti-racism protests, pressure builds for more representative Boards and institutional change. Culturally specific organizations take on new prominence and become a new funding focus.
- Participatory events are a focus, with audiences interested to join artists’ journeys.
- Employment rebounds, and interest in workers’ rights mean that pay is increasing for junior-level and less-skilled labor.
- A tech backlash means there is increased focus on privacy issues on digital platforms.
- Mental health is an increased focus.



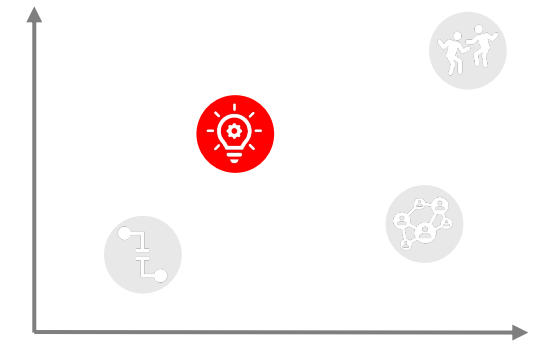
Scenario 2: New Means of Gathering Overview

What Happens

The COVID-19 pandemic passes within eighteen months but resurges six months later as the initial vaccine is not as effective and less-available than forecast, causing new rounds of furloughed workers and the reintroduction of social distancing measures. U.S. governments at many levels are slow to respond, and the public is initially reluctant to comply with new containment measures. New outlets for public engagement emerge, particularly to progress social justice.

The desire to gather in-person was in full effect during the six-month “all clear” period in 2021, with many focused on social engagement and restaurants and museums experiencing near capacity visitation numbers. The virus’ return spells bad news for the hospitality and entertainment sectors, but it does not entirely prevent social gathering as people look for new and innovative ways to safely engage outside of the home and work to advance social justice movements through alternative means. Digital location and biometric tracking advance further during the second wave, to identify hotspots and potential virus carriers. Some, including vulnerable populations, choose to stay home using primarily digital means of engagement. Meanwhile, the early signs of flight from dense urban centers increase during the recurrence: wealthy city dwellers flee to the suburbs, largely leaving major metro areas to lower income households.

The cultural sector reopened with initial audience enthusiasm at a level not seen in years. While some small and mid-sized organizations were forced to close, more nimble companies and those focused on social justice issues relaunched immediately. Legacy institutions sought to draw back audiences with “We are back!” seasons – but these are suddenly cancelled at the second outbreak. Venues adopt long-term social distancing practices and new digital platforms allow audiences to connect from home. Young artists, many focused on carrying forward the Black Lives Matter movement, used the quarantine as an incubation period for new ideas and methods of distribution, fundamentally altering how many people consume and value arts.



Critical Implications

- A “double dip” recession brought by a second virus wave increases unemployment.
- There is continued desire to gather as the pandemic increased loneliness and depression; arts organizations engage low-cost production models in physically distanced venues.
- Protests in support of Black Lives Matter and other social justice campaigns become primary locations for site-specific artworks.
- Creative production rises as artists seek new methods and distribution platforms for socially engaged content, with a good deal of creative activity moving to the digital space.
- Contact tracing and health monitoring are seen as critical, with government surveillance welcomed and taking hold in most states.



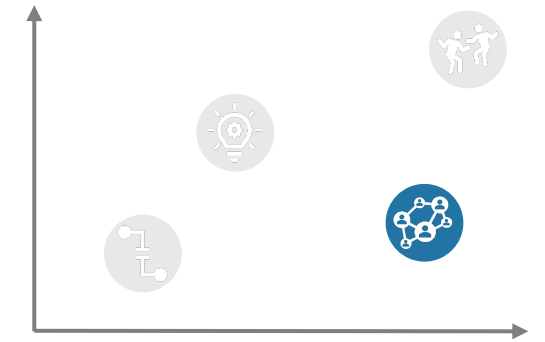
Scenario 3: Digital Connection Overview

What Happens

The medical response to the COVID-19 pandemic proves successful and a vaccine is developed and broadly distributed before winter 2021 / 2022. This creates a sense of stability globally, and the economic impact is smaller than first anticipated. However, the psychological impact of a second wave of the virus that appeared once social distancing measures were lifted, combined with the threat of potential future outbreaks, causes lasting changes to our social behaviors.

While the pandemic is eventually contained, vaccine distribution is slow and costly and a second wave causes lasting psychological impacts. A new sense of fragility and anxiety results in a reduced propensity to gather in large groups. Gatherings in support of social justice movements recede, although activism continues online, and there is increased focus on health and wellbeing as self-preservation is of paramount importance. Remote working is normalized for those who hold positions that can be performed remotely. As people spend more time at home, the digital world is more deeply ingrained and social lives become largely virtual. Significant investment in R&D creates new technologies and efficiencies as AI, reality technologies, and robotics become increasingly affordable and widespread. Schisms deepen in society between those who have reliable, high-speed digital access and those who do not.

The arts sector is forced to adapt to these changes, with an urgent need to re-think programming and business models to suit the new normal. Digital and highly localized programming become increasingly important as audiences are reluctant to leave home and, when they do, they are not willing to travel far. New markets develop for streaming services and other forms of digital culture, entertainment and learning, with the arts and culture sector able to contribute to the development of new offerings and modes of experience. The digital migration is coupled with growth in hyper-local arts and cinema clubs and renewed interest in cooking, painting, music, and other hobbies as more time is spent in the home.



Critical Implications

- Professional and social lives shift increasingly into the digital world as people are reluctant to gather in-person and new technologies improve our ability to communicate remotely.
- A sharp decline of in-person attendance is coupled with rapid growth of new digital audiences, creating new opportunities for artistic creation and distribution.
- However, this leaves behind marginalized populations that lack high-speed internet and access to new technologies at home.
- Based on new audience behaviors, arts and culture producers and presenters shift their focus increasingly to digital and small-scale local formats.



Scenario 4: Social Disintegration

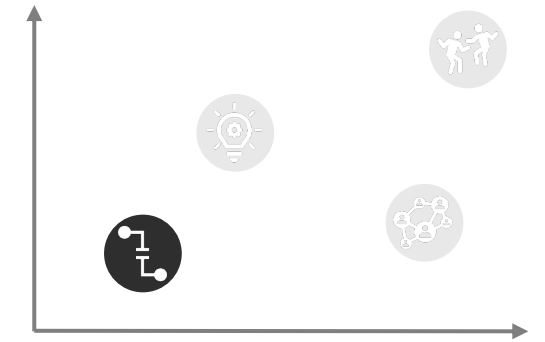
Overview

What Happens

While a vaccine for COVID-19 is developed by mid-2021, it is costly to deploy, limiting widespread usage. Recurring instances of COVID-19 and other novel viruses continue to affect those with vulnerable health conditions, frontline workers, and their families – disrupting social and economic life. Meanwhile, civil unrest continues as politics are polarized and no trusted leaders emerge to bring together the fractures that have begun to show in society.

Reluctance to participate in large gatherings leads people to limit socializing and entertainment to the comfort of their homes or the most familiar local venues and public places (pubs, bars, restaurants). Social isolation is the new normal for many vulnerable groups, who seek new connections in the virtual space and maintain the same social circle and habits they developed prior to the outbreak of COVID-19 and other novel viruses that followed. A lack of exposure to others leads to decreased empathy and tolerance for those who are different, leading to increased social and economic polarization.

The arts sector becomes fragmented: large organizations see decreased funding in a depressed economy; mid-size organizations with high fixed costs are pushed out of existence by low attendance levels and resulting financial strain; and small organizations that are not closely tied to their communities must find ways to pivot, potentially transitioning into the digital space. Some culturally specific organizations find a way to deliver to their core audience, but funding is a challenge for many and a rise in extremism means their work is a locus for controversy. There is place-based demand for individualized and intimate experiences mostly attended by Gen Z and some Gen Y and Gen X audiences, thus changing the nature of artistic output to cater to tastes of younger and local audiences. Arts influencers – new types of creative superstars – continue to emerge in the virtual sphere, but their creative lives are short-lived as they are finding it hard to monetize their creative output. Artistic production requiring collective input is in decline.



Critical Implications

- Society is further polarized by inequitable access to key resources and healthcare, making previously underserved groups particularly unlikely to engage in any arts activities.
- Creative production largely moves to the digital realm and new hyper-local formats, often driven by individual artists rather than organizations.
- Weakening ability to gather in public spaces moves cultural consumption to digital platform and small group activities and pursuits.
- Rise of economic and societal pressures leads to mental health crisis and arts organizations are encouraged to play their role and partner with healthcare and social services providers.



Each scenario is distinct and presents its own opportunities and challenges for the arts and culture sector

Cooperative Living



- Increased participation opens doors for new artistic practice
- Close community engagement provides an opportunity for "co-creation"
- New technology tools prioritize people and maintain privacy standards
- Move away from cities reduces cost pressures on artists
- Focus on social justice and remedies to institutional racism

- Reduction in large-scale travel means new audience options are limited
- For-profit businesses are better able to compete for leisure time than cash-strapped non-profits
- Philanthropic funding may be crowded out due to focus on other priorities
- General sense of complacency limiting innovation and resilience

Social Disintegration



- Hyper-local and personalized experiences attract loyal audiences
- New organizational forms and models for operation (e.g. impact investing)
- New creative disciplines merging tech and art lead to new partnerships and practices
- Arts initiatives offer ways to improve wellbeing through small-group practice and online participation

- Deterioration of public life
- Mental health reduces audience capacity for artistic participation
- Online streaming and gaming compete successfully with traditional arts
- Risk of terrorism in a fractured society creates further obstacles to in-person group gatherings at cultural venues
- Sharp decline in tourism and urban population

New Means of Gathering



- There is a strong audience desire for both in-person and digital content
- Collaboration among industry partners increases to offset new expenses
- More work is brought to small cities and neighborhoods historically underserved
- New and existing venues built/modified to accommodate new capacity regulations and social distancing

- Capacity falls as limits are placed on the number of people who can gather
- Ticket prices also fall as disposable income spent on essential items
- Some consumers steer clear of the arts in search of humor & "light relief"
- International and domestic tourism decreases significantly
- Urban-flight (and fear of mass transit) decreases attendance in major cities

Digital Connection



- New technologies and markets for digital consumption develop rapidly
- New funding opportunities emerge especially for digital and local programming
- Increased sponsorship for individual artists and creators as 'influencers'
- Increased demand for creativity and learning in the home

- Visitation to location-based events and experiences is significantly reduced
- Competitive funding environment for the arts as social impact is prioritized
- Arts and culture organizations struggle to compete with corporate tech firms
- Digital divide is deepened for low income and marginalized groups
- Appreciation of material culture is threatened

However, the future scenarios include some common outcomes

Common future outcomes

Increased focus on racial equity and social justice



Increased digital engagement



Decreased domestic and international tourism



Decreased government and/or philanthropic support



Adapted form and function of cultural infrastructure



Need for environmental action



Better understanding of mental health impacts



Potential implications

- Change among arts leadership and trustees to create space for those who have been under-represented
- A wider diversity of art and artists being represented and championed by cultural organizations
- Increased scrutiny of arts management, funding, and programmatic decision-making

- Proliferation of new creators and platforms focused on digital production and consumption
- Development of new business models and regulatory frameworks specialized for the digital sphere
- Risk of greater inequity and deepening of the digital divide as new technologies emerge

- Focus on local audience development and co-creation with existing communities to deepen relationships and develop new types of cultural experiences
- Shift away from international exhibitions, events and festivals to regionally specific and digital experiences

- Need for innovation in earned income generation, especially those enabled by digital
- Development of channels to directly support artists and creators

- Re-use and re-design of cultural spaces to enable social distancing and encourage new uses during closures or down time
- Decreased and/or flexible venue capacities to maintain social distancing measures and increase circulation

- Recurrent climate disasters met with increased concern, with cultural infrastructure in some areas at risk
- Arts and culture help lead in developing an understanding of the collective action required to address the climate crisis

- Increased flexibility and support for artists and workers e.g. flexible working hours and opportunities for remote working
- Increased emphasis on the role of the arts in addressing psychological conditions such as anxiety, depression, PTSD and loneliness



What next? We have developed a set of tools to help arts and culture organizations prepare for whatever the future holds

Using the “Planning Worksheets” document, contemplate the possible futures

In each scenario ask yourself...

1. How is our mission / purpose relevant in this context?
2. What would the likely impact be on our:
 - i. Communities and audiences?
 - ii. Programming?
 - iii. Revenue generation? (earned income, contributed income, and public funding)
 - iv. Infrastructure / physical assets?
2. What are the best paths to remedy legacies of institutional racism and move towards equity and inclusion?
3. How do we respond to the climate crisis and create a sustainable future?
4. How can we support artists and the creation of new work?
5. What strengths or assets do we have to help you accomplish these?
6. What weaknesses do we have that would hinder us?
7. What new opportunities would there be? How can we become an active “shaper” of the future?
8. What are the greatest threats to us?

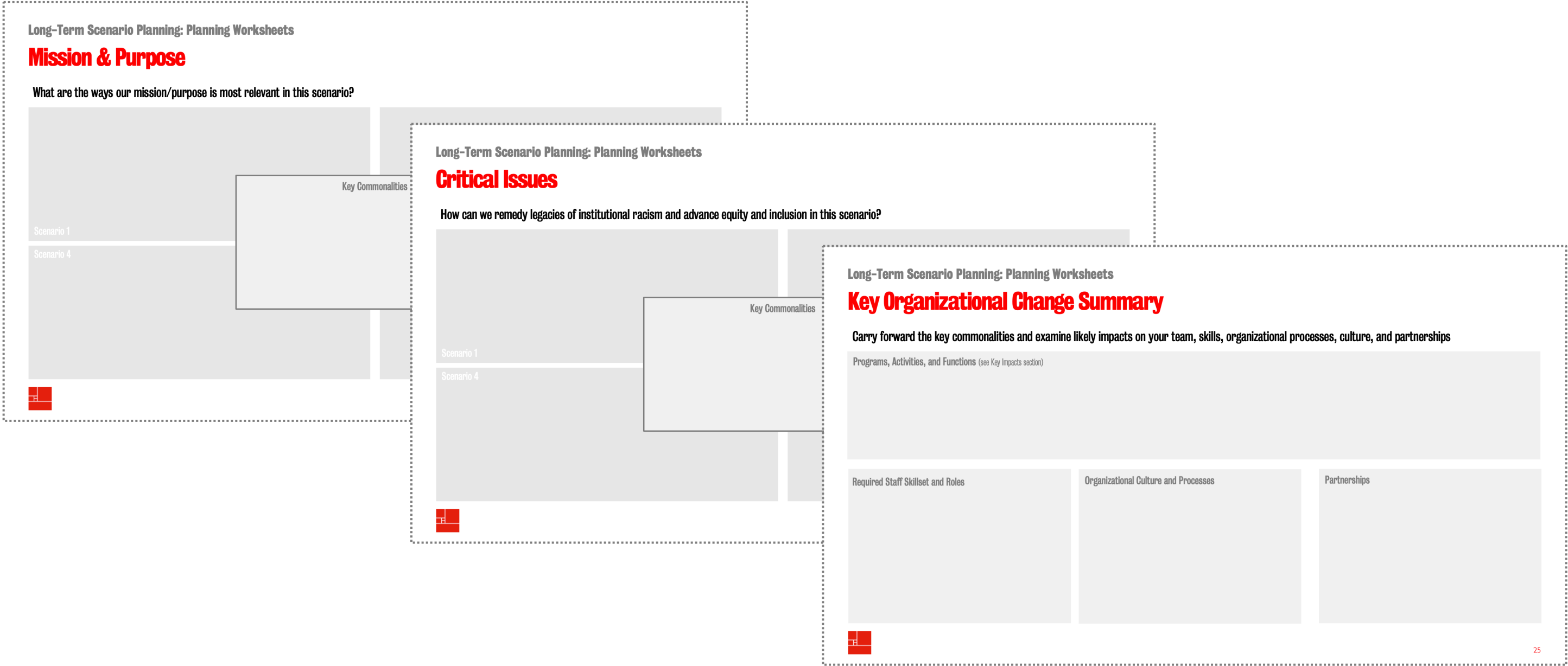
Other questions to consider

- Which of your previous assumptions about the future need to be rethought? What prospects that seemed unlikely or years away could be accelerated?
- Which scenario best describes the world that you are currently preparing for? Is there a scenario that you are currently ignoring – but shouldn't be?
- How might your local market / context be different than other areas around the country? Will your community require a different response?
- Who can you reach and who can't you reach? Who is the market not serving otherwise?
- What new organizations, business models, and ecosystems might emerge in response to this future? How can you position yourself to take advantage of those?
- Which future would be most challenging? How can you mitigate those impacts?
- What capabilities, partnerships, and strategies do you need to learn more about?



Planning Worksheets Examples

See “Planning Worksheets” document for more detail



Each detailed scenario includes a deeper exploration of impacts on the global context and the arts and culture sector

Each of the four scenarios is described in five pages in the separate Detailed Scenarios document:

1. Overview – provides the introductory “story” of each scenario and lists potential critical implications the sector may need to consider in this future
2. Macro Forces – identifies the trends that are making the largest impact within each force in the CSTEPP framework
3. Arts & Culture Sector Indicators – a directional look at ten metrics that show where the sector is headed
4. Arts & Culture Sector SWOT Analysis – a look at the strengths, weaknesses, opportunities, and threats for the sector
5. Arts & Culture Sector Stakeholder Impacts – a review of key developments for each of ten stakeholder groups in the sector

The Summary section at the end of the document highlights key indicators for each scenario, and comparison of impacts on the arts sector and impacts on audiences by scenario.

We have also provided a set of blank scenario pages to allow for the creation of alternative scenarios to further target specific contexts or organizational needs.

See “Detailed Scenarios” document for more detail



1. Cooperative Living

Pages

6–10



2. New Means of Gathering

11–15



3. Digital Connection

16–20



4. Social Disintegration

21–25

Summary

27–29



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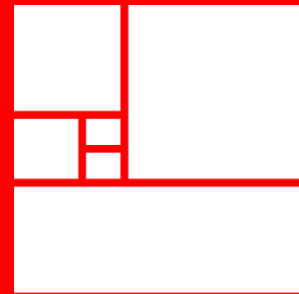
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AEA Consulting

AEA Consulting is a global firm setting the standard in strategy and planning for the cultural and creative industries. AEA is known for providing candid and impartial advice that draws on deep knowledge of the cultural sector as well as robust research and analytical insight.

Since 1991, AEA has successfully delivered more than 1,000 assignments in 35 countries, helping clients around the world plan and realize vital and sustainable cultural projects.

With offices in New York and London, AEA offers a talented, multidisciplinary team of professionals with proven practical experience who deliver personalized solutions to organizations in the arts, cultural, creative, and public sectors. AEA thrives on new challenges and approaches problem-solving with curiosity, creativity, and integrity.

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Wallace 

Based in New York City, The Wallace Foundation is an independent national philanthropy that seeks to improve learning and enrichment for children and foster the vitality of the arts for everyone. Its current areas of interest include school leadership, expanding and diversifying audiences for the arts, social and emotional learning, summer learning, arts education, and afterschool. Wallace aims to help solve problems facing the fields in which it works, benefiting both the organizations it works with directly and the broader field by developing credible, useful knowledge to inform policy and practice nationwide. The foundation maintains a free, online Knowledge Center at www.wallacefoundation.org.