



Transforming Arts Organizations Worldwide

Bringing Shared Values To Life

January 2020

Agenda for Our Time

01

Risks and
Obstacles of a
Shared Values
Approach

02

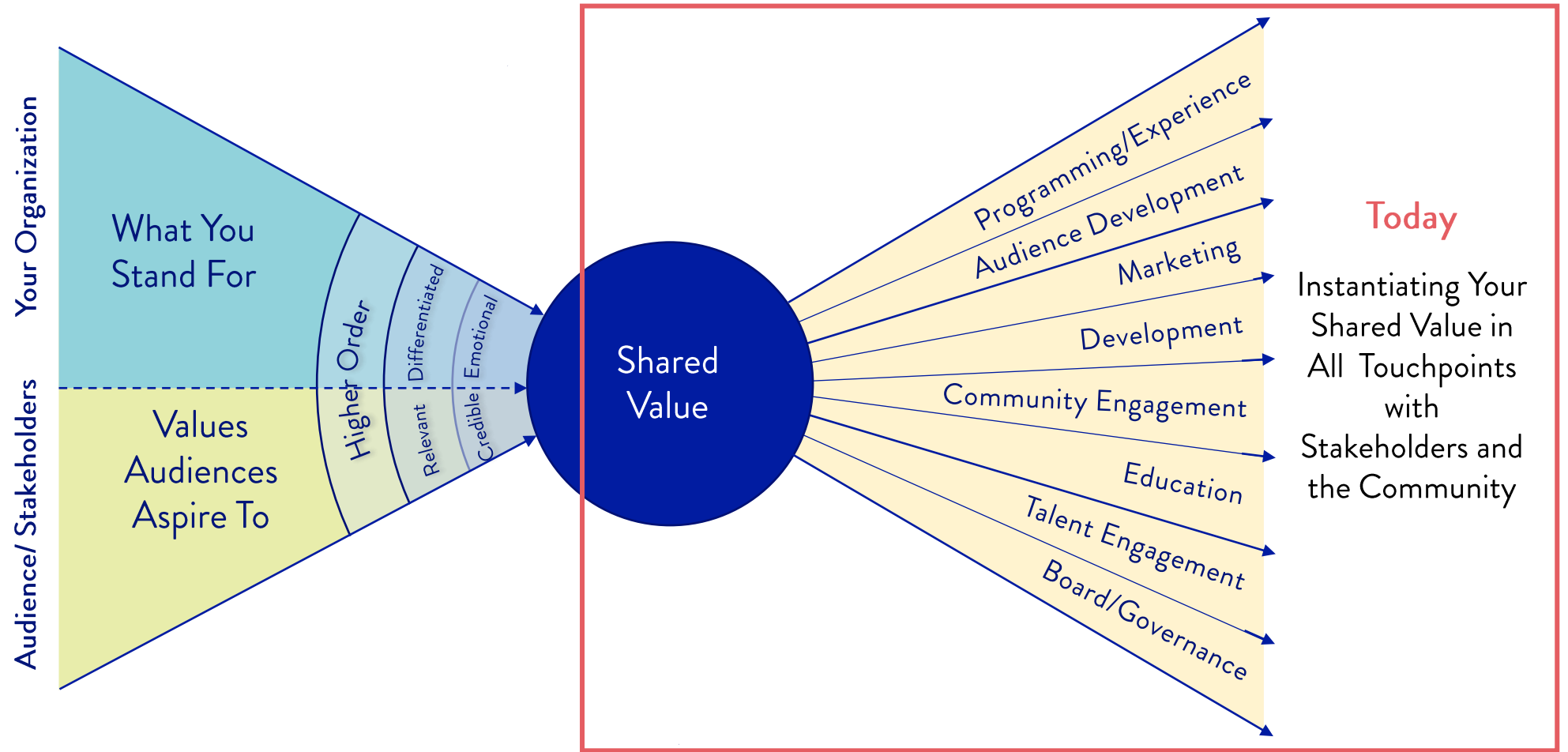
Embedding
Shared Values in
Audience and
Community
Outreach

03

Next Steps
and Overview
of ABA
Support

Building the Purpose-Driven Arts Organization

Wednesday
Articulating Your Shared Value as a Higher-Order Benefit That Audiences Value



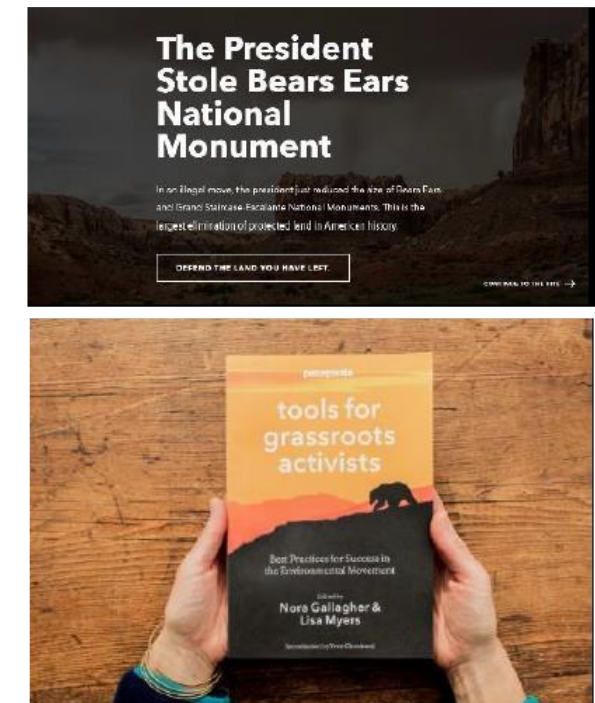
Patagonia Lives Its Values



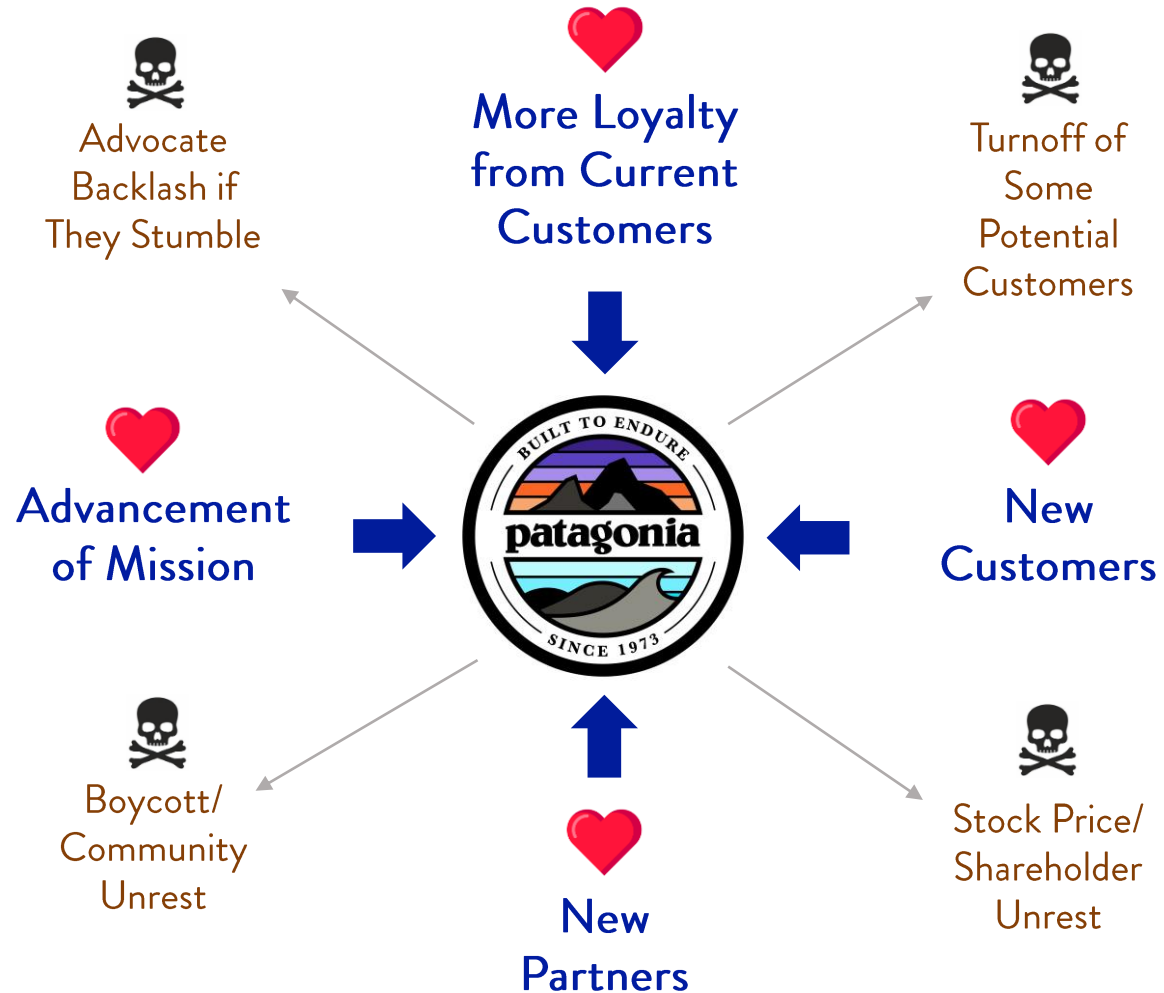
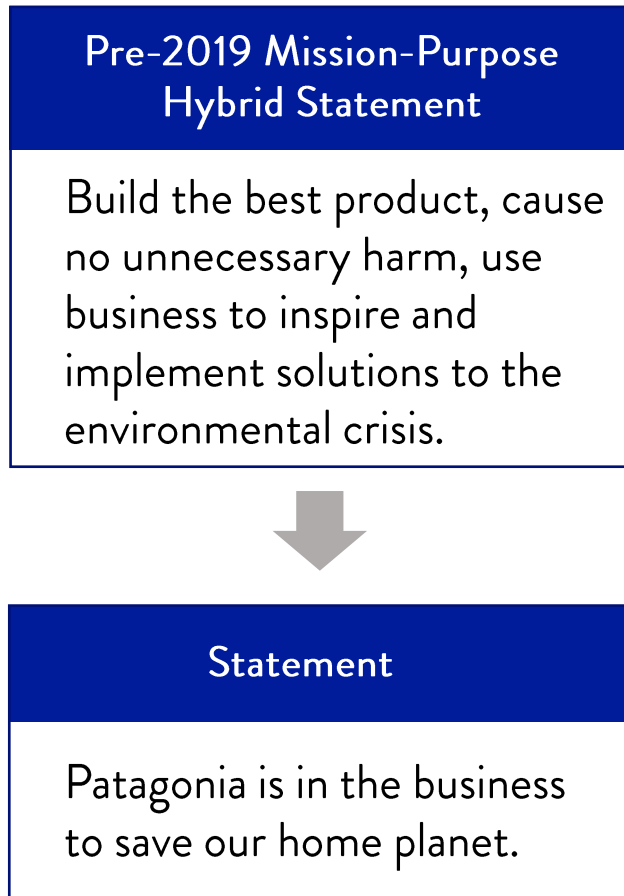
Advertising promotes 'sustainability' message over the company's near-term revenue interests...



...and its partnerships promote an overtly political message.



An Approach with Clear Risks and Tradeoffs



What's in the Way of a Shared-Values Approach?

Not Sure I Can Get To a Single Shared Value

How can I serve different audiences with one shared value?

Not Sure I Should Get To a Single Shared Value Even if I Could

Will my shared value turn away crucial stakeholders?

Not Sure I Should Undertake an Initiative Like This Right Now

Can I afford to make room for this on my current priority list?

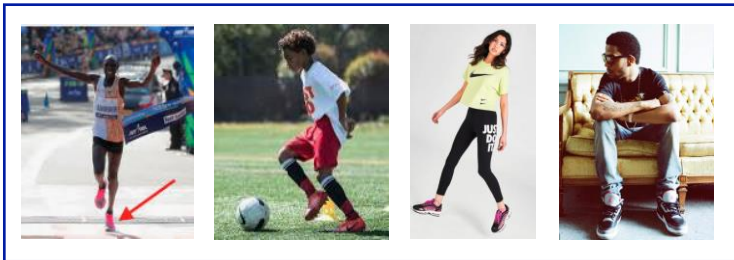
I Want To Do This, But I'm Not Sure How

How can I get the most benefit as quickly as possible?

Nike Serves Many Different Audiences with a Single Shared Value



While Nike is going after a wide range of segments...



... it's able to convey a single shared value that resonates most where its growth opportunity is greatest...

“We believe that, if you have a body, then you are an athlete.”

...and found value in an even edgier articulation



	Elites	Amateur	Casuals	Lifestyle
Women				
Youth Athletes				
Runners				




Swoosh! Nike stock surges



Taking a Stand Need Not Be as Confrontational as Nike




“Thinking Small” at American Express



Purpose:
We believe that thriving small businesses are the key to an active and vibrant community.

Follow the movement

Find us on Instagram @shopsmall to keep up with all the latest #ShopSmall news and events.



Business

Bloomberg

Small Business Saturday Grows Up

Small Business Saturday, an AmEx invention, resonates with shoppers

By [John Tozzi](#)

November 26, 2012, 6:26 PM EST

115TH CONGRESS
2d SESSION

H. RES. 1144

Recognizing November 24, 2018, as “Small Business Saturday” and supporting efforts to increase awareness of the value of locally owned small businesses.

IN THE HOUSE OF REPRESENTATIVES
NOVEMBER 13, 2018

DETROIT

The Detroit News

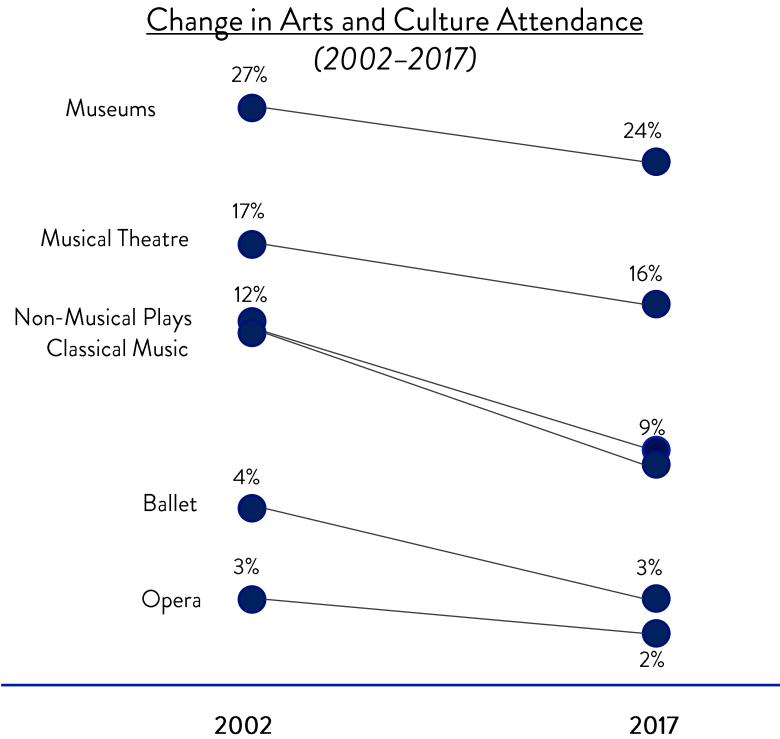
Black-owned shops showcased on Detroit's Small Business Saturday

Christine Ferretti The Detroit News

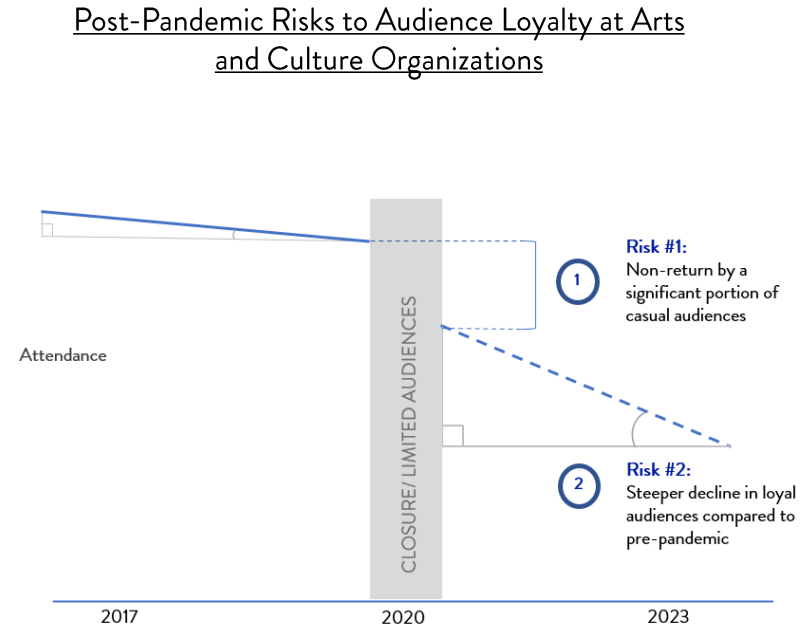
Published 12:47 p.m. ET Nov. 30, 2019 | Updated 3:00 p.m. ET Nov. 30, 2019

Appealing to Everyone Means You Appeal To No One

Arts Interest is Dropping



Subscriptions Are Falling



Arts Passionates Are Not Enough

Arts Motivational Segments Motivated Primarily By On-Stage Activity

33%: Arts Lovers

14%: Arts Passionates

19%: Quality Seekers

“...the United States is growing increasingly diverse with people who do not look, think or behave like traditional visitors to a cultural organization.”

*A 2016-2018 study measuring memberships and subscriptions across genres saw decreases at almost all types of organizations, with the greatest being an **11.4% drop in symphony orchestra subscriptions.***

Source: <https://www.colleendilen.com/2017/11/15/reach-likely-visitors-not-attending-cultural-organizations-data>; <https://www.pewresearch.org/fact-tank/2018/03/01/millennials-overtake-baby-boomers/>; [SMU DataArts](#)

To Evolve Your Brand, Take Your Community on a Journey



Corley Kenna
Director of Global
Communications and
Public Relations



Can brands evolve?

For brands that weren't socially conscious previously, is it too late to evolve?

“It’s really important that you not surprise your community. It can backfire when a company does something too unexpected and they don’t have the credibility. **To evolve your brand, you have to take your community on a journey with you...**

Then the brand should be transparent with their community about the problem and story tell around that. **Once that foundation is laid, you can present the coming changes in a much more authentic way.**

Patagonia donates 1% of their sales to grassroots environmental organizations (approximately \$20MM annually) and **spends more time advocating for environmental causes than they do marketing their own products.** And, their business continues to thrive as a result.

That’s pretty clear proof of the impact of an authentic brand purpose and why it is so critical for companies today to find theirs.”

Source: <https://www.forbes.com/sites/veronikasonsev/2019/11/27/patagonias-focus-on-its-brand-purpose-is-great-for-business/?sh=5524bb0054cb>

Activities Critical At Each Stage

Things You Can Do Right Away

Things That Require More Stakeholder Buy-In

Emotional marketing used as a tactic

- Emotional marketing – translating functional benefits into emotions
- Communicating existing education & community engagement to audiences
- Digital organized by themes with an emotional experience

Shared values as a societal brand promise

- Commitment to a single umbrella shared value message in marketing

Shared values as an aligned organization-wide strategy

- Consistency across organization to single umbrella shared value message
- Partnerships evaluated against shared values
- Staff exploration of shared values in engagement

Shared values as an organization-led movement

- Commitment to shared value in everything you do

It's Astonishing How Far We've Come



This year the San Francisco Symphony welcomes new Music Director Esa-Pekka Salonen and eight Collaborative Partners with a digital concert event that charts a new direction for the Orchestra.

The vibrant program includes music by Ellen Reid, John Adams, Kev Choice, and Ludwig van Beethoven, and is highlighted by the world premiere of Collaborative Partner Nico Muhly's *Throughline*, a San Francisco Symphony commission written specifically for a digital medium and filmed in locations around the world.

Throughline: San Francisco Symphony—From Hall to Home will broadcast locally in the Bay Area on November 14 at 7pm PST on KQED Public Television and simultaneously stream worldwide on this page, where it will remain for on-demand viewing.

ADD TO CALENDAR



San Francisco Symphony's "Throughline"

- Composed specifically for the virtual medium
- Created with 8 collaborative partners of Esa-Pekka Salonen
- Each partner has a solo, resulting in what sounds like a series of mini concertos, total 19 minutes of content
- Orchestra filmed in lengthy sessions at Davies Hall
- Soloists recorded remotely, though with the same high production values.

"No matter how we spin it, we are not an orchestra. We are a media house."

Esa-Pekka Salonen,
Music Director

Katie Kadarrauch, assistant principal violist, recording "Throughline."



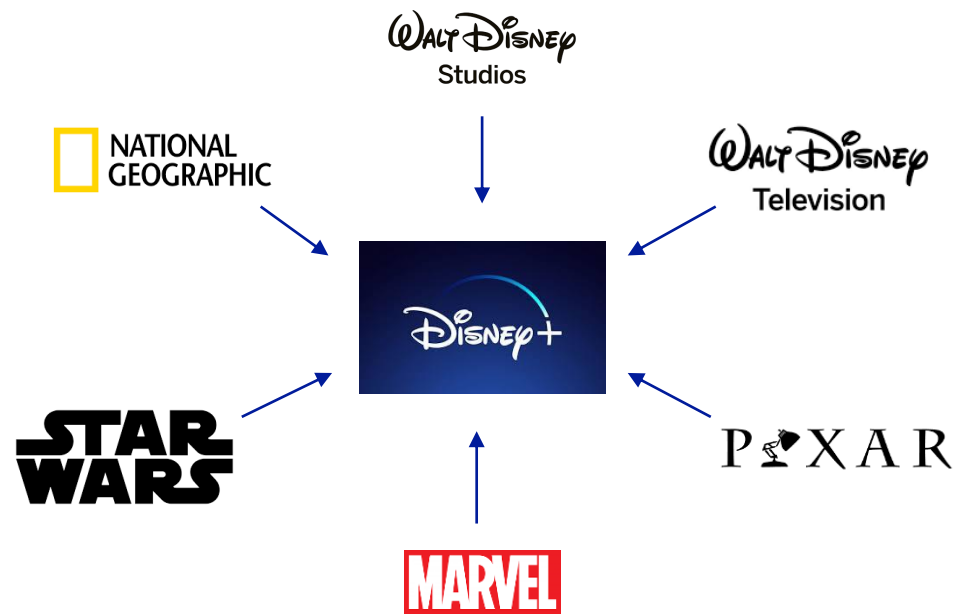
The soprano Julia Bullock recorded a song from Germany.



You Are (Probably) Not Disney Plus for the Arts

Overview of Disney +

- Subscription streaming service for content owned by Disney
- Focused on family entertainment
- 60+ million subscribers
- Seven of the top ten highest-grossing movies of all time



Attributes of Most Arts and Culture Organizations

- Limited archive of audience-worthy digital content
- Limited technology and in-house capabilities to produce audience worthy content
- Restricted access to artists for creation of new content
- Intermittent access to new/commissioned content
- Audience bases not used to consuming digitally
- An end-point where production resources are likely to once again focus primarily on in-person content

Context Gives Meaning: What Connects These?

Marilyn Monroe Memorabilia

One Wooden Ski



\$1,600

Prescription Bottle



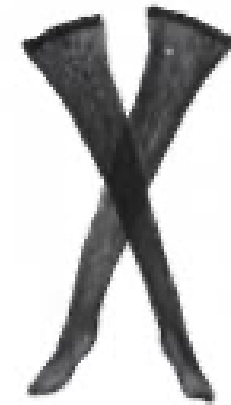
\$8,125

Old Magazines



\$10,625

Fishnet Stockings



\$15,625

Source: <https://www.julienslive.com/m/view-auctions/catalog/id/180/>

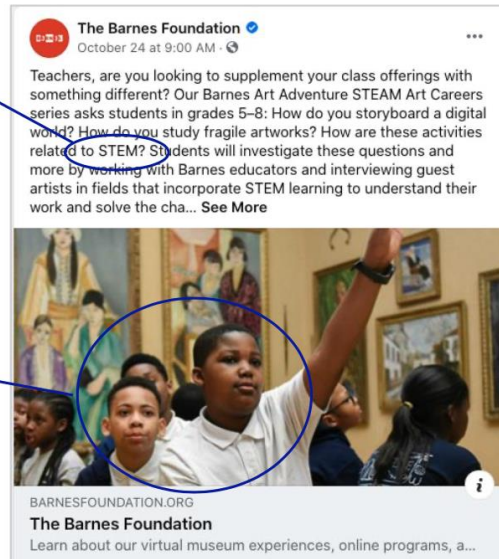
Barnes Signals Its Purpose in All Outreach

Foundation's Shared-Value Infuses Communications, Signaling Purpose Beyond Just Great Art

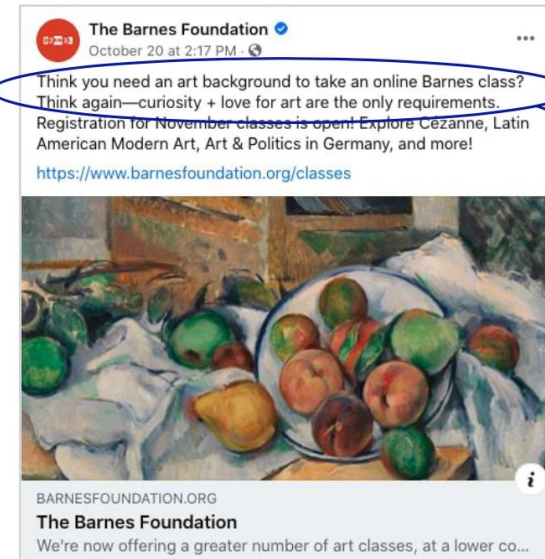
Targeting young people with an engaging entry point to STEM is right in line with the Dewey teaching philosophy that Barnes favored.

Barnes was anti-segregationist and left his art collection to a black university. The photographic choice reflects his desire to break down barriers to art appreciation.

Community Engagement



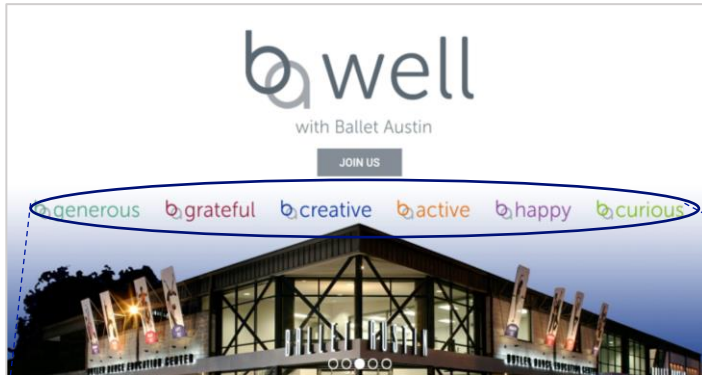
Audience Engagement



Explicit welcoming of newbies reflects Barnes' belief that in the value of democratized arts education.

Whereas others may see ordinary outreach, audiences and donors who know the Foundation's purpose feel more emotional connection when they see it manifested in the organization's outreach.

Ballet Austin: A Common Thread Ties Content Together

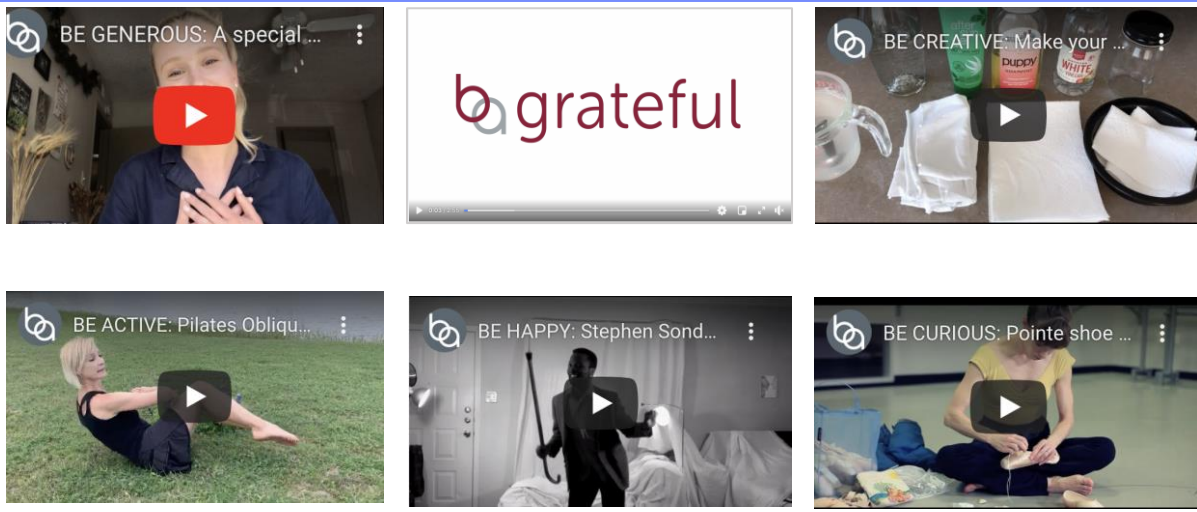


Our mission is to involve and strengthen our community through the creation and experience of dance and the encouragement of health and well-being.

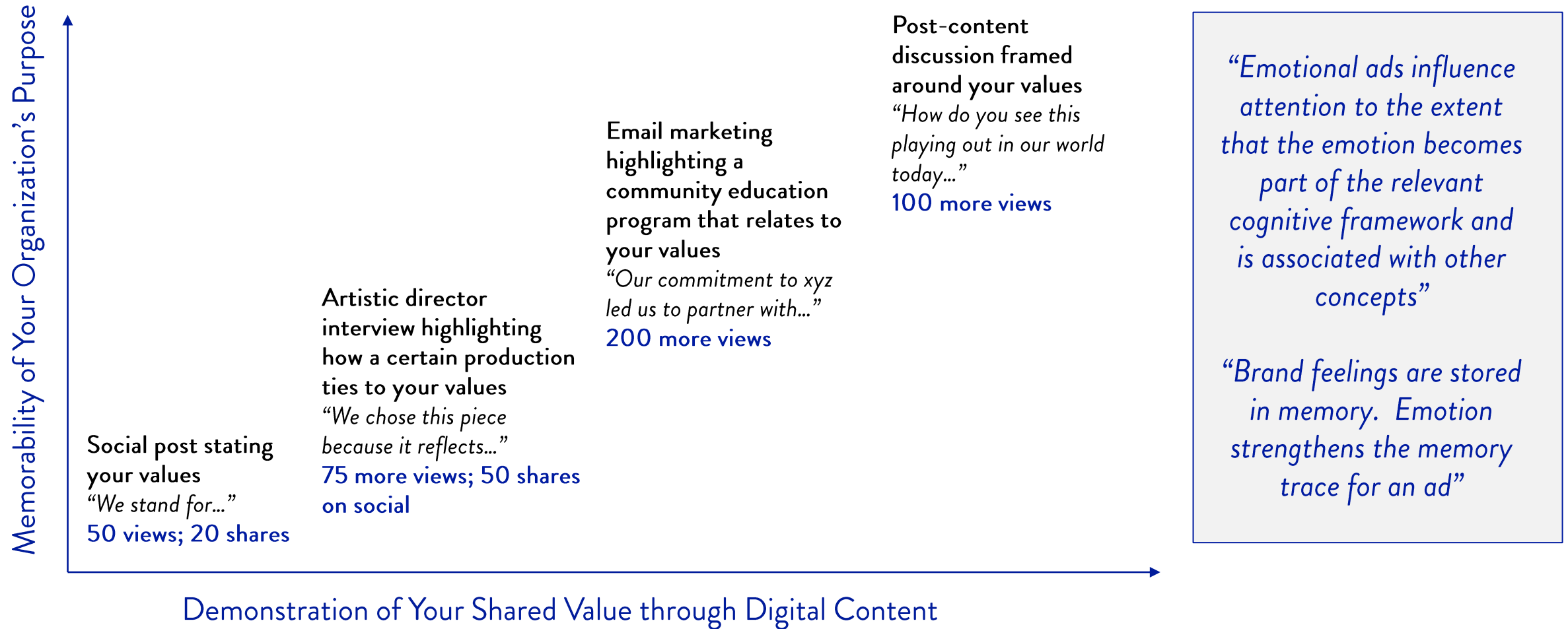
Helping you stay active, creative, curious, generous, and happy is our top priority every day! Connect with us virtually until we can be together in person, and help us share the joy of dance with our community and the world around us.

Click on the bars below to access engaging and interactive multi-media content that will keep you moving, thinking, and smiling. And as you enjoy this content, please consider a gift to Ballet Austin so we can come back to the stage and studio after these challenging times stronger than ever.

Content is cast in terms of personal benefits to site visitors



Thematic Reinforcement of Values Increases Memorability



Source: Brand Equity & Advertising: Advertising's Role in Building Strong Brands. Aaker, Biel, 2013.

Boosting the Signal Value of Digital

Not (Just)...

Remind “the faithful” we exist

Create world-class content

Focus on artistic integrity of each piece of content

Communicate artistic value of what we create

Tell supporters what we need



But (Also)...

Draw non-“arts lovers” in

Curate thematically relevant content

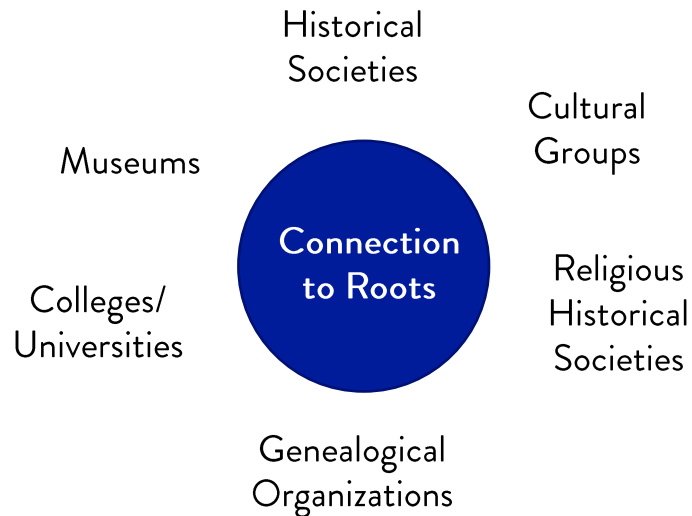
Focus on emotional resonance against the theme

Communicate usefulness of content in helping audience make progress in “struggling moments”

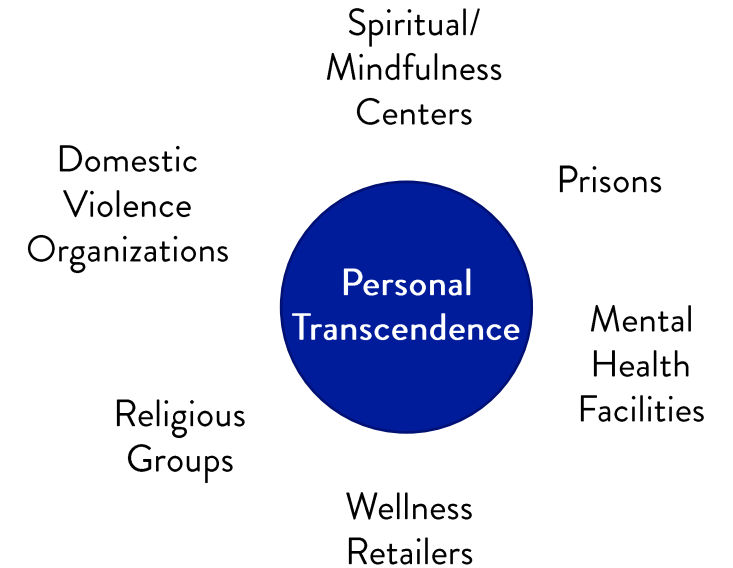
Tell the community what we stand for

A Tale of Two Arts Organizations

The community ecosystem you build should depend on what you stand for



- How does your partner ecosystem reflect what you stand for as an organization?
- Does your community-engagement behavior naturally attract partners with the same values?
- How would we project authenticity around shared values to a new partner we are trying to engage?
- Do the clarity of your values help you decide which potential partners to say “no” to?



A Clear Through Line at Woolly



CONNECTIVITY CORE PARTNERS

Connectivity Core Partners are long-term mutually beneficial relationships with organizations who share the same values around inclusion, anti-racism, social justice, and the power of art. These core partnerships will allow both parties to accomplish together what neither could do alone.

Inaugural Partners:

Howard University College of Fine Arts

Howard's Professor Ruffin on Woolly Partnership



N-Street Village and Theatre Lab

N St. Village and The Theatre Lab co-founders discuss what makes this partnership unique



THEARC

THEARC Alums Talk About Their Woolly Experience



SPIT DAT

Hear from Dwayne B! about the history between Spit Dat and Woolly.



“The Core Partner Program is a natural outgrowth of Woolly’s mission to deeply engage with our world, and desire to practice radical inclusion. Stemming from the impulse to be of service and honor community needs, the Core Partner program represents one of the many ways Woolly Mammoth can be part of the solution for how we heal in the midst of this collective community trauma.” –Woolly Mammoth Connectivity Director, Kristen Jackson

A New Lens for Assessing the Value of Partnerships

Questions To Evaluate “Shared Values” Potential Partnerships

Traditional Partnership-Evaluation Questions

- By how much does the partnership increase exposure to our arts genre?
- Is the partnership innovative in our field?
- Does the partnership appeal to known sources of funding?
- Are we equipping people to appreciate our arts genre in the future?

Cross-Organizational Alignment

Does the potential partner have the same or complementary values?

Does the organization have some capability or access to audiences that we don't?

Can we both do better at advancing our shared value by working together?

Impact on Audience Progress against Shared Value

How many people will we be able to reach directly or enable our partner to reach through our partnership?

How many people will this partnership equip to advance our shared value?

How will this partnership improve the ability of people to make progress against our shared value?

Signal Value

Can our partner meaningfully boost our association with this shared value (or vice versa)?

Will our organizations' constituencies view this partnership as an authentic advancement of our shared value?

Does our partnership make it clearer to people what both we and our partner stand for?

Ben & Jerry's Talk about How To Start a Movement

PURPOSE—Your Core Values

Business Activism is not driven by the values of your customers or the issues they care about. It is driven by the values of your brand and the things that you and your company care about. Why does your company exist, and what are your core values? Be clear about your values—make sure they are rooted in something real and that they can stand the test of time.

POLICY—Tangible Change

Stand for real policy changes that address the root cause of issues. Don't pursue empty actions that don't support and align with larger movements. Be transparent and be direct in this ask with your customers to bring them along.

PEOPLE—Of the Movement

Your employees must truly believe in and be connected to the issues and the movements you aim to support. They must be passionate about creating change. This work cannot be wholly outsourced to agencies.

POWER—Resources

Businesses have immense power and influence over policymakers, the media, and consumers. This includes expertise in consumer research, performance marketing, world-class creative development, and big budgets. Let's leverage all of that to better the world, not just sell more stuff.

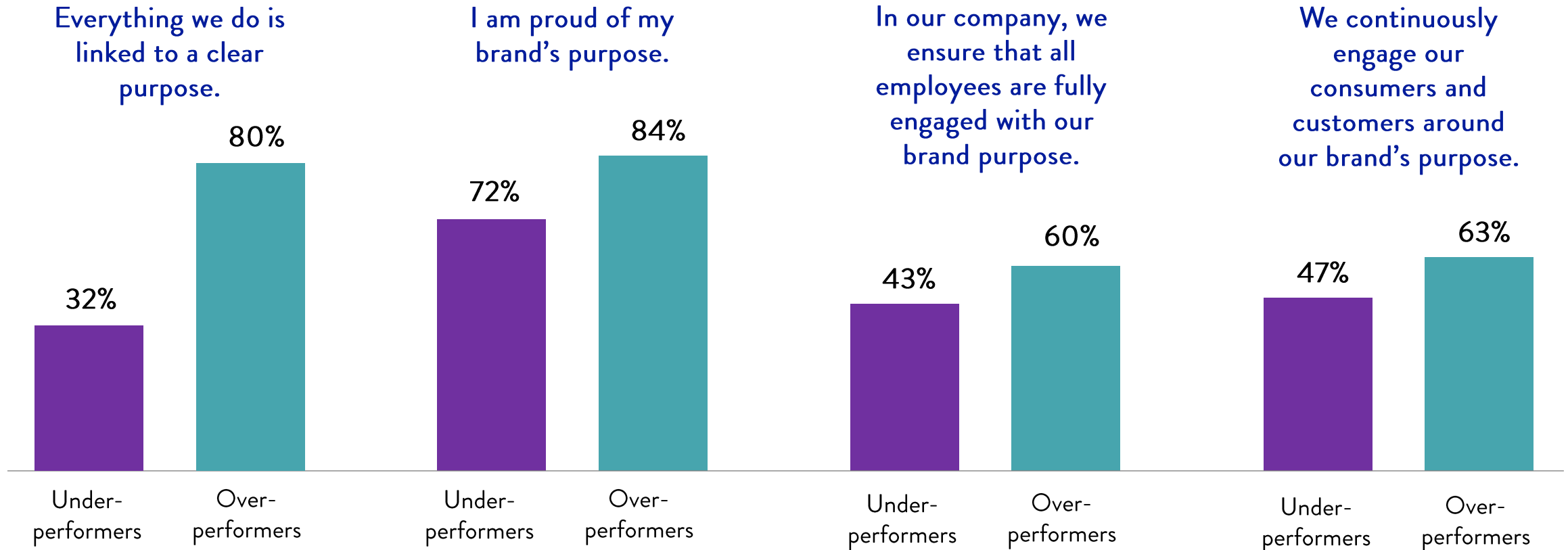
PUBLISHING—Storytelling

Use your voice and your consumer touch-points for ongoing storytelling and creative content that brings your consumers into these movements. Offer an easy onramp to participation, such as signing a petition or joining a march.

POP CULTURE—Relevancy

Use your brand positioning and tone to cut through the cluttered media landscape. Your connection with your consumers can help you drive them to movements, and your support of movements can make your brand relevant and top of mind.

Your Employees Are a Shared-Values Asset



Source: Igniting Purpose-Led Growth, Kantar Consulting.

Shell's Transformation to a Purpose-Driven Organization



Rahul Malhotra

Head of Brand Strategy and Stewardship
Shell Oil

To arrive at our purpose, we reached out to 600 employees from Australia to Brazil in a wide cross-section of positions... We asked them two simple questions:

“Why did you join Shell?”

“When you retire, what will you leave behind as a result of your work here?”

The Shell Purpose Playbook: I Get It, I Love It, I Live It

“The questions you really have to ask are:

Are my business choices and strategic tradeoffs reflecting my purpose?

Do my customers and employees feel my purpose in every interaction?

If I ask a random employee about our culture, they should respond that we are driven to pursue our purpose.”

“Marketing must inspire both internally and externally. Marketers must be that glue that connects the organization to its purpose. Marketers must ensure that every touchpoint is oozing with purpose... I'd say that marketing needs to be the chief advocate for purpose across the organization.”

Source: http://the-internationalists.com/trendsetters/Trendsetter_6-18-2020-more.html

The Power of Stories



Salmon Stories

Costco's buyers were able to obtain higher quality salmon at a lower price, which they passed on to customers. The lower price yielded a bump in sales, and the buyers were twice more able to negotiate lower prices for even higher quality salmon.



Proof Points

Similar stories within Costco are now known as “salmon stories.” The company gives out Salmon awards to recognize individuals who have acted on the “salmon” example, which lies at the center of Costco’s identity. These stories offer culture strengthening “proof points” inside and outside of the organization.

A Movement Starts with Your Staff

Soliciting Purpose Stories

WHAT IS YOUR RED VEST MOMENT?

You may or may not wear a red vest every day, but if you work at Lowe's, there's a good chance you've had a red vest moment. It's one of those times you realize that what we do is so much more than sell home improvement products. Red vest moments happen when we make a meaningful impact in someone's life.

[Read Red Vest Moments >](#)

[Share Your Moment >](#)

Share Your Red Vest Moment

Make sure to include the important stuff. How did it make a difference in a customer's day, or life? How did it make you feel? How did it change the way you think about your work?

First Name:

Last Name:

Email:

Location:

[Attach a file](#)

If you have a picture or video, share it too.

[SUBMIT YOUR MOMENT](#)

Internal Description of 'Red Vest' Moment

RED VEST MOMENTS

- Examples of employees demonstrating our purpose by engaging in specific behaviors that help people love where they live.
- Can be an extraordinary task, but doesn't have to be.
- Involves interactions with customers and/or communities, not other employees.
- Strikes an emotional note that the reader can see and feel.

Lone Teenager Vows Climate Strike until Elections

From this...

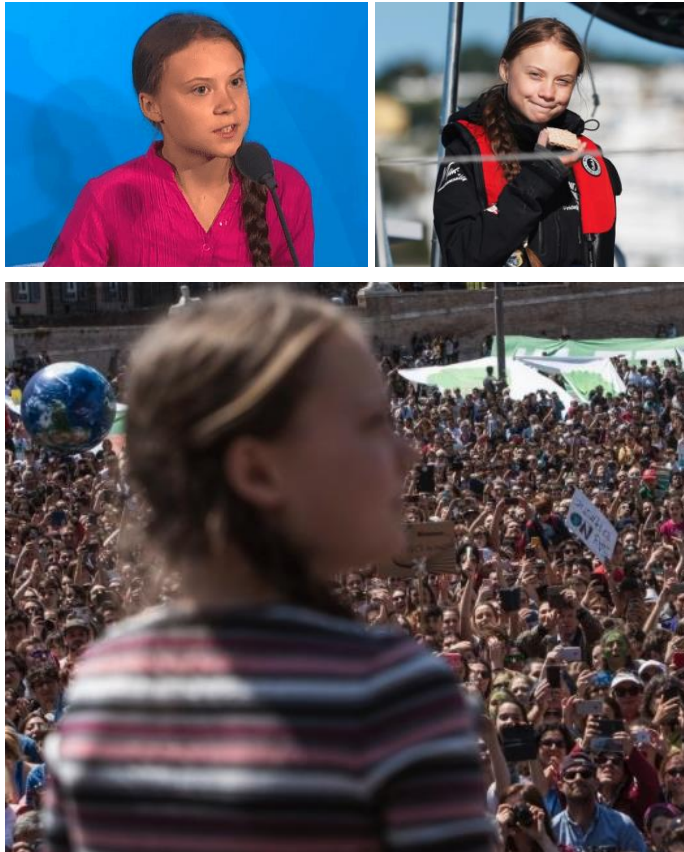
August 20, 2018

Solitary ninth grader with hand-painted sign strikes outside Swedish parliament for 21 days



“I thought I couldn’t make a difference because I was too small.”

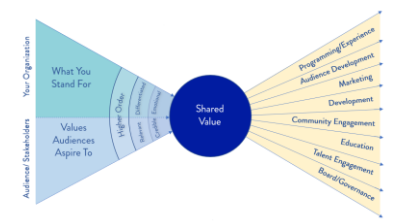
...to this...



...to this



There Are Easy Things To Do To Get Started



Developing and Communicating Your Shared Value

Understanding Your Purpose

- Re-examine your origin story: does it give you clues about your purpose?
- Look at your mission, vision and values and see if it is clear why that vision should come to pass
- Ask staff what they think you stand for. Who do we attract and why?
- Gather stories that are meaningful for staff about your history

Listening to Audiences

- Try the ZMET/ '5 why' technique with some team members. Have them bring in pictures and write down the values revealed
- Review current audience feedback mechanisms; is there an opportunity for them to tell you what is differentiating?
- Use Utah Symphony's values map as a start – what stands out as relevant and differentiating for you?

Honing Your Shared Values Statement

- Test any value against the five components of a shared value statement
- Identify tensions underlying audience achievement of any value you highlight.
- Take any message and tell it in a story of emotional tension and release
- Translate any value into personal benefit when using it in messaging

Boosting Digital Signal Value

- Identify a values 'theme' for each digital content you offer
- Write down your 'rules' for curating content from others, especially related to values
- Communicate your community engagement activities to current audiences
- Check each communication: are we appealing to audience emotion?

Living Your Values

Enabling Value-Led Partnerships

- Write a statement of partnership values
- Look at current partnerships – is the through line clear?
- Start to build relationships with community groups that represent your key values
- Review partnerships – are they providing legitimacy to your value or are you providing support to them?
- Consider unexpected partnerships or community efforts that have strong signal value

Empowering Stakeholder Advocates

- Ask staff: why did you join? What legacy do you hope to have before you leave?
- Encourage story-telling among your staff about where they have seen your purpose brought to life.
- Collect those stories of value delivery from staff and community partners and share with audiences

The Important Thing Is To Begin To Move Forward

Things You Can Do Right Away

Things That Require More Stakeholder Buy-In

Emotional marketing used as a tactic

- Emotional marketing – translating functional benefits into emotions
- Communicating existing education & community engagement to audiences
- Digital organized by themes with an emotional experience

Shared values as a societal brand promise

- Commitment to a single umbrella shared value message in marketing

Shared values as an aligned organization-wide strategy

- Consistency across organization to single umbrella shared value message
- Partnerships evaluated against shared values
- Staff exploration of shared values in engagement

Shared values as an organization-led movement

- Commitment to shared value in everything you do

Key Takeaways From the Summit

- Our ability to recover quickly and sustainably from the pandemic depends on our ability to bring back not-yet-loyal audiences back to our venues when it's safe.
- There's a clear lesson from consumer brands about how to increase the loyalty of casual buyers—emotional differentiation.
- The most intense form of emotional differentiation, and therefore the most successful at building loyalty, is connection around shared values that both we and our audiences both believe to be part of “who we are.”
- Anything we can do right now to connect emotionally and communicate the impact of our community engagement efforts to audiences represents an advance over our current programming-dominant approach
- That said, the biggest benefits come when our work transcends marketing, and we become known in the market as a champion for a higher-order shared value whom audiences can rely on to help them make progress in their lives
- Now is an especially opportune time to get going, both because of the urgency of our need, the void left by lack of in-person programming, and the range of emotional needs that exist for audiences in quarantine

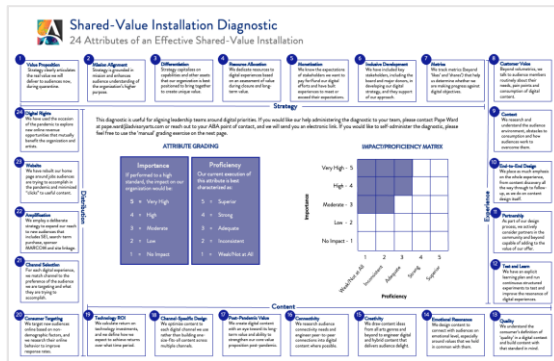
How We Will Support You

Tools

Workshops

Data/Analytics

Diagnostics



Share Values Readiness Assessment

Shared Values Workshop 3: "We Believe..." Putting it All Together

Shared Values Workshop 2: Values Your Audiences Aspire To

Shared Values Workshop 1: What You Stand For

While we start with the internal values the organization already holds, the real magic of Shared Values

Description:

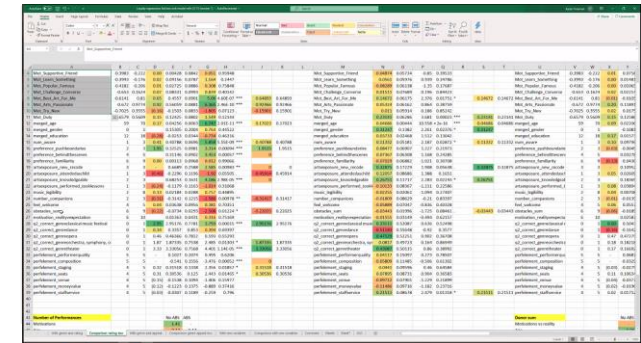
- Mining your origin story and institution history for unique elements and values.
- Credibility Test: Examining your past productions/exhibitions, events, marketing, community engagement, and more to evaluate how well your organization has embodied potential values in the past.
- Differentiation Screen: Assessing potential values against what other arts organizations in your genre and geography might offer.

Format: 2-hour interactive team workshop

Output: 2-3 potential internal values

Next Steps: Audience value insights gathering

Quantitative Analysis



Checklists

What You Can Do Next Week

Developing and Communicating Your Shared Value

- Understanding Your Purpose**
 - Re-examine your origin story: does it give you clues about your purpose?
 - Look at your mission, vision and values and see if it is clear why that vision should come to pass.
 - Ask staff what they think you stand for: Who do we attract and why?
 - Gather stories that are meaningful for staff about your history.
- Listening to Audiences**
 - Try the ZMET (5 why) technique with some team members. Have them bring in pictures and write down the values revealed.
 - Review current audience feedback mechanisms to have an opportunity for them to tell you what is differentiating?
 - Use Dick Springfield's values map as a start - what stands out as relevant and differentiating for you?
- Having Your Shared Value Statement**
 - Test any value against the five components of a shared value statement.
 - Identify tensions underlying audience achievement of any value you highlight and tell it in a story of emotional tension and release.
 - Translate any value into personal benefits when using it in messaging.
- Boosting Digital Signal Value**
 - Identify a value shared for each digital content you offer.
 - Write down your value for curating content from others, especially related to value.
 - Communicate your community engagement activities to current audiences.
 - Check each communication and see appealing to audience emotion?
- Enabling Value-Led Partnerships**
 - Write a statement of partnership values.
 - Look at current partnerships - is the through line clear?
 - Start to build relationships with community groups that represent your key values.
 - Review partnerships - are they providing legitimacy for your value or are you providing support to them?
 - Consider unexpected partnerships or community efforts that have strong signal value.
- Empowering Stakeholder Advocates**
 - Ask staff: why did you join? What legacy do you hope to have before you leave?
 - Encourage storytelling among your staff about where they have seen your purpose brought to life.
 - Collect these stories of value delivery from staff and community partners and share with audiences.

Living Your Values

Motivational Segment Descriptions

The Eight Motivational Segments in the Arts

Amiable Followers Willing Companions Motivation: Support friends and family Values: Excellence 9% of audiences	Community Appreciators Civic Stewards Motivation: Create vibrant community. Fulfill duty toward the arts. Values: Being Bold, making a difference, involvement in community, family 16% of Audiences	Personal Developers Mastery Builders Motivation: gain expertise Values: Personal growth 13% of audiences	Arts Lovers Arts Passionates Motivation: Pursue a passion (not a special occasion or shared memory) Values: Compassion, enthusiasm, creativity 14% of audiences
Culture Surfers Motivation: Get Inspired, Follow Trends Values: Honor, enthusiasm 9% of Audiences	Social Samplers Motivation: Try something new. Get purpose a passion. Values: Independence, patience, being 12% of Audiences	Conversational Challengers Motivations: conversations, challenge preconceptions (not art at the highest quality) Values: Curiosity, flexibility, competence, ethics 14% of audiences	Quality Seekers Motivations: see art at the highest quality (not to show others or create a shared memory) Values: Excellence, balance 19% of audiences

- *Primer: Understanding Shared Values*
- *Workshop #1: Determining What You Stand For*
- *Workshop #2: Aspirational Values of Your Audiences*
- *Workshop #3: Distilling a Shared Values Statement*

Overview of Our Upcoming Donor Work

Redefining the Donor Value Proposition

The pandemic has accelerated the long-term attrition of donors from the arts and redirection of philanthropy toward safety-net causes.

To meet contributed-income needs in the pandemic and beyond, arts organizations must redefine the value they bring in terms that align with changing donor motivations

At the same time, they must find a way to wean high-potential donors from giving based primarily on transactional benefits.

Accomplishing this task requires deeper understanding of high-potential donor motivations and the ability to assess motivations at scale, without first developing individual relationships.



Donor Interviews

Motivations for giving in the pandemic

Making choices among philanthropic priorities

Perceived value of various donor benefits

Perceptions of arts and culture organizations

Evaluation of best and worst not-for-profit pitches



Quantitative Survey

Giving frequency and level

Motivations for giving

Philanthropic mindset vs. transactional mindset

Decision factors in allocating philanthropic funds

Perceived value of various donor benefits



Best Practices

Identifying donors who value your organizational purpose

Building experiences that resonate with target donors

Creating a case for support that stands up against safety-net priorities

Organizing your outreach to optimize coverage of high-potential donors