

LITERARY ARTS

STRATEGIC FRAMEWORK

PROGRAM ASSESSMENT

2019-2022



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COVER PHOTO: 2018 Oregon Book Awards winner Samiya Bashir performs at the Literary Arts space during Lit Crawl® Portland, the official kick off party for the 2018 Portland Book Festival.

INTRODUCTION

This document, created in June 2018, represents an assessment of the programs and functions of Literary Arts and is meant as a supporting document to the Strategic Framework.

The staff of Literary Arts were asked to write about their work under three headings:

- 1. Landscape:** This is an assessment of the current operating environment relevant to their work.
- 2. Current Platform:** This is an assessment of the relevant program or function as it operates today.
- 3. Next Evolution:** This is a general description of how the relevant program or function will evolve over the next three years.

This assessment forms the basis for the framework and gives our community members a chance to take a deeper look at specific programs and functions of Literary Arts.

PORTLAND ARTS & LECTURES AND SPECIAL EVENTS¹

Landscape

There have been relatively few changes in the presenting landscape of Portland since our last assessment. There are still many lecture series in the city, including the [WorldOregon](#) (formerly the World Affairs Council of Oregon), the [Linus Pauling Memorial Lectures](#), the [Voices Lecture Series](#), the [Mark O. Hatfield Lecture Series](#), and the [Brain Awareness Lectures](#). Portland Arts & Lectures remains the only subscription series with an emphasis on literary speakers. While many series have come and gone over the years (e.g., the Illahee Lecture Series, mentioned in the last assessment, ceased producing events in 2015), Portland Arts & Lectures is perhaps the oldest and most consistent series in the city.

Furthermore, there are dozens of literary reading series and stand-alone events, including Powell's in-store and off-site events (typically at the Newmark Theatre in the Portland's complex or at Revolution Hall), which are occasionally hour-long talks or conversations rather than readings. At these off-site events, the ticket charge is typically the cost of the hardcover book plus the production cost (\$32–\$37), which is on par with ticket prices for Portland Arts & Lectures and our Special Events, though we also offer both lower- and higher-priced seats. In general, the competition that matters is in the securing of the speaker rather than competing for audience; however, having a robust arts ecosystem helps elevate literature in the city and perhaps ultimately helps stir interest in Portland Arts & Lectures. Collaboration between Literary Arts and Powell's is event-specific, and whenever we book bundle, we do so through Powell's.

We have also seen a number of live storytelling groups established in the city, including Back Fence PDX and Portland Story Theater. Literary Arts helped launch The Moth in Portland, both with the Mainstage shows and the StorySLAMs.

In addition, major national production companies such as Clear Channel, the Unique Lives series, and Broadway Across America are producing celebrity authors and others (David Sedaris, Ira Glass, etc.) at major venues such as the Keller Auditorium and the Arlene Schnitzer Concert Hall.

¹ Special Events are stand-alone events and not part of the Portland Arts & Lectures subscription package.

Though publicity departments have been cutting budgets for book tours, the book tour remains an important tool for publishers to gain visibility for their writers. Increasingly, we see publishers insisting on book bundles² for their most well-known writers. Publishers are extremely focused on short-term book sales, so while The Archive Project has a large audience, it is not a selling point for publishers.

It should be noted that Portland Arts & Lectures and our Special Events do not represent the totality of our presenting as they once did. Since 2011, we have presented a robust and growing number of events in our space under the umbrella “@LiteraryArts.” Additionally, in 2014, we acquired Wordstock (now the Portland Book Festival), relaunching the festival in 2015 (see the Portland Book Festival section of this assessment).

Nationally, independent booksellers are resurging.³ This may have to do with the collapse of Borders, the slow decline of Barnes & Noble, and a flattening e-book marketplace. This is to be celebrated for a variety of reasons, but from our perspective it is most valuable in that it brings more and stronger potential partners into the ecosystem.

An additional challenge is that speaking fees have little rationale and vary wildly depending on the relative fame of the speaker, audience size, perceived mission, the author’s relationship to the host organization, and author needs. Generally over the past 20 years, private universities and blue-chip corporations have aggressively competed for authors and consequently have bid up fees. These two groups often have very deep pockets relative to Literary Arts and other community organizations, with no need to directly recoup their losses; they often do not even sell tickets.

Despite the fact that the lectures, readings, and talks of many well-known authors are widely available and free on the internet, the hunger for a live event and collective experience continues to be strong.

2 Book bundles are when an event ticket includes admission to the event and a copy of a book. Venues can have all or a section of the seats come with a book. (The latter allows for a variety of ticket prices.)

3 <http://www.bookweb.org/news/indies-believe-they-are-better-positioned-chains-weather-amazon%E2%80%99s-growth-102255>; <https://www.npr.org/2018/03/29/598053563/why-the-number-of-independent-bookstores-increased-during-the-retail-apocalypse>

In terms of equity, there are significant historic inequities in the publishing industry leading to a predominance of books published by white men and greater marketing and publicity dollars directed to their titles.⁴ This makes booking a diverse series of events a challenge when working in a large venue. Looking even further upstream, it is worth noting that MFA programs are dominated by white students, as is enrollment in liberal arts programs at the undergraduate level.⁵

Finally, Portland has become a culturally rich place with many choices for its citizens. This is a wonderful problem to have, but it does pose some challenges for all arts programmers in terms of competing for people's time.

Current Platform

PORTLAND ARTS & LECTURES

Portland Arts & Lectures (PA&L) is a subscription-only series. To our knowledge, it is the largest “live-audience” literary series in the nation at 2,492 subscribers.

The 2007–2008 season had the lowest number of subscribers in recent history at 1,515. Since then, the number of subscribers has steadily grown and has now stabilized around 2,400, which is essentially sold out (due to our use of the remaining 300 seats for sponsors, students, and community development or outreach partners). Therefore, in a highly competitive cultural marketplace, PA&L remains relevant and vital to a large audience.

4 https://broadly.vice.com/en_us/article/9aex3p/read-between-the-racism-the-serious-lack-of-diversity-in-book-publishing

5 <https://www.theroot.com/if-we-want-diverse-books-we-need-diverse-mfa-programs-1790876994>

In bucking both national and local trends that are eroding subscriptions in single tickets or “create your own” subscriptions so dramatically,⁶ it is difficult to say how long the subscription model is sustainable. However, it is our belief that in building a subscriber base that is proud of its participation and has a sense of being a part of something larger, we could create a permanent anomaly that is closely identified with being a Portlander. Consider that subscribers recently donated a total of \$20,000 to the Students to the Schnitz program in 2017 as evidence of a greater awareness of our broader mission.

A perennial concern is whether the strict subscription model of PA&L can be sustained in an age in which cultural offerings are increasingly à la carte and younger generations expect more choice. Does this impose a barrier for younger people to participate in Portland Arts & Lectures? For audience members from lower socioeconomic communities? Can we graduate people from buying single tickets at our Special Events to subscribing to the series?

In addition, PA&L, along with many of our other events, has found an even larger audience on The Archive Project. The radio show and podcast has radically extended our reach in terms of numbers and, being a totally free and statewide asset, has helped further our mission (see The Archive Project section of this assessment).

The audience for PA&L and our Special Events remains overwhelmingly white when we look at who purchased tickets (as distinct from who is in the room). It is a place where we have made little to no progress in terms of diversity, equity, or inclusion. On the other hand, we have made some progress when we look at who our presenters have been. Over the past five years, 40% of our speakers have been women, and 40% have been people of color.

At the same time, we have increased access by providing free tickets and transportation to at least 600 Portland public high school students per season through Students to the Schnitz, and a pair of seats to all of the Oregon Book Awards finalists and fellowship recipients. We also make 800 community seats available to partner organizations (many of them are culturally specific, such as the Muslim Educational Trust, or serve historically marginalized constituencies, such as [the Immigrant and Refugee Community Organization](#)) and through the Multnomah

6 <http://www.trgarts.com/TRGInsights/Article/tabid/147/ArticleId/457/Your-Patrons-are-Guesting-You.aspx>

County Library's cultural passes program. In terms of ticket prices, we remain one of the most affordable series in the city, with Upper Balcony subscriptions starting at \$18 per lecture.

Our guest speakers participate in a robust day of activities that takes them out of the concert hall and into our community. A stay in Portland for our speakers typically includes a school visit, a meeting with local writers, an on-air interview with Oregon Public Broadcasting's *Think Out Loud*, a presentation in the concert hall, and a patron reception followed by a dinner with a mix of donors and other organizational friends. This is a compressed "writer in residence" model that is perhaps unique in the country.

PA&L functions as an important platform for our programs and the organization as a whole, giving valuable visibility to our less public work. Each year, a student performer opens one lecture, as does one Oregon Book Awards finalist or fellowship recipient. We have the opportunity to talk about our work from the podium, in the slides during the pre-show, and in the pages in the program. An emphasis is placed on diverse voices when showcasing the work of our other programs.

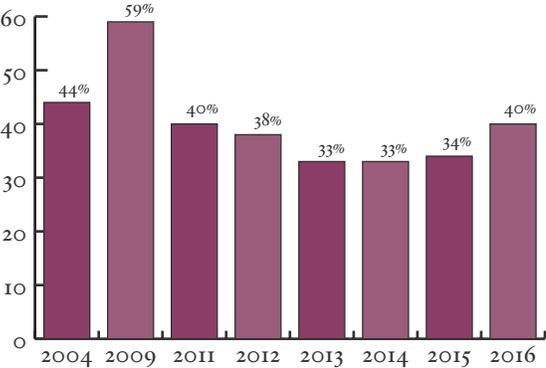
And finally, the series produces significant earned revenue. In the last three seasons, the program has produced on average approximately \$267,000 per year in positive contribution or about \$138,000 in surplus (after management and overhead).

Historically, program surpluses do not always correspond to years with high ticket sales, since speaker fees, marketing costs and effectiveness, and a host of environmental concerns play a large role in final net revenues. We know from survey data that celebrity authors are only partially important to our audience: 49% of the audience claim they would renew their PA&L subscription without knowing any of the authors in the forthcoming season, while an additional 12% tell us they need to recognize only one to two names in the lineup. This demonstrates strong brand loyalty.

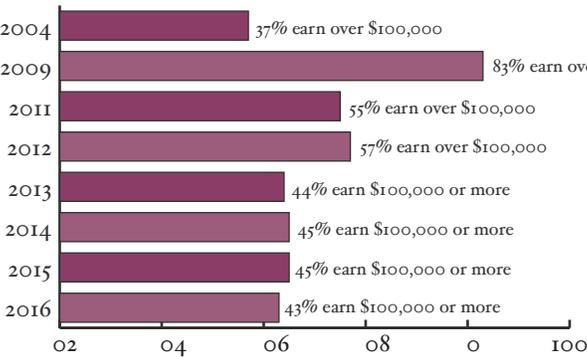
In the previous Literary Arts Strategic Plan, we provided some demographic information from 2004 and 2009. Below is an update with data collected since 2016.

AUDIENCE DEMOGRAPHICS

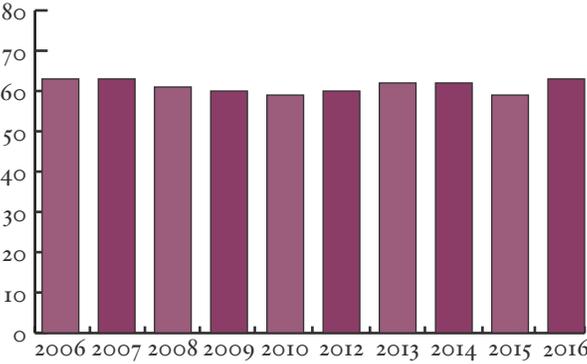
Education: Percentage of Subscribers with a Graduate Degree



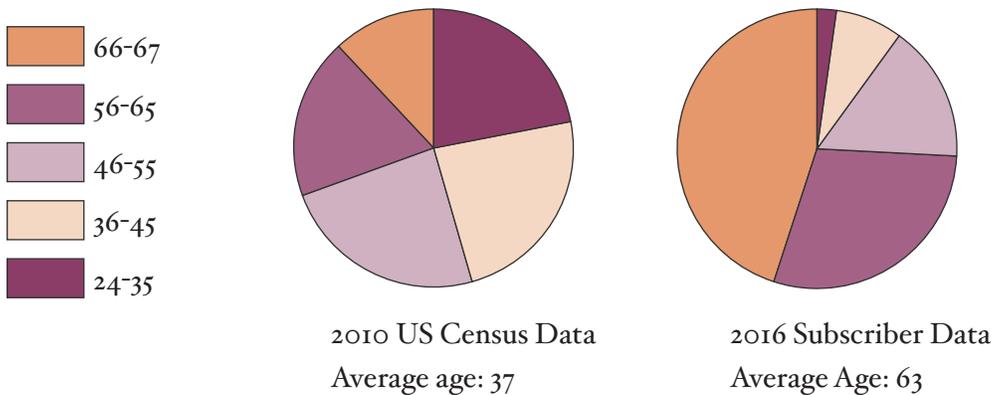
Yearly Income



Average Age



Age Compared to Census Data



The audience of PA&L is majority female and consistently 90%–95% white. This does not reflect the city we live in, which is 77.7% white, 7.6% Asian, 5.7% black or African American, 0.7% American Indian and Alaska Native, 0.6% Pacific Islander or Native Hawaiian, and 5.2% identifying as two or more races; 9.7% are Hispanic or Latino, of any race or ethnicity, and whites not of Hispanic origin made up 71.6% of the total population.⁷

What is clear from this data is that the audience demographics are remarkably stable, which is consistent with a model that is subscription-only and has a high renewal rate.

Not included in the statistics above are the 1,500 students we bring to the Schnitz each year, nor those who sit in the hundreds of comp seats we provide to our community partners. There is also the audience we now reach outside the concert hall via radio broadcasts and podcasts and through the community engagement in which most of our speakers participate. Taken together with the live audiences, this is whom PA&L and our Special Events serve. So far, we have not found a way to account fully for the demographics of the program, aside from those individuals who purchased tickets (i.e., we do not know with whom those ticket buyers attend the event if they bought seats for a group).

⁷ <https://www.census.gov/quickfacts/fact/table/portlandcityoregon/PST045217>

What has made the series successful is a difficult question to answer, but here are some general explanations that remain true from the last assessment:

Format: There are hundreds of readings in Portland, but relatively few offer original talks of the quality we consistently provide.

Strong brand: The series has been remarkably consistent in terms of curation, thereby garnering a loyal and trusting audience.

Mission: The series has a sense of purpose beyond entertainment through the artist-in-residence model.

Community: A group of established professionals has built a social community around the series. In addition, there is a growing sense of mission around the program.

Convenience and comfort: The Arlene Schnitzer Concert Hall is centrally located, comfortable, clean, and atmospheric, with good sight lines and sound.

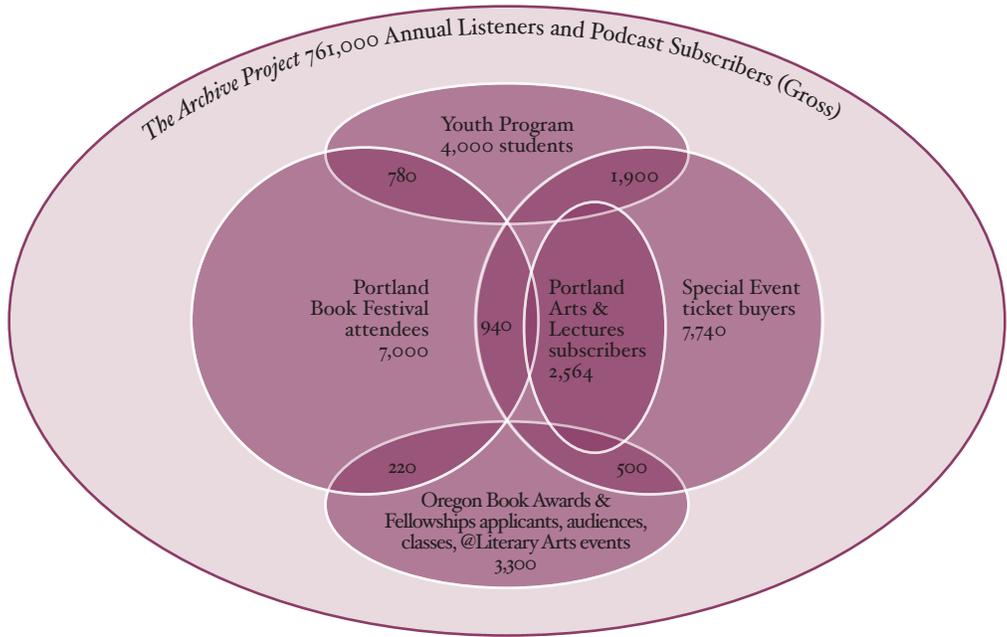
Author contact: The series offers up-close and, in the case of Patrons, personal contact with celebrity authors.

Producing our events at the Arlene Schnitzer Concert Hall makes a statement about literature in our city. This puts our events on par with other art forms—the symphony, opera, or visual art—and gives them a high profile. It also has its challenges, however, as we think about our equity work. Downtown Portland, and the concert hall specifically, has historically not been welcoming to communities of color.⁸

Some of the learning from presenting @LiteraryArts and the Portland Book Festival has been that “mode” matters, meaning that the content of an event is only part of the reason why audience members decide to attend. A concert hall experience, with reserved seats and other conveniences, attracts one group of attendees, while a festival with few formalities, higher energy, and crowds attracts another, though there is a group that attends both. As we think about our equity work, it will be important to think about not only who we are producing but also how and where.

8 <https://www.theatlantic.com/business/archive/2016/07/racist-history-portland/492035/>

In addition, PA&L is no longer our largest program, nor can it claim to reach the most people. The Portland Book Festival is a larger program in terms of expense and audience, and The Archive Project reaches far more people than both combined.



SPECIAL EVENTS

Our Special Events (SEs) are very different from Portland Arts & Lectures in many regards. As single-ticket events, they rely heavily on name recognition of the speaker, trends in presenting, and perceived relevance. These events are far riskier than Portland Arts & Lectures.

The criteria for choosing SEs are as follows:

- A speaker/group who would not fit in the series because of time or content but will help us cultivate new audiences

- A speaker/group of artistic excellence whom we feel is important to present, regardless of the audience size they will attract

- A speaker whom we could not afford via the traditional model but only through a partnership or other opportunity

A collaboration with another organization that will help us cultivate new audiences

A cultural celebrity who can move high-priced tickets that will generate revenue for the organization

To book PA&L and SEs, we either pay a fee directly to the artist (or their agent) or book bundle with books purchased directly from Powell's.

In general, SEs tend to be more celebrity-driven than PA&L and are riskier in terms of ticket sales. Audience demographics for these events vary depending on the speaker.

Over the past three years, Literary Arts has decreased our dependence on these events. This has been achieved through conservative budgeting for SEs. Nevertheless, SEs still generate a significant amount of income for the organization and often are the largest contributors to surpluses.

Next Evolution

In the last strategic plan, it was determined that the single most important goal was to reduce the dependency the organization had on revenue from PA&L and SEs to do other programmatic work. Modest gains have been made on this front with budgeted surpluses or deficits remaining flat even while there has been significant growth. For example, in 2014, combined surplus income from PA&L and all SEs was \$73,789 on a budget of \$1,393,155; in 2017, combined income was \$90,854 on a budget of \$2,046,042. Looking ahead, we should continue to budget for modest surpluses for PA&L and break-even performances from SEs to avoid building capacity in other programs on ticket sales. In a perfect world, PA&L and SEs would only support themselves, which would give these programs greater artistic freedom and allow for more experiments in audience development.

Looking ahead, programmatic changes to PA&L will be minimal. The lecture series will continue to book the greatest literary writers alive, paying very close attention to gender, racial, and genre diversity. With the presenting format at the Portland Book Festival being conversational, PA&L should emphatically stay as a series of lectures or talks. This will keep the two programs distinctive and give audience members clear choices.

Competition for speakers will remain strong, so we should never take the series for granted, and we should continue to properly resource speaking fees as well as staff time and travel to build the relationships we need with agents, publishers, and authors.

Our audience remains overwhelmingly white, despite the diversity of speakers on stage. This has to do with the history of the series, the history of the concert hall and of downtown Portland, the relative rigidity of a subscription model, and the very high renewal rates. There is very real tension between the need to earn revenue and the need to develop a diverse, equitable, and inclusive experience. As such, a key goal for 2021 will be to make progress toward an audience that reflects the racial demographics of the greater Portland metropolitan area.

A related key goal will be to research and establish tools to quantify the demographics of our presenters and audience in an ethical manner and with reasonable accuracy. At the time of this drafting, this is still very much a work in progress.

SUMMARY OF GOALS FOR PA&L (IN ADDITION TO MEETING INCOME GOALS)

Present a relevant and exciting roster of the world's most important writers and include one or two iconic speakers in each season.

Ensure our lineups are at least 40% people of color and 40% women over a three-year period.

Continue our "writer in residence" model, bringing speakers to spaces and places outside the concert hall, including high schools, and Literary Arts (to meet with local writers).

Act as an important platform to elevate other Literary Arts programs.

Maximize access to as many different potential audience members as possible, and work to diversify the audience in terms of race.

The criteria for choosing SEs will remain the same going forward, but with a greater emphasis on finding new and diverse audiences. We will continue to budget for

these events to break even so as not to build capacity on potential surpluses and to give them as much artistic freedom as possible given the scale of the events.

With the addition of @LiteraryArts and the huge variety of venue sizes within the Portland Book Festival, it is difficult to see an argument for a significant increase in the number of SEs we mount, or to add different-sized venues. However, we will remain flexible and opportunistic, and we hope to work with Powell's more frequently. If we were to significantly increase the number of concert hall events, we would need to increase both program staff and box office staff. With that said, one consideration that could advance our equity work would be a partnership in east county, creating a series of events relevant to the often underserved populations in these neighborhoods. Instead of simply doing more of the same downtown, a sensitive and responsive program presenting in this part of the city could advance our mission to serve a greater diversity of Oregonians.

Over the past ten years, we have managed to establish two perennial SEs: Everybody Reads and The Moth Mainstage. Perennial events are valuable to us in that they can create perennial audiences and a brand that deepens our relationship with different communities. They also help create stability in our programming year. We should continue to search for a partnership or event that will add another recurring event to our annual schedule of events.

SUMMARY OF GOALS FOR SEs (IN ADDITION TO MEETING INCOME GOALS)

Seek out another perennial event and more general, new partnerships that either generate revenue or grow our audience.

Continue to pursue great alignment and/or a formal partnership with Powell's.

Explore the possibility of presenting in east county.

PORTLAND BOOK FESTIVAL (FORMERLY WORDSTOCK)

Landscape

Arts festivals create a moment for their communities in which art is elevated above routine concerns and the inescapable news cycle. This matters in a busy, noisy, and increasingly divisive world. Festivals remind us, at a civic level, of the power of a particular art form. Their density of events offers not only the opportunity to discover new art and artists but also a shared connection with fellow citizens. Festivals can offer unparalleled efficiency through volume; this volume also provides an important media moment. Because most festivals prize access, they provide a wide range of art to a wide range of our citizenry. Furthermore, when programmed to feature famous or celebrity artists from around the country and to simultaneously highlight great local artists who are lesser known, festivals can serve as a crucial vehicle for elevating local creative communities.

Book festivals in particular create an important civic occasion for writers and readers of all ages to come together and engage with the making of literature. The impact of such a powerful annual experience goes far beyond the festival day. The mixture of the world's best writers, from Oregon and beyond, engages readers, supports our local writers, and inspires the next generation.

Portland prides itself as a book town; one of our most popular tourist destinations is Powell's City of Books,⁹ the largest independent bookstore in the country. We are a city that prizes the creative class in all fields and that seeks to foster a literate, engaged, inclusive, innovative, and international population. It is a point of civic pride that Portland should have a nationally recognized literary festival that supports our local writers, and it gives us the opportunity to provide our writers with a national platform in their hometown.

For the Portland Book Festival (PBF) specifically, there is no comparable festival in the Pacific Northwest.¹⁰ Events of a comparable size on the West Coast are the [Vancouver Writers Fest in British Columbia](#), which is typically held in October,

9 <https://www.travelportland.com/article/top-sights-in-portland/>

10 We consider the Pacific Northwest to include Oregon, Washington, and parts of Northern California and southern Idaho.

and the [Bay Area Book Festival](#), typically held in late spring. Neither Oregon nor Washington State has a general-interest book festival on a scale approaching that of PBF; Seattle does host a [Lit Crawl](#), but the APRIL Small Press Festival is no longer being produced. The [Orcas Island Lit Fest](#) debuted in Washington's San Juan Islands in April 2018.

One of the most important goals of PBF is to be a festival for readers. There are a few other festival-like literary events in Portland, but they are much smaller in scale and aimed at a more restricted audience, either by a focus on a particular genre or as more of a writers' conference than book festival. There are niche conventions such as [Rose City Comic Con](#) and [Kumoricon](#) and writing conferences such as the [Willamette Writers Conference](#) and [Tin House Writers' Workshop](#). The [NW Book Festival](#) is held in the summer, but it is small in scale and features self-published writers selling their work in booths; there are no discussions or onstage events. There are also industry-specific events such as the [Pacific Northwest Booksellers Association Tradeshow](#) and [PubWest](#). In this landscape, PBF is unique in that it is a festival aimed at readers of all ages and open to the public.

Looking at the broader culture-festival landscape, there are many film festivals, including the [Portland International Film Festival](#) and the [Northwest Filmmakers' Festival](#), and niche film festivals such as the [Motorcycle Film Festival](#) and [EcoFilm Festival](#). Perhaps most notable is the Portland Institute for Contemporary Art's Time-Based Art Festival, or [PICA TBA](#), which takes place in September for more than a week in multiple venues, and for which each event is ticketed separately. As we look to similar local models in other sectors, there are dance and music festivals, as well the Feast food festival and countless beer, cider, and wine events throughout the year. As PBF strives to be for and reflective of Portland, it is useful to keep an eye on these other events. While the abundance of cultural options in the city and region certainly means competition for audience, more importantly, such a diverse range of cultural options makes Portland, and Oregon as a whole, a culturally fertile place where the festival can thrive. Again, even among so many cultural events, we are unique in the city and in the region as a large general-interest book festival.

Beyond Portland, well-established (decade or longer) festivals such as the [Los Angeles Times Festival of Books](#), [Brooklyn Book Festival](#), [Texas Book Festival](#), and [Miami Book Fair](#) are going strong. New festivals are popping up in comparable

metropolitan areas: the [Bay Area Book Festival](#) also launched in 2015; the [Montana Book Festival](#) has been building steam for a couple of years now; and the Loft in Minneapolis is preparing to launch a book festival in April 2019. This longevity and growth are good news for the festival model.

There is a demonstrated desire for readers to come together in community around books and literature, and PBF provides that moment. The high audience demand so far—7,000 to 10,000 attendees—affirms the thirst for an event of this kind that brings readers together.

Current Platform

The Portland Book Festival is an opportunity to create a one-day, intergenerational manifestation of Literary Arts' mission to engage readers, support writers, and inspire the next generation with great literature, and to be a showcase of our programs. The festival is well on its way to establishing itself in the local and regional cultural landscape as the must-see booklovers' event in the Pacific Northwest. The festival has boasted lineups of established writers and rising stars for all three years of the relaunch, and in 2017, almost 100 tickets were sold before the lineup was even announced. The next three years will be a test of the festival's sustainability as it finds its footing both in the cultural calendar and with funding.

The festival prominently showcases all of Literary Arts' programs: sessions are taped for later broadcast on The Archive Project; there is a full lineup of writing classes throughout the festival day, including free classes for youth; Writers in the Schools has a launch reading for their student anthology; and many presenting authors have received an award or fellowship through the Oregon Book Awards & Fellowships and/or taught in Literary Arts workshops or seminars.

The festival hosts Literary Arts' largest live, in-person audience and serves as an important entry point to the organization for many people. For more than 30% of attendees, the festival was their first point of engagement with Literary Arts programming.¹¹ Programmatically, the depth and diversity of the festival model allow us to present genres and writers that we do not have a clear place for in our other programming. One of the challenges of Portland Arts & Lectures (PA&L) is

11 In 2017, for 36% of attendees, the festival was their first point of engagement with Literary Arts program; in 2016, for 33%; and in 2015, for 37%.

that the series requires, almost exclusively due to the prestige of the program and the size of the venue, very famous authors. This means that PA&L must decline many authors who have achieved “artistic excellence” but are not well known by a wide audience. In addition, our publishing partners in New York can grow weary of us only requesting their “stars.” A festival gives Literary Arts the ability to program accomplished yet lesser-known writers, thereby strengthening our partnerships with the large publishers. Building the careers of a variety of writers is part of our mission, ensuring a steady stream of diverse and accomplished writers who are relevant to different generations.

Thus far, we are committed to keeping PBF to one unmissable day, keeping ticket prices low, and staying at the downtown arts venues. It is of critical importance that the festival remains accessibly priced: central to the ethos of the festival is that it is a literary event for all, and we strive to lower all barriers to entry. While many comparable book festivals—in Los Angeles, Brooklyn, Texas, and Miami—offer free admission, we have successfully met our goals while selling low-priced tickets, combined with free admission for certain populations. PBF tickets have remained \$15 (\$20 on the day of in 2018) for four years running and free for attendees 17 years of age and younger and/or with valid high school ID.¹² Additionally, the festival participates in the Multnomah County Library’s Discovery Pass program, which provides free tickets to library patrons, and in the Regional Arts & Culture Council’s Arts for All program, which provides \$5 tickets to SNAP cardholders. We also give out free tickets on a case-by-case basis; recipients in the past have included KairosPDX, Write Around Portland, New Avenues for Youth, and more.

The \$5 book voucher included with all paid tickets has proven to be a great success with both attendees and booksellers/exhibitors. One area in which PBF excels compared to other similar festivals is book sales. Most festival attendees (63% in 2017) purchase at least one book at the festival and make use of their \$5 book voucher.¹³ This is, from our understanding, exceptional, and an important metric for publishers in particular as they consider sending top-tier authors to the festival. The vouchers and the gallery pop-up readings are unique aspects of our festival in particular and add to the experience for authors, attendees, and exhibitors. We

12 In 2017, in recognition of the festival falling on Veterans Day, active duty military and veterans also received free admission.

13 In 2017, 58% of ticket buyers used their voucher; 5% of survey respondents did not receive a voucher with their ticket. In 2016, 69% used their voucher. In 2015, 41% used their voucher.

expect to see other festivals implement the voucher idea, which is a complement to its success.

The first three years have been a “Goldilocksing” experience in finding just the right size for almost every aspect of the festival, and each year we are getting a little better. The 2017 survey showed that the festival met or exceeded expectations for 84% of respondents (34% exceeded).¹⁴ When asked if they were likely to attend again or recommend the festival to a friend, 80% of 2017 survey respondents said yes.¹⁵ When asked why they attended the 2016 festival, 89% of attendees surveyed said “because I believe that books and reading are important,” with 83% saying “to watch presentations by specific authors” and 71% “to learn about authors who are new to me.”

Attendees are especially appreciative of the diversity of our author lineup (91% “more than” or “very” satisfied) as well as its “quality” (90% “more than” or “very” satisfied). For the last three years, the festival has featured more than 60% women writers and more than 20% writers of color,¹⁶ with about half of the presenters hailing from the Pacific Northwest. We plan to continue to achieve—and hopefully improve on—this programming success.

Most festivalgoers are adults attending solo or in pairs, without children. According to demographics from our survey and TRG (a third-party data center serving arts organizations), the average attendee is a white woman, and she is probably a baby boomer; however, it should be noted that one of the big challenges for the festival is that we do not—and cannot—know who most of the people attending are. Part of the trade-off in prioritizing accessibility is a high volume of walk-up ticket sales; we are unable to survey those attendees or get data from them. The people who fill out the survey and whose data is available in TRG simply do not represent the complete festival audience. We can assert this because we know, as it is a different ticket, that 15% of the audience in 2017 were youth, and this population is not represented in either survey method.

14 In 2016, the festival met or exceeded expectations for 92% of respondents (56% exceeded) versus 49% of respondents (17% exceeded) in 2015.

15 In 2016, 90% of survey respondents said they were likely or very likely to attend again. In 2015, 71% said they were likely or very likely to attend again.

16 This data is not currently self-reported. We are in the process of evaluating our methods.

There are, functionally, at least two festivals happening: one that attendees experience and one that authors and other presenters experience. (There are also volunteers, exhibitors, vendors, etc.) We have covered what attendees are looking for above, and though authors intersect with those interests, they have other specific needs as well. Communication, before and during the festival, and hospitality are critical in keeping authors, and therefore publishers, happy with their festival experience. We pride ourselves on clear, thorough communication about festival events and making ourselves available for questions. Good food, drinks, and opportunities to connect with their peers at a well-appointed green room and at the author reception are key in keeping authors happy. The post festival author reception is the highlight event for many of our authors. One hundred percent of authors who answered the 2016 survey said that they would return to PBF if asked, and we have heard anecdotally that authors are telling their friends not to miss the opportunity to come to Portland for PBF. This word-of-mouth marketing among the literary community is critical to the festival's growth and to our reputation within the industry.

Partnerships are foundational to the festival's success. We will continue to build on foundational partnerships with the Portland Art Museum (PAM), Multnomah County Library, Oregon Public Broadcasting (OPB), and Powell's. We have added Annie Bloom's Books, Broadway Books, and Green Bean Books as festival booksellers, and Powell's has expanded their festival presence to include satellite bookstores. In 2018, in the constant effort to encourage festival book buying, we will satellite bookstores to the stages that currently do not have them. We are also expanding programming partnerships with the Poetry Foundation and the Whiting Foundation that directly support authors' travel costs for the festival, and in 2017, we launched a media and programming partnership with the *New York Times*. We rely not only on the publicity from these networks but also on the staff and volunteers of these organizations to support the festival, from PAM running the box office and ticketing to OPB and the *New York Times* moderating onstage events and the bookstores selling books for featured presenters.

One of any festival's challenges is catching authors at the opportune moment in their publicity cycle. One of the reasons that PBF features new books (published within the 18 months preceding the festival) is to maximize the potential for publisher support of author travel. We simply could not afford to provide

complete travel support for the more than 50 authors who travel to Portland for PBF. Growing publisher insistence on book-bundling or book-as-ticket models could become increasingly challenging for the festival as we compete for top-tier authors. As PBF does not pay speaker fees and does not plan to, experimenting with different book-bundling models could open up access to headline authors who would otherwise be unattainable while maintaining the “no speaking fees” baseline.

One of our challenges is the lack of civic support for arts and culture from both the city of Portland and the state of Oregon. This is true not only of PBF but also of the larger cultural landscape. We have thus far not had any support from the city or the state for the festival specifically. Many other festivals, including those in Texas and Brooklyn, would not be possible without direct support from the host city.

PBF is still finding its financial footing as we transition from foundational funding to corporate and individual donors, and it is not yet financially stable. The festival will always depend on contributed income; there is no intention—or frankly, possibility—for ticket sales to support the festival entirely. The unexpectedly high attendance in 2015 prompted a fast expansion in 2016, in which we more than doubled the number of seats by tripling our venues (from two to eight venue partners, resulting in over 5,000 seats), and we are still catching up to this growth spurt. The next few years will be critical in determining whether the festival has the community support to continue at its current size and scope.

Next Evolution

One of the biggest challenges for PBF over the next few years will be fundraising. The festival is an expensive venture; the projected costs for the 2018 festival are \$220,619, and Literary Arts is still allocating \$34,319 of our own funds toward the festival. Furthermore, 2018 will be the first year the foundation funding from the James F. and Marion L. Miller Foundation, Meyer Memorial Trust, and the M.J. Murdock Charitable Trust is no longer available. The next few years will be a real test of the financial stability of the festival, both in terms of contributed support and community support to continue in its current form.

The festival will have the perpetual goal to expand the audience for literature and to attract new audiences to Literary Arts. The festival will remain as accessible as

possible for attendees and seek to offer something for every kind of reader. The 2017 festival was the largest yet, at 10,000 attendees, which also demonstrated to us that 10,000 should be our maximum capacity for attendance. For 2018, we are comfortable staying at the same size, but if we did want to increase capacity in the future, it is unclear how we would do so. There are no more viable venues within walking distance from the current campus. We have run out of room to expand the festival space. Additionally, it is perennially difficult to agree on a weekend that works for all of our venues (particularly the Portland Art Museum and Portland's) while also staying clear of other major national events that would compete for talent, particularly the Texas Book Festival and the Miami Book Fair.

In terms of authors presented, our goal will always be to attract and feature headline, marquee authors who are recognizable household names and to present them alongside exciting, new literary talent. We aim to present a diverse lineup in terms of race, ethnicity, gender, discipline/genre, geography, age, and more. The festival is proud to be known for being exceptionally well curated and well organized and will work to maintain and strengthen that reputation.

Beginning in 2018, we will change the festival name from Wordstock: Portland's Book Festival to Portland Book Festival. The timing is right, in the wake of 2017's success, and we believe that Portland Book Festival is a more inclusive name, avoiding any connotation of being insider-focused or more like a conference or convention. The simpler, more generic name keeps the focus on the event itself and does not require a subtitle or additional explanation. Furthermore, the name marks the festival as the major civic event that it has become, elevating the festival's recognition locally, regionally, and nationally. The name Portland Book Festival also brings the program into alignment with other Literary Arts programs such as Portland Arts & Lectures and the Oregon Book Awards & Literary Fellowships, making it even more clear that the Portland Book Festival is a program of Literary Arts.

Currently, staffing is beyond capacity, preventing programming expansion. Programming expansion goals include introducing an official festival author school-visit program for K-12 classrooms. Many similar festivals, such as those in Miami, Texas, and Los Angeles, have a day or days before or after the festival where they arrange school visits, including book sales or giveaways, from festival

authors. Children's (picture book, middle grade, and YA) publishers are particularly interested in the additional opportunity for their authors, and a school visit program would act as promotion for the festival, as children often enjoy the visit and encourage their families to attend the event. This is an important next step for the festival, both in terms of attracting authors and carrying out our mission of accessibility and inclusivity. In researching school visits, it has become clear that it would require a dedicated, seasonal part-time staff member to manage a school visit program. This role could perhaps expand into programming some of the children's events at the festival as well; many similar events have a dedicated children's programmer or committee.

Some interest has emerged to create a network of festival-style events throughout the state, integrating programming from smaller, regional festivals, namely the [Ashland Literary Arts Festival](#), which is in the process of relaunching. There is also a desire for an Eastern Oregon festival in Bend to replace the [Nature of Words Festival](#). The goal over the next three years will be to explore and research whether a network of regional satellite festivals makes sense for the organization, perhaps as a partner or even as a presenter.

In terms of expansion, the arguable next step would be to explore a two-day festival. We do not feel that this can be broached until we have created a stable financial foundation for the one-day festival. However, we will explore whether to pilot a second day that is not composed of presenting author events: maybe day two is a writing conference, for example, with a full day of workshops and programming aimed at writers specifically. This writers' conference would be aligned with the writing workshops we offer at the Literary Arts space and would operate as part of or in conjunction with that program. Or, modeling on the Brooklyn Book Festival, maybe the second day is a children's day, or even a teen book festival. The goal would not be to introduce a second day within the next three years, but instead to examine the potential directions the festival could expand in were it to introduce a second day.

Similar to the time expansion, we will also consider adding expanded partner programming leading up to and immediately after the festival; we have in mind as a model the Brooklyn Book Festival's Bookend program. We currently present Lit Crawl Portland the night before the festival; we work with the Northwest Film

Center to present two nights of author-chosen films with Q&A and with Live Wire Radio to present two shows featuring festival authors; and we have co-programmed with Back Fence PDX, Portland Story Theater, the Profile Theatre, and a few other local organizations. Introducing a Bookend-style program would open the week before the festival to officially sanctioned partner programming. We would not be creating or running these events ourselves, nor would we be as involved as we are with presenting Lit Crawl. Instead, organizations would plan their own literary events and submit them for consideration as official Bookend (or whatever term we come up with) events as part of the festival week. If accepted, they would be promoted by Literary Arts as Bookend events, and the week of programming would build excitement for the main event on the weekend. Furthermore, creating a Bookend committee could give us an opportunity to engage more community members and festival stakeholders in programming decisions for this particular area.

The first three years of the festival have shown that there is substantial community demand for the event, and we have laid a foundation with authors and publishers that has established the event as an exciting and desirable festival. The event expanded quickly from year one to two due to attendance demands and is settling into its current shape and form. Overall, the next three years will test whether the festival can maintain the momentum created in these first few years of the relaunch while stabilizing funding and support for the years to come.

SUMMARY OF GOALS FOR THE PORTLAND BOOK FESTIVAL:

Create financial stability.

Maintain attendance at 7,000 to 10,000, including at least 10% youth.

Continue to present a diverse author lineup featuring top-tier, best-selling headliners alongside exciting new talent.

Explore potential directions for festival expansion:

Author school visits

Regional satellite festivals

Second day of programming

Bookend week preceding the Festival

YOUTH PROGRAMS

Landscape

Portland's story of itself has changed since Writers in the Schools began. The idea of our city as homogenous, led by established families and organizations, has been challenged by a more diverse influx of Portlanders. At the same time, awareness has grown that the city's growth over the last decade has seriously destabilized communities of color. Now Portland must grapple with the consequences of gentrification while also learning to be inclusive of greater diversity across the spectrum; this includes people of color who have experienced multiculturalism in other US cities and expect the same here, as well as new immigrants and traditionally marginalized groups.

In response, the community is paying increased attention to issues of diversity, equity, and inclusion, and these values have risen to the forefront of Youth Programs' planning. The City of Portland, Multnomah County, Portland Public Schools and All Hands Raised, and individual school districts are all demonstrating a commitment to diversity and to equitable access to services in order to address the achievement and service gap for people of color and the socioeconomically disadvantaged.

Portland Public Schools (PPS) has established an official racial equity policy and a five-year plan. Most recent work has centered around the concept of being "culturally responsive," which asks that organizations be flexible and collaborative in their approaches to diverse communities. Superintendent Guadalupe Guerrero, hired in 2017, has foregrounded equity in his first year. Of note for Youth Programs' work are the following stated racial equity goals of PPS from their five-year plan:

"The District shall create multiple pathways to success in order to meet the needs of our diverse students."

"The District shall actively strive to have our teacher and administrator workforce reflect the diversity of our student body."

"The District will include other partners who have demonstrated culturally-specific expertise—including...non-profit organizations—in meeting our education outcomes."

Finally, it is worth mentioning that we live in a politically tumultuous time with increasing threats to defund arts programming. While Literary Arts succeeds without excessive dependence on national grants, the general funding climate is one of tightening resources and anxiety about the future of government support for the arts.

Nevertheless, there is good news. A recent study funded by the Oregon Arts Commission showed that “Oregon’s arts and culture sector contributed \$687 million and 22,299 jobs to Oregon’s economy in fiscal year 2015.”¹⁷ Youth Programs continues to thrive and be in demand, suggesting that our value is both acknowledged and sought after. As Literary Arts’ overall profile has risen, so has awareness of Youth Programs; conversely, Youth Programs’ outreach outside of Portland has helped us grow our reputation as a regional actor.

Oregon has one of the most underperforming school systems in the nation, with high student-faculty ratios, a short calendar year, and a low graduation rate.¹⁸ It is widely believed that the destabilization of Oregon school funding began in 1990, when Measure 5 was passed.¹⁹ As a result of Measure 5, property taxes dedicated for school funding were capped at \$15 per \$1,000 of real market value per year and gradually lowered to \$5. Property taxes for other purposes were capped at \$10 per \$1,000 per year. The measure transferred the responsibility for school funding from local government to the state to equalize funding.

The recessions and financial crises of the early 2000s intensified inadequate and unstable school funding and have had many unfortunate consequences, including schools cutting arts classes, which have been shown to positively contribute to student achievement and attachment to school.²⁰ Oregon has been slow to recover from these crises, but as the recovery progresses, it is Portland that leads the way as an economic engine.

For 2017–2019, the state narrowly passed a budget of \$8.2 billion for public schools,

17 https://www.oregonartscommission.org/sites/default/files/news/file/2017_06_20_AEP5%20Oregon%20release%20final.pdf

18 http://www.oregonlive.com/education/index.ssf/2017/12/oregons_graduation_rate_remain.html

19 <https://www.opb.org/news/article/oregon-education-measure-5/>

20 <https://www.aep-arts.org/wp-content/uploads/AEP-Action-Agenda-Web-version.pdf>

an 11% increase from 2015–2017. While this was greater than the amount proposed by the governor, many stakeholders agree that this amount does not meet the actual or predicted needs of the schools, which have suffered years of cutbacks. In addition, the costs of employee pensions have outpaced the rate of budget increases, meaning that PPS, for example, has continued to cut teachers and staff.

Current PPS student enrollment is over 48,000, is increasing, and is expected to continue to do so. Approximately 23% of these are high school students. The demographics of PPS students are as follows: 10% African American, 7.3% Asian, 16.2% Hispanic, 0.9% Native American/Alaskan Native, 8.9% multiracial, 0.8% Pacific Islander, and 55.9% white. In other words, 44.1% of PPS students are nonwhite, considerably more than in the overall racial makeup of the city. English language learners make up 7.3%; 46.3% are eligible for free and reduced-priced meals; and 13.8% receive special education services.

PPS has made graduation a major focus. The on-time high school graduation rate in PPS is currently 76%. The state of Oregon's graduation rate is 75%. The national high school graduation rate is approximately 82% as of 2014–2015. In 2016, according to *The Oregonian*, "Oregon schools achieved record or near-record improvement among students who traditionally have struggled to get to the finish line—students of color, students with disabilities, low-income students and those for whom English is a second language. Graduation rates for black students, special education students and non-native English speakers surged by 3 to 4 percentage points."²¹ Nonetheless, graduation rates for nonwhites, aside from Asians, remain considerably lower than the overall state average.

PPS school libraries, important partners for Youth Programs, have suffered during the financial swings. As of 2015, funding was increased both for staffing and for the overall library media services budgets. All schools are now served with a part-time media specialist at minimum. However, budget cuts threaten the employment of many assistant librarians, leaving libraries understaffed. Budgets swing widely from year to year, and librarians are left with little reliable monies for staff, books, and events.

In addition to cutting arts staff and instruction, schools have fewer administrative

21 http://www.oregonlive.com/education/index.ssf/2017/01/oregons_graduation_rate_among.html

resources that allow them to reach out to, work with, and maintain relationships with arts organizations. Arts organizations must provide these administrative resources and absorb their costs if programming is to be effective.

Since 2010, All Hands Raised (formerly the Portland Public Schools Foundation) has been working to create a structured, cross-sectoral, cross-cultural effort to support strategies that work for all youth throughout Multnomah County, whether they originate with nonprofits, government agencies, or schools; the All Hands Raised vision is “cradle to career.”

As Youth Programs became an established PPS partner with long-term relationships in all public high schools, Youth Programs turned its attention to equity. As a result, Youth Programs identified building programs in east Multnomah County, an area where students are underserved by arts programming, as a primary goal.

In promising news, east Multnomah County graduation rates have steadily risen (with the exception of Reynolds High School) in recent years. However, the region remains both high need and underserved. The government identifies four high-poverty hot spots in east county, together containing 17% of Multnomah County’s poor. The overall poverty rate in these hot spots is around 30%, and nonwhite percentages range from 5% to 19%, greater than the county average of 17% nonwhite residents.

In addition to the educational landscape, Youth Programs is also a part of and influenced by other arts education programs in the region.

In 2015, Oregon introduced new standards for media arts in five disciplines. The official position of PPS is “Arts Education Matters”:

The arts are fundamental to children’s creative expression and their overall growth and learning. Integrated into core curriculum, they enhance comprehension and engagement. On their own, they nurture self-esteem and increase whole-brain activity. The arts are our greatest tools to promote creativity in the classroom. Our vision at PPS is to increase equitable access to the arts for all children.²²

22 <https://www.pps.net/Page/687>

In November 2012, 62.34% of Portland voters passed Measure 26-146 to restore arts and music programs to Portland schools and fund the arts citywide. The passage of this ballot measure indicated that a large majority of Portland voters value arts education and are willing to pay for it. The \$35-a-person tax funds two different areas. About 70% of the money is distributed to Portland-area school districts to help hire art and music teachers and to fund K-12 arts programs. The remaining funds go to the Regional Arts & Culture Council (RACC) for distribution among Portland arts organizations, such as the Oregon Symphony, the Portland Art Museum, and Literary Arts, who use the money to offer publicly accessible arts programming. Thanks to Measure 26-146, there is an arts instructor (music, drama, dance, and/or visual arts) in every K-5 and K-8 school. In 2016-2017, this money allowed PPS to budget 52.5 arts teachers.

The following artist-in-residency programs serve the Portland metropolitan area and surrounding communities:

The largest is [Young Audiences \(YA\)](#), which serves grades K-12 and works closely with the Right Brain Initiative (RBI), an RACC initiative that serves grades K-8. YA and RBI hire some writers as teaching artists, along with many teaching artists from other artistic disciplines (visual art, theater, music, and dance). Artists on these rosters are not guaranteed work. Over 70,000 students in Oregon and Southwest Washington were served in 2015-2016; 126 of these residencies were in the literary arts.

[Playwrite](#) is a nonprofit organization focusing on teaching playwriting to at-risk youth in alternative schools.

[Write Around Portland](#) is a nonprofit organization offering writing workshops run by trained volunteers for marginalized communities in alternative schools, SUN Community Schools, correctional facilities, social service agencies, and public schools. In 2016, 446 youth/adults participated in 10-week writing workshops facilitated by volunteers.

[White Bird Dance](#) has an Annual Outreach Project in PPS that reaches over 3,000 students. The [Oregon Symphony](#) has occasional Young People's Concerts during the school day. The [Oregon Ballet Theatre](#) has group rates and a "pay your age"

program for those under thirty-five. The Portland Art Museum is free for those aged seventeen and under.

Other programs include Spit/WRITE and its Youth Poet Laureate Project (which in some ways directly overlaps with Literary Arts' work such as Verselandia!), Open Signal's digital media work, and Visions and Voices by Portland Center Stage (PCS). PCS also offers discounted tickets to schools at select performances, as well as free tickets to Title I schools and social service agencies. RACC is also working on revamping its Poetry Out Loud program.

In east Multnomah County, there are few arts partners. RACC's Right Brain Initiative has been successful at integrating into approximately 70 elementary and middle schools. Journalistic Learning Initiative, which has a writing component, has worked at Gresham High School. And MetroEast Community Media offers programming, including workshops, for youth.

Across Oregon, prominent programs include Caldera, which offers camps, residencies, mentorship, events (mostly with middle schoolers, but they also offer high school workshops and scholarships); Youth Arts for Change, a program of the Clackamas County Arts Alliance; and Fishtrap's Story Lab, which serves students in kindergarten through eighth grade.

It is worth noting that while arts education seems to be on the rise, perhaps as schools realize the cost of eliminating creative work from the curriculum, the teaching of writing as a creative art remains limited to just a few organizations.

Current Platform

Since the last strategic plan was created, significant changes have been made to what was formerly called Writers in the Schools (WITS). Now called Youth Programs, this program encompasses WITS, Students to the Schnitz (StoS), Verselandia!, and the College Essay Mentoring Project (CEMP). Additional projects include youth workshops at the Portland Book Festival, author visits by Portland Arts & Lectures and Special Events speakers, and our collaboration with Multnomah County Library on Everybody Reads. Together, these initiatives provide reading, writing, and publishing opportunities for students; employment and professional development for local writers; professional development and

optional credit hours for teachers; and perhaps most importantly, a sense of belonging in our literary community for youth.

The budget has doubled in size as this dynamic group of programs has continued to expand. Our service area now encompasses partners in east Multnomah County as well as around the state. A new program director has been hired, along with an additional WITS program specialist. Program coordinator Mel Wells was promoted to associate manager of programs and directly manages CEMP and the creation of the WITS anthology, among other work.

Historically, Youth Programs has focused on serving students in PPS. When Youth Programs began as WITS in 1996, the rationale for serving PPS with Youth Programs services was PPS's low on-time graduation rate, its unstable and inadequate funding (leading to cuts in arts and library instruction), and its proximity to Literary Arts. In recent years, our attention has turned toward underserved students outside of PPS.

However, Youth Programs' ambitions in east Multnomah County have been countered by a lack of established partners, a lack of money in the schools, a tendency for the various districts to work in isolation from one another, and a lack of prioritization for arts in the schools. While partnerships with Parkrose and Gresham High Schools are thriving, communication with other schools (including those with the highest need) has largely been limited and program-specific (i.e., a single teacher will contact us directly about participation in a smaller program, such as CEMP or Verselandia!). In particular, it has been difficult to bring WITS into east county in a comprehensive way. Instead, smaller programs, offering one-off events, have been easier to introduce.

Youth Programs' current budget allocation is as follows: WITS residencies, 66.5%; StoS, 12%; Everybody Reads, 5%; CEMP, 4%; and Verselandia!, 10%.

WRITERS IN THE SCHOOLS (WITS)

Youth Programs started in 1996, when WITS began hiring local professional writers to inspire public high school students to write, revise, edit, and publish their writing. Ten-session residencies help teachers meet their goals for arts learning, contribute to student achievement in writing, and reinforce the real-world importance of

reading and writing in all professions. Each year, we reach over 4,000 students with our services.

In 2016–2017, WITS served 1,085 students from 11 high schools with semester-long writing workshops (44 classes worked with a writer). WITS is well established in all Portland public high schools as well as alternative programs. Two east county high schools, Parkrose and Gresham, have become enthusiastic partners. The residencies culminate in public student readings for each participating school at neighborhood bookstores and cafés throughout the city; in 2016–2017, 161 students read in front of 625 attendees.

WITS residencies support and extend existing curricula and are designed to meet state and national standards for the arts and language arts. In addition to other graduation requirements, beginning in May 2013 all Oregon high school seniors must pass a state writing test in order to graduate. WITS creative writing residencies are designed to meet Common Core standards and skills students must demonstrate on state writing tests, such as developing real or imaginative experiences or events using effective technique, well-chosen details, and well-structured event sequences.

WITS writers also model strategies that help students develop and strengthen writing by planning, revising, editing, rewriting, or trying a new approach. WITS writers teach students how to access creative and imaginative thinking, how to practice persistence, and how to develop a disciplined artistic process. The WITS program uses technology, including Google Classroom, to produce and publish student writing projects.

WITS writers teach “across the disciplines” in classes such as English, history, science, art, Spanish, and English-language-learner classes. Classes take place during the school day. Writing workshops are planned with the classroom teacher and support existing curriculum. Writers give students regular written feedback, and students are assessed by their classroom teachers for the time spent and work produced with the writer.

The WITS program offers a unique level of support to both writers and teachers, including the essential administrative infrastructure, to ensure that our teaching

artists are adequately trained, supervised, and evaluated. Because it is the teacher who chooses to have his or her class work with a writer, WITS reaches many students who would never self-select to work with a writer and who do not see themselves as good writers. Program specialists work closely with all partners to ensure that residencies are culturally responsive and flexible to different learning styles and that each student receives individual support as they find their writing voice. Because of this level of attention, WITS requires a significant investment of resources.

In our own assessments, as well as in the national literature, we consistently show that working with a professional writer leads to an increase in student confidence, creativity, and writing skill.

Other Programs

In the previous Literary Arts Strategic Plan, we identified raising the public profile of Youth Programs as a crucial component of sustaining the program. To that end, we reallocated resources to add “beyond school” programming serving high school youth. This programming has proved to be the most user-friendly as we have attempted to provide services outside of PPS.

In addition, these programs have provided the most promising paths forward as we strive to meet our equity goals. High-need schools demand the most flexibility from Youth Programs, and our smaller “menu” of services has allowed us to begin to build relationships throughout east county and the larger region.

STUDENTS TO THE SCHNITZ (STOS)

Our StoS program provides tickets and transportation for Portland Arts & Lectures and Special Events. Approximately 150 high school students attend each lecture, reaching a total of 1,193 in 2016–2017. StoS has also provided tickets to schools outside the Portland metropolitan area, including in Vancouver, Washington; Tillamook; and Aloha.

Youth Programs is also experimenting with inviting community youth partners in addition to schools. This year some of those partners include Multnomah County Library’s Teen Councils, the Muslim Educational Trust, Girls Inc., and Outside the

Frame, an organization that teaches filmmaking to homeless youth.

COLLEGE ESSAY MENTORING PROJECT (CEMP)

In the 2010–2011 school year, at the request of and with the help of partner high schools, Youth Programs began to train volunteer mentors to work one-on-one with students who needed additional help to produce quality college and/or scholarship applications. CEMP is also responding to community members' desire to play an active role in helping public school students get to college.

CEMP currently serves Benson, Franklin, Gresham, Madison, and Roosevelt High Schools, which each serve a large proportion of diverse and high-need students. Additional partnerships are under development at Grant and Parkrose. In 2016–2017, 233 students were served by 82 volunteer mentors.

EVERYBODY READS

Also in the 2010–2011 school year, Youth Programs/Literary Arts began partnering with the Multnomah County Library and the Library Foundation on the Everybody Reads program. Literary Arts provides tickets to the culminating author lecture and provides crucial administrative support to make sure schools know about the program; sign up for free books, tickets, and transportation; and follow through with utilizing these resources. This program serves about 1,000 students annually.

VERSELANDIA!

Since 2012, Youth Programs has partnered with the PPS high school librarians on Verselandia!, an all-PPS high school poetry slam. Verselandia! is the Grand Slam for individual school slams hosted by PPS and east Multnomah County library media specialists. As in the residencies, Literary Arts is able to attract and leverage funding for students that the schools are not able to leverage on their own.

In 2017, Verselandia! was supported by Wieden+Kennedy and several individual donors. The final was held at the Arlene Schnitzer Concert Hall. There were 1,378 attendees, and 21 students performed. Winners performed and toured at Wieden+Kennedy and had lunch with founder Dan Wieden. Literary Arts also features the Verselandia! winner at Literary Arts events.

Currently, participation in Verselandia! is capped at two slots for PPS students, plus one student each from Parkrose and Gresham High Schools. There is considerable demand from additional east county high schools for inclusion in Verselandia! PPS media specialists have asked that additional schools not be added to the current lineup, and Literary Arts has agreed to hold this growth.

ADDITIONAL YOUTH PROGRAMS SERVICES FOR STUDENTS

Youth Programs offers the following additional services for students:

Mentorships for students to work one-on-one with WITS writers

Q&A sessions in schools with touring authors (for 2017–2018, authors such as Francis Ford Coppola, George Saunders, Reza Aslan, Jesmyn Ward, and Claudia Rankine) through our author visit program

Books for students, teachers, and school libraries (to support StoS, author visits, and WITS residencies)

Student writing published in print and digital anthologies (108 students were published in the 2016–2017 WITS anthology *Galaxies on the Ground*)

Free youth writing workshops at the Portland Book Festival

Free slam poetry workshops

YOUTH PROGRAMS SERVICES FOR STUDENTS FOR TEACHERS AND VOLUNTEERS

In addition to serving students, Youth Programs also provides the following services for teachers and volunteers:

Employment and professional development opportunities for writers

Credit programs for high school teachers participating in WITS, in partnership with Lewis & Clark College

Professional-development units for WITS partner teachers

Free writing workshops for high school teachers at the Portland Book Festival

Mentorship training for CEMP volunteers

Next Evolution

After several years of strong growth, Youth Programs must now be sure to balance established programs with new endeavors in a sustainable way. Over the next three years, Youth Programs will continue to expand gradually, especially outside the PPS system, while relying on our established programs for continued stability.

The strength of Youth Programs is in developing deep relationships that allow for flexibility and collaboration; we can be open and responsive to the needs of our partners. Indeed, collaboration is and should continue to be a focus of our programs. We also need to continue the deep engagement that we have in diversity, equity, and inclusion work, allowing that work to guide our priorities as we look at potential changes that will help us address racial and socioeconomic inequity in our community.

Youth Programs will continue to work closely with established partners; find new ways to work with high-need, underserved populations; apply an equity lens to all of our work, including administration; model the writing life and the value of literature; and actively create space for young people in our literary community. Youth Programs seeks partnerships with community organizations, especially those that reach youth of color, and must be culturally responsive while doing so.

With equity in mind, Youth Programs should keep investigating the possibility of offering a menu of services with different pricing levels. Currently, we offer a range of services but only attach a fee to one (WITS). While there are potential problems with such a menu, it is worth considering for the potential benefits: flexibility and choice for our partners, especially non-WITS-participating schools, while attaching clear value to all of the services that Youth Programs provides.

It is also important to remember that Youth Programs engages teachers and writers along with youth. We must continue to provide new and relevant opportunities and professional development to both teachers and writers.

As our staff has grown, comprising 1.7 full-time staff and 3 part-time program specialists, it is important to carry on with practices that have enabled us to build a team identity, despite having specialists who work primarily outside the office. These include holding monthly team meetings, encouraging Youth Programs staff

attendance at all-staff meetings, and discussing program priorities and changes together. Staff should continue to collaborate on program guides so that we hold the same knowledge and to prevent misinformation. We also must evaluate deadlines and other administrative practices to be sure that we are not creating obstacles for our partners. To function best, it would be ideal to work toward creating a manager position for WITS and a part-time program specialist for Verselandia!

Our vision for Youth Programs is that it provides relevant and equitable services that benefit teachers, writers, and students—services that inspire youth and instill a sense of belonging in the literary world. To that end, we want to embrace what we are doing well while also setting goals for improvement and possibly expansion in our major programs in the following ways.

WRITERS IN THE SCHOOLS (WITS)

WITS is the largest and most labor-intensive of youth programs. While we have set goals to expand further into east county, high schools in those districts currently have neither the financial ability nor the administrative commitment to participate in this program. Continued expansion into east county should be by request only. Youth Programs might also work with Development and Marketing to find a sponsor for WITS residencies in east county, which would enable us to engage with high-need schools that are unable to participate for financial reasons.

We should work at creating other, more flexible forms of WITS, including WITS workshops at community organizations, shorter residencies for greater flexibility, and the development of focused residencies on themes that could be presented as stand-alone workshops.

Another potential program expansion could be in the area of summer camps/youth workshops. We should continue to investigate partnerships with local colleges or private schools. The goal would be to create an income source for Youth Programs, one that could be used to bring in exceptional WITS students on scholarship.

Other ideas include finding innovative ways to have ongoing relationships with outstanding WITS students. Sometimes the end of a residency can feel abrupt for both writer and student. Potential programs, such as a scholarship award for WITS student writers or piloting a summer WITS student internship at Literary Arts

(cross-programmatically, ideally) would give a next step for student writers.

We must also continue to support our WITS writers through professional development, one-on-one coaching, and flexible work. The WITS apprentice program for writers of color should seek out permanent funding and continue to professionalize to attract more applicants.

In 2016–2017, WITS staff trained in local nonprofit Education Northwest’s Youth Program Quality Assessment program. Though WITS will not be fully implementing this national program, we will be building their standards and practices into our standard assessments. An important project in the coming years will be to revise and create better assessments for all of our programming, based on continued engagement with Education Northwest, the Regional Arts & Culture Council, and other partners. WITS also needs to work on gathering better demographic data on who we serve and partner with, starting with surveying students at the start of the residency; PPS approval for this must be sought.

Finally, it is important that WITS continues to align with other teaching artist organizations, both locally and nationally, to ensure best practice and as a means of professional development for our staff and writers.

VERSELANDIA!

Verselandia! will also balance old and new in the years to come. The established participating schools will continue to run their individual slams. But outside PPS, we will be working to create an east county slam, in perhaps the biggest change to Youth Programs’ work.

This slam comes in response to repeated requests for participation in Verselandia! by east county schools. We will be seeking school support and locating additional partners for the east county slam in the coming year. Schools currently expressing interest in participating are David Douglas High School, Fir Ridge Campus, and Reynolds High School. With Parkrose and Gresham High Schools, that makes a five-school slam, hopefully debuting in 2019.

Youth Programs should look into sending student finalists to the national slam Brave New Voices. Doing so would not only improve the program quality of our

slam but also provide participating students with exposure to a wider world of slam poetry. It seems viable to find a sponsor for this relatively affordable opportunity for Portland youth.

To complete this work, Youth Programs will need to hire more staff: a part-time program specialist/slam expert who can work with both east county schools and with PPS schools that need assistance running their slams during times of staff turnover, low participation, and so forth. In addition, it would be helpful for Youth Programs staff to develop relationships with the local slam community.

STUDENTS TO THE SCHNITZ (STOS)

StoS is our most flexible program for outreach purposes. Youth Programs will continue to provide tickets to students from organizations outside PPS, such as community youth groups, as a means of engaging with potential new partners.

Youth Programs would also like to find a funder to provide additional books for participants in StoS; currently we can provide, at most, one book for every two participants.

We should also look at building a longer program day for students who travel from outside Portland. Ideas include having them visit the Portland Art Museum and/or the Central Library or Literary Arts for a writing workshop before the event.

Administratively, StoS needs to rethink and revise application deadlines for greater transparency and equity.

COLLEGE ESSAY MENTORING PROJECT (CEMP)

CEMP will continue to serve the same cohort of schools and will expand to serve more schools as requested. Though many administrators express interest, it has worked best for this program to have a specific teacher reach out to us with the commitment to bring students to the project.

Along the lines of community outreach, CEMP should explore having volunteers travel to community centers and after-school programs. This would increase the range of youth we reach and would be a service we could provide to new partners for a low cost and time commitment.

SUMMARY OF GOALS FOR YOUTH PROGRAMS

Develop an all-east-county Verselandia! poetry slam, including providing support to schools, locating additional partners, and developing relationships with the slam community. Send future Verselandia! finalists to the national slam Brave New Voices.

Seek partnerships with community youth organizations, especially those that serve youth of color. Use StoS for outreach. Pilot a program for CEMP volunteers to travel to community centers and after-school programs, and consider alternate forms of WITS for community organizations.

Work on gathering better demographic data for those we serve and partner with, creating better assessments for all programming and revising application deadlines for greater transparency and equity. Align with other teaching artist organizations, both locally and nationally.

Expand out-of-school experiences, including developing and piloting summer camps/youth workshops in partnership with a host site and building a longer StoS program day for students who travel from outside Portland.

Create a ladder of opportunities for young writers, including next steps for WITS student writers, such as internships, and the continuing professionalization of the WITS apprentice program for writers of color.

Find new ways to engage and employ WITS writers, by developing more flexible forms of WITS and offering more professional development and one-on-one coaching.

Be creative about our contributed and earned income: Look for a sponsorship for WITS residencies in east county, a scholarship provider for the WITS apprentice program, and a funder to provide additional books for participants in StoS. Consider new and more equitable fee structures, including offering a menu of Youth Programs services with different pricing levels.

OREGON BOOK AWARDS & FELLOWSHIPS

Landscape

BOOK AWARDS & FUNDING FOR WRITERS

There is only one other organization that awards monetary prizes to writers who are specifically from our region. The Pacific Northwest Booksellers Association (PNBA) awards authors and illustrators who live in Washington, Oregon, Alaska, Montana, Idaho, and British Columbia. An awards committee of booksellers chooses the winners, and there is no charge to nominate books. Authors of books selected for the PNBA awards receive \$500, and their book is publicized in PNBA materials as well as in marketing materials sent to bookstores. In the genre of youth literature, the Evelyn Sibley Lampman Award was established in 1982 to honor a living Oregon author, librarian, or educator who has made a significant contribution to Oregon in the fields of children's literature and library services. It is awarded annually by the Children's Services Division of the Oregon Library Association.

There are many awards programs around the country. Most function regionally, but there are a few big national programs: the National Book Awards, the Pulitzer Prize, the National Book Critics Circle Awards, the PEN America Literary Awards, and the American Library Association's Youth Media Awards.

In terms of grants for writers, there are only two other organizations in Oregon that offer significant financial support to writers and publishers: the Regional Arts & Culture Council (RACC) and the Oregon Arts Commission.

RACC's Project Grant Program provides financial support to Multnomah, Washington, and Clackamas County not-for-profit organizations and individual artists for project-based arts programming. Grants are awarded up to \$6,000 and are available in three categories: Artistic Focus, Arts Equity & Access, and Arts Services. There is no charge to apply. RACC also recognizes individual artistic achievement and excellence through its annual Individual Artist Fellowship. The fellowship includes a cash award of \$20,000. RACC offers fellowships to authors on a four-year, rotating basis with other arts. The Individual Artist Fellowship was deferred for 2009. There is no charge to apply.

The Oregon Arts Commission offers Career Opportunity Grants for artists, including writers, ranging from \$300 to \$1,500. There is no charge to apply. Literary Arts now administers their Individual Artist Fellowship Program for writers.

There are numerous national-level grants and fellowships. The most well known of these are given by the Guggenheim Foundation, the Lannan Foundation, the National Endowment for the Arts (NEA), and the MacArthur Foundation. These awards favor established writers. The Guggenheim discourages writers from applying who have not published a book.

The NEA awards fellowships in prose and poetry in alternating years; these awards are very competitive, and eligible writers must have a number of publication credits. The NEA does not distribute these fellowships equally across every region in the country. For example, in 2016, the NEA awarded 37 fellowships of \$25,000 each to prose writers, and in 2017, they awarded 37 fellowships of \$25,000 each to poets. None of the recipients in either year came from Oregon. Published writers with an established career are the most competitive applicants for an NEA fellowship; for most of Oregon's writers, an NEA fellowship is an elusive goal.

Individual fellowships help writers develop their artistic vision and work. However, the NEA is also a source of funding for many nonprofit organizations in Oregon that create literary programming and opportunities for writers and readers to build community, including Fishtrap, Literary Arts, the Regional Arts & Culture Council, Western Arts Alliance, and Caldera. The NEA also funds the Oregon Arts Commission, which in turn funds nonprofit arts organizations across the state and provides career opportunity grants to writers and other artists. Proposed cuts to NEA funding threaten to destabilize arts organizations and the communities they serve, and they make it even more important that other sources of funding are stable.

FREE LITERARY EVENTS

Since 2011, Literary Arts has partnered with several organizations and individuals to present free literary events in our event space. In 2015, we expanded to two event spaces, making it easier to host and promote local writers.

Throughout Portland, there is a greater number of free literary events than ever

before. On any given night, there is usually more than one literary event happening. Local writers have many opportunities for local exposure, although emerging writers have fewer opportunities. Literary events that take place in bars usually do not have a rental cost. For readings that take place at community centers or other venues, there is often a nominal rental fee.

In recent years, series such as Poetry Press Week (which first appeared at Literary Arts), De-Canon, and others have experimented with the ways readings are presented, including more media and collaboration with other art forms as part of their programming. Attention to inclusion and diversity in reading series has increased, especially since the 2016 presidential election, which brought to light the polarized nature of some community issues and created an increased urgency to provide a platform for marginalized voices.

WRITING CLASSES FOR ADULTS

The Attic, the Independent Publishing Resource Center (IPRC), Corporeal Writing, Mountain Writers Series, and other smaller organizations offer writing classes for non-degree-seeking adults. Most of these classes are open to anyone and range from 12 to 15 students. The Attic offers a five-month program called Hawthorne Fellows that has a competitive application process. Most of the IPRC's offerings focus on book making and letterpress, and they also offer a yearlong certificate program in creative writing or graphic novels. Portland and Mt. Hood Community Colleges also offer noncredit community education classes in creative writing.

Portland State University and Pacific University offer MFA programs in creative writing, though students must be enrolled in the program to take classes. Marylhurst University recently launched an MFA program with an emphasis on hybrid and experimental writing. In a 2017 survey of Literary Arts writing students, 38% said they have not received an MFA and were not considering applying; 20.5% said they were considering applying; and 37% said they had taken classes at the Attic previously. The response rate for this survey was 21%.

In general, adult learners differ from younger students in that they tend to be more goal-driven, focused on tasks, and motivated by intrinsic rather than extrinsic goals. Malcolm Knowles, an expert in andragogy, the study of teaching adult learners, says

in his book *The Adult Learner* “In contrast to children’s and youths’ subject-centered orientation to learning (at least in school), adults are life-centered (or task-centered or problem-centered) in their orientation to learning.”²³

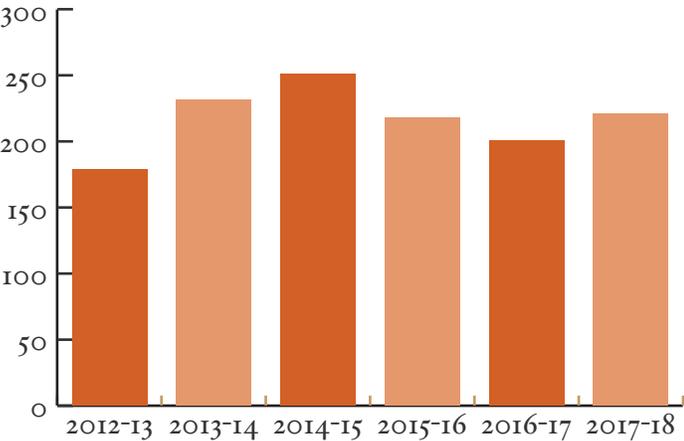
Current Platform

OREGON BOOK AWARDS

For the Oregon Book Awards, books may be submitted by the author, publisher, producer, or any member of the public. The entry fee was raised in 2017 to \$50, and four copies of the title must also be submitted. Self-published books are eligible as long as they have an ISBN; an ISBN is used for book distribution and sales. Graphic literature and plays that have been produced or had a staged reading are eligible in alternating years.

Out-of-state judges, usually writers of national reputation, choose the finalists and winner in each genre. In 2018, for the first time, the judging process for each genre consisted of a panel of three judges. Oregon Book Award winners received \$1,000 each in 2018, an increase from the \$500 prize that had been awarded for the last 10 years.

The number of books and genres submitted in the past six years are as follows:



23 Malcolm Knowles, *The Adult Learner* (City of publication, State: Name of publisher, 2015).

Fiction and poetry consistently receive many more submissions than other genres. For example, there were 58 submissions in fiction and 17 in creative nonfiction for the 2018 Oregon Book Awards. In 2017, for the first time, a self-published book was selected as a winner of an Oregon Book Award: *A Great Length of Time* by Joyce Cherry Cresswell received the Ken Kesey Award.

SPECIAL AWARDS

In addition to awards for published books, special awards are given every year in recognition of significant contributions to Oregon's literary community or young readership. These awards do not include a cash prize. The Oregon Book Awards & Fellowships Advisory Council reviews letters of nomination and recommends recipients to the board. Anyone from the community may nominate someone for an award.

OREGON BOOK AWARDS CEREMONY

The Oregon Book Awards ceremony has taken place at Portland Center Stage since 2009. In 2016–2017, we sold 373 tickets to the awards ceremony for a total income of \$8,081, the most in recent years, even though the host did not have strong name recognition. This would indicate that ticket buyers for the ceremony are not strongly motivated to attend based on the celebrity of the host. More likely, they are friends and family of the finalists, authors themselves, and others who value the Oregon Book Awards ceremony as a gathering for and celebration of Oregon's literary community.

OREGON BOOK AWARDS AUTHOR TOUR

The Oregon Book Awards Author Tour brings authors to communities around the state, with an emphasis on underserved communities. The tour facilitates interactions between communities and book awards authors through readings, school visits, and free writing workshops. In 2016–2017 and 2017–2018, for the first time, Literary Arts presented staged readings of plays by finalists as part of the tour. The audience turnout for staged readings in 2017–2018 was higher than author readings. The performance of *Berlin Diary* in Eugene was attended by 120 people; most tour readings have an average attendance of 25–30.

The events that generate the most attendance for the tour are school visits and readings where Literary Arts partners with established reading series, such as Fishtrap Fireside in Enterprise or Ales & Ideas in Astoria. The uniqueness of the programming and the per capita attendance are also important ways of assessing the impact of the tour. For example, for some schools the only author visit they have for the year is a visit from an Oregon Book Awards author.

Tour events are planned to visit various parts of the state, including Eastern Oregon, Central Oregon, Southern Oregon, The Willamette Valley, Central Coast, and Northern Coast regions.

OREGON LITERARY FELLOWSHIPS

In 2009, Literary Arts established the Brian Booth Writers' Fund to be a permanent source of funding for the Oregon Book Awards & Fellowship program. The endowment ensures stable funding for the program that is not dependent on arts funding on a national or local level, or on the Literary Arts budget priorities in any given year.

Due in part to the establishment of the Booth Fund, the number of awards and amounts awarded for individual fellowships has increased in the past several years. For comparison, in 2011–2012, \$31,500 total was awarded in fellowships and prizes for Oregon writers. In 2017–2018, \$57,000 total will be awarded in fellowships and prizes for Oregon writers.

There is no charge to apply for an Oregon Literary Fellowship (OLF); the application fee can sometimes be a barrier for writers when applying for funding. After preliminary judging by one judge in each genre, a panel system for final judging in fiction, nonfiction, and poetry is employed. Fellowships for publishing, young readers, and drama are decided by separate judges. The process is competitive: Roughly 3% of writers who apply for a fellowship are awarded one. By comparison, about 15% of the books submitted for consideration for an Oregon Book Award are selected as finalists, and roughly 3% of the books are selected as winners.

In 2015, Literary Arts initiated the Writers of Color Fellowship to address a lack of diversity in the writers served by the Oregon Book Awards & Fellowships program. Historically, fewer than 1% of Oregon Book Awards finalists have been writers of

color, and even fewer writers of color have won an Oregon Book Award. This lack of diversity in the Oregon Book Awards (OBA) authors is confirmed by a 2016–2017 OBA demographics survey, where 91% of the respondents indicated they were white; in a survey of 2017–2018 OBA applicants, 90% indicated they were white.

In light of the fact that 25% of OLF recipients go on to be OBA finalists, establishing the Writers of Color Fellowship is one way to have an eventual effect on the overall diversity of writers who publish books that are eligible for an Oregon Book Award. In the first year of offering the fellowship, we received 46 applications from writers of color; in 2016, we received 54; and in 2017, we received 48.

The creation of the Writers of Color Fellowship has also had an overall effect on the diversity of the fellowship recipients. In 2016–2017, we awarded nine fellowships to writers; five of those writers applied for the Writers of Color Fellowship. It should also be noted that the OLF demographics are more diverse than those of the OBA applicants. In a 2016–2017 survey, 85% of respondents indicated they were white, and in a 2017–2018 survey, 80% of respondents indicated they were white.

Fellowship Applications for 2012–2018

Year	Fellowship applications	Writers of color applications	Percentage of writers of color applications	Publisher applications
2012–2013	355	—	—	18
2013–2014	288	—	—	20
2014–2015	445*	—	—	20
2015–2016	381	46	12%	15
2016–2017	430	54	12%	19
2017–2018	401	48	12%	12

** In 2014–2015, we announced an additional \$30,000 to be distributed in recognition of our anniversary year and the establishment of the Brian Booth Writers’ Fund.*

In 2016–2017, Literary Arts started a partnership with the Oregon Arts Commission to award an additional two fellowships each year with funding from the commission. In 2017–2018, a new fiction fellowship was started with a bequest from Laurell Swails. The Laurell Swails and Donald Monroe Memorial Fellowships in Fiction will fund two additional fiction fellowships.

EVENTS AT LITERARY ARTS (@LITERARYARTS)

Literary Arts partners with other organizations and individuals throughout the year to host free literary events. In 2015–2016, we hosted 24 events, and in 2016–2017, we hosted 40. We have 34 events scheduled so far for 2017–2018. Literary Arts is home to five regular series: Unchaste, PDX Jazz, Liars’ League PDX, Incite, and One Page Wednesday. The average attendance at @LiteraryArts events is 50; in 2016–2017, the total attendance for all @LiteraryArts events was 1,850. Many of these audience members are people whom the organization does not interact with otherwise, and approximately one-third of the audience members at most of these events are engaging with Literary Arts for the first time. Our event partners curate and promote their events; they are not charged to use the event space, and Literary Arts provides a cash bar and free food. These partnerships increase capacity for literary programming and opportunities for writers to present work, and they contribute to the vitality of Portland’s literary culture.

At least one of these criteria is usually met when selecting partners and events for @LiteraryArts:

New audiences: Organizations that bring in audiences that Literary Arts does not interact with much otherwise

Diversity, equity, and inclusion: Partnerships with writers of color or culturally specific programming

OBA/OLF writers: Opportunities to present OBA/OLF writers

Local or regional community connections: Partnerships that bring together diverse groups of people and/or highlight exceptional work being done on a local or regional scale

Professionalism: Local and national partnerships with mostly established organizations with experience in polished curation and presentation

Exceptionalism: Partnerships that allow @LiteraryArts to present authors with national reputation

Innovation: Local and national partnerships with organizations that may be new or trying something different (e.g., Liars’ League PDX, Poetry Press Week)

WRITING CLASSES AT LITERARY ARTS

In 2012, for the first time, Literary Arts offered writing workshops taught by Oregon Book Awards authors. Our offerings have grown since the first year, and in order to further increase our reach, our classes are geared toward all levels of writers.

There is not currently an application process for any of our classes, and writers self-select for the level of classes they take. In the first year that classes were offered, it was anticipated that they would be of particular interest to OLF and some OBA writers. However, for the past three fiscal years, only 1% of OBA applicants enrolled in classes, and only 2% of OLF applicants enrolled. In 2016–2017, 40% of the students had not previously interacted with Literary Arts before enrolling in a class (although they may have attended @Literary Arts events). The most popular classes have been Writing a Novel in 8 Weeks and Memoir Bootcamp. The popularity of these classes might reflect the notion that adult learners are “task-centered” and “problem solvers” in their approach to learning.

In 2017–2018, Literary Arts offered two new yearlong classes in writing a novel and writing a memoir. Both classes sold out quickly. We also created a dedicated mailer for writing classes and Delve seminars.

The following table shows the growth in writing classes since 2013–14.

Year	Students	Classes	Tuition income	Students growth	Income growth	Class growth
2013–2014	89	12	\$20,210			
2014–2015	188	18	\$33,425	111.24%	65.39%	50.00%
2015–2016	268	27	\$51,535	42.55%	54.18%	50.00%
2016–2017	254	23	\$40,880	-5.22%	-20.68%	-14.81%
2017–2018	441	45	\$76,327	73.62%	86.71%	95.65%

Average growth in number of students per year: 55%

Average growth in number of classes per year: 45%

Average growth in tuition income per year: 47%

Survey Feedback

Question: Which answer best describes the impact that the Oregon Book Awards & Fellowships program has had on your writing life?

Choices: Negative impact, no impact, somewhat positive, very positive

Survey year	Surveyed	Responded	Response rate	Somewhat positive	Very positive
2012	280	145	51%	41.2%	48.6%
2016	299	85	28%	37%	54%
2017	304	75	24%	27%	64.8%

The percentage in the “very positive” category has increased. However, the response rate has also decreased.

Question: Please rate the value of these activities of the Oregon Book Awards & Fellowships program.

Choices:

Awards monetary prizes to writers

Recognizes writers, apart from monetarily, for their literary excellence

Increases career opportunities for writers

Raises awareness of Oregon’s literary community

Promotes reading as an important cultural activity

Strengthens connections between Oregon’s writers

Strengthens connections between Oregon’s writers and their audiences

Tours the state with Oregon Book Awards authors

Offers tuition-based writing classes at Literary Arts in downtown Portland

Offers free literary events at Literary Arts in downtown Portland

Survey year	Surveyed	Responded	Response rate	Top activity: #1 choice	Top activity: #2 choice
2012	280	145	51%	Awards money to writers	Recognizes writers, apart from monetarily, for their literary excellence Raises awareness of Oregon's literary community
2016	299	85	28%	Recognizes writers, apart from monetarily, for their literary excellence	Awards money to writers Raises awareness of Oregon's literary community Promotes reading as an important cultural activity
2017	304	75	24%	Awards money to writers	Recognizes writers, apart from monetarily, for their literary excellence Offers free literary events at Literary Arts in downtown Portland

Question: Please rank the following proposed resources that Literary Arts might provide for the writing community in the future, in terms of their value.

Choices:

Awarding more Oregon literary fellowships for smaller amounts

Awarding fewer fellowships for larger amounts

Awarding a fellowship that is specifically for writers under 35

Awarding a fellowship that is specifically for emerging writers who have not published a book

Opportunities for writers to informally meet with Portland Arts & Lectures authors

Small tuition-based master classes taught by nationally recognized authors

Opportunities for writers to meet with publishing industry professionals

Survey year	Surveyed	Responded	Response rate	Top activity: #1 choice	Top activity: #2 choice
2012	280	145	51%	Opportunities for writers to meet with publishing industry professionals	Opportunities for writers to informally meet with Portland Arts & Lectures authors
2016	299	85	28%	Opportunities for writers to informally meet with Portland Arts & Lectures authors Opportunities for writers to meet with publishing industry professionals	Small tuition-based master classes taught by nationally recognized authors Awarding a fellowship that is specifically for emerging writers who have not published a book
2017	304	75	24%	Opportunities for writers to informally meet with Portland Arts & Lectures authors	Awarding fewer fellowships for larger amounts Awarding a fellowship that is specifically for writers under 35

Question: Describe your opinion of the current state of the Oregon Book Awards & Fellowships program.

Choices:

The program should not make any changes.

The program should make some changes.

The program should make significant changes.

Survey year	Surveyed	Responded	Response rate	No changes	Some changes	Significant changes
2012	280	145	51%	30%	52%	2.7%
2016	299	85	28%	24%	60%	1.1%
2017	304	75	24%	27%	43%	2.7%

Most changes across years are focused on:

Changing the judging process

More attention to statewide outreach

Changing amounts or types of fellowships

Overall, the OBA authors and OLF recipients respond favorably when asked about the impact of the program on their writing careers. In 2017, 66% of writers surveyed said the Oregon Book Awards program has had a very positive impact on their careers. In the past three years, the aspects of the program that writers surveyed have indicated are the most important have remained consistent:

Awarding monetary prizes to writers

Recognizing writers, apart from monetarily, for their literary excellence

Raising awareness of Oregon's literary community

Strengthening connections between Oregon's writers and their audiences

Next Evolution

The broad goals of the Oregon Book Awards & Fellowships program are to support, promote, and celebrate Oregon’s writers and publishers. The program provides financial recognition to Oregon authors, funds the creation of new work, expands the audience in Oregon for high-quality work by Oregon writers, and reinforces the connection between communities and their artists.

Going forward, the program should build on its strengths:

- Awarding monetary support to Oregon’s writers

- Recognizing literary merit in published and emerging writers

- Offering high-quality, tuition-based writing instruction to Oregon’s writing community

- Providing a venue for writers at all stages of their careers to share their work

- Partnering with local and national organizations and reading series to create new connections between Oregon’s writers and the larger literary community

- Offering targeted rural outreach to underserved communities around the state

OREGON LITERARY FELLOWSHIPS

The program should consider offering two to three more significant monetary fellowships at a different time of year with a different application cycle than the smaller fellowships. For example, the program could award 10 fellowships of \$4,000 each year, and 2 fellowships of \$15,000 each year. The larger fellowships could have a more profound effect on particularly accomplished writers’ careers, while the smaller fellowships could continue to support emerging and established writers.

The program could offer a dedicated fellowship for “emerging authors” who have not yet published a book. This would allow emerging writers more access to fellowships, as they would not be competing against writers who are more established.

OREGON BOOK AWARDS JUDGING AND CEREMONY

The judging system for the Oregon Book Awards was changed in 2018 to feature three judges per genre. The judging system should remain in place for at least three more years to gauge its impact. The book awards competition should strive to be responsive to the literary community of Oregon. For example, an increase in publication of hybrid texts might eventually lead to an Oregon Book Award or fellowship specifically offered in that genre.

The ceremony should continue as a celebration of Oregon's literary community, hosted by a national or well-known regional author, with a diverse lineup of presenters and performers.

OREGON BOOK AWARDS AUTHOR TOUR

The Oregon Book Awards Author Tour is an important part of the program, as it connects writers to communities, particularly those in rural Oregon, that they might not visit otherwise, and brings literary programming to underserved communities. The impact of the tour is measured not only by the attendance at events but also, perhaps more intangibly, by the overall reputation of the program. As mentioned earlier, written comments from surveys of Oregon's writers often mention the tour and the importance of state outreach as an important part of the Oregon Book Awards & Fellowships program.

The Oregon Book Awards Tour should continue to visit at least four different parts of the state each year, selected from at least four of these regions: Eastern Oregon, Central Oregon, Southern Oregon, the Willamette Valley, the Central Coast, and the Northern Coast.

Activities that invite community participation and engage different audiences should be emphasized, including writing workshops, open mics, community engagement, and school visits.

WRITING CLASSES

Predicting growth requires some guesswork: Since the writing classes are still developing, there are only a few years of data to draw on. The 2017–2018 year has seen rapid growth in number of students and earned income, but the year before had less impressive growth.

However, for the next three years, the program could reasonably anticipate a 5%–9% increase in the number of classes and students each year. By FY 2020–2021, this could mean 500–560 students per year, 50–62 classes each year, and \$79,800–\$97,000 tuition income per year.

The growth in classes should be focused on attracting new students and increasing student retention in the following ways:

- Providing high-quality instruction, with experienced teachers, small class sizes, and clearly articulated class outcomes

- Building community among the students with readings for students and opportunities to attend Literary Arts events

- Emphasizing fiction and memoir classes

- Responding to current trends in literature (multigenre, lyric essay, experimental)

- Providing a variety of entry points for all levels of writers

- Experimenting with tiered and advanced classes

- Building a reputation for offering classes for advanced study

This growth in the writing classes also depends on resources for staffing, since there are many aspects of the Oregon Book Awards & Fellowships program that also require administrative and programmatic resources.

Survey Data from Writing Students

In a 2018 survey, 44% plan on taking another writing class, 41% said they might take a class, 9.4% were neutral, and 1.8% said it was highly unlikely.

In the same survey, 45% of the students surveyed described themselves as intermediate writers, and 19% described themselves as advanced. In 2017, 43% described themselves as intermediate, and 17.9% described themselves as advanced.

Also in the 2018 survey, the choices for future options that received the highest rankings were as follows:

- One-on-one individualized feedback on your writing with an instructor at Literary Arts

An advanced class that required students to submit a manuscript and application before being admitted

Advanced writing classes in a genre you're interested in

@LITERARY ARTS

The number of events at Literary Arts has grown from 14 events in 2013–2014 to 43 events in 2017–2018. @LiteraryArts events should continue their emphasis on developing new audiences and deepening local or regional community connections. They should also prioritize partnerships and events that results in culturally specific programming and opportunities for writers of color and consider adding two to three off-site events with other local organizations to reach new audiences.

By 2021, @LiteraryArts events should offer between 25 and 35 events a year, with 15% focusing on culturally specific programming and 10% of the events being partnerships with national organizations.

DIVERSITY, EQUITY, AND INCLUSION

Oregon is becoming more diverse. According to *The Oregonian*, a 2015 report titled *States of Change* predicts that in Oregon, “by 2060, nearly 40 percent of the electorate will be nonwhite, more than double its current mark of about 16 percent.”²⁴

To expand our commitment to diversity, equity, and inclusion, and to serve a population that is increasingly diverse, the Oregon Book Awards & Fellowships program should

increase the number of applicants for the Writers of Color fellowship to 15%;

consider establishing a larger monetary award for an additional fellowship for writers of color;

continue to provide scholarships for our classes, and by 2021, award scholarships to 15% of our students, with an emphasis on scholarships for students who have not taken classes with us before;

24 https://www.oregonlive.com/mapes/index.ssf/2015/04/a_graphic_look_at_oregons_more.html

Experiment with programming classes that are specifically for writers of color, taught by writers of color;

Apply an equity lens when hiring judges and writing instructors and strive to have 20% of our judges and instructors be writers of color; and

Engage diverse communities through @LiteraryArts programming and other activities, to broaden our network and relationships with communities of color.

TARGETED GOALS FOR THE OREGON BOOK AWARDS & FELLOWSHIPS PROGRAM

By FY 2020–2021, class enrollment will grow to 500–560 students in 50–62 classes with \$79,800–\$97,000 in earned income.

By 2021, award scholarships to 15% of our students, with an emphasis on scholarships for students who have not taken classes with us before.

Offer two larger Oregon Literary Fellowships by 2021, awarding at least 10–12 fellowships of \$3,500 and 2 fellowships of \$15,000.

Continue to expand outreach to communities of color through @LiteraryArts programming and promotion of the Writers of Color Fellowship, with 15% of fellowship applicants in 2021 applying for the Writers of Color Fellowship.

Create connections with Oregon Book Awards authors and other readers and writers, around the state and nationally, through the Oregon Book Awards Author Tour, events at Literary Arts, participation in national conferences, and meetings with Portland Arts & Lectures visiting writers.

Respond to current trends in literature, offering classes in hybrid forms and experimental writing and considering new genres for fellowships and book awards as interest or demand rises.

By 2021, @LiteraryArts events should offer between 25 and 35 events a year, with 15%–20% culturally specific events and 10%–15% in partnership with national organizations.

DELVE READERS SEMINARS

Landscape

Discussion groups and clubs centered around books continue to be an important organizing principle in many communities across the country. Locally, Powell's hosts in-store discussion groups and offers readers' resources both in-store and via their website. Multnomah County Library hosts free book groups in the form of Everybody Reads, Pageturners, Family Book Groups, and other programming. Portland is also home to many small-scale literary series and arts groups that host literary discussion events, work groups, and reading events highlighting upcoming authors. Many of these discussion forums are making efforts to engage diverse and multicultural literary perspectives (as evidenced by topics such as "Muslim Journeys" in the library's book group programming). Neighborhood and informal book clubs abound in and around Portland. Such reader forums serve as a significant force in the publishing economy while also growing the cultural capital of our communities. On a related spectrum, continuing education and college programs offer literature courses through often costly or cumbersome institution-based registration processes.

Current Platform

Delve serves readers who want to engage in literary discussions at a more involved level than most organized book clubs can offer, but with easier access than most university or continuing education programs can provide. Delve seminars are small-group (up to 16 participants) discussion-based forums, led by experienced scholars, that usually run four to six weeks in length, meeting once per week.

The Delve program has been active since 2005 and has seen steady growth since 2008–2009, both in number of seminars offered and number of registrants per season.

Year/Season	Number of Delve seminars offered	Number of registrations per season (includes Access Rate registrations)
2008–2009	5	89
2009–2010	8	119
2010–2011	14	223
2011–2012	16	201
2012–2013	13	114
2013–2014	15	206
2014–2015	18	244
2015–2016	21	259
2016–2017	19	204
2017–2018	19	279

Seminar offerings in the past focused foremost on classic authors and texts but have become more diverse in recent years to engage readers with both classic and contemporary authors, authors of color, works in translation, and topics that reflect the diverse, dynamic climate of our current culture. For example, top-selling Delves in the current 2017–2018 season included seminars on the works of Vietnamese American novelist Viet Thanh Nguyen and African American essayists and novelists Jesmyn Ward and James Baldwin.

At present, Delve participants (“Delvers”) are primarily white, middle-aged professionals or retirees with means to register at a competitive tuition fee, but the program has been working to include—and create access points for—younger and more diverse groups of participants.

Access points are offered in the form of volunteer positions, either as a scribe (writing seminar summaries for the Delve blog) or a liaison (performing light hosting duties, such as opening and closing the facility). Access points are offered also in the form of discounted tuition spots (through scholarships or our Access Rate program).

We have gathered the following statistics from a demographic survey conducted in early 2017 (for participants of the 2016–2017 season) through an RACC Community Database target resource group:

68% of Delve constituents earn less than \$100,000 annually (this is up from 61% in the 2013 TRG report).

44% are married or inferred married; 46% are single or inferred single.

63% have completed college or hold a graduate degree.

32% are men, 68% are women.

73% are 50 years old or older; 14% are below 40 years old.

Almost all Delve participants (94%) are Caucasian.

*Note that these statistics are based on the listed head(s) of household, which may not reflect individual constituents.

In FY 2010–2011, with the intent to promote crossover between Delve and Portland Arts & Lectures audiences, Literary Arts piloted Delve for Subscribers, a benefit offered to Portland Arts & Lectures subscribers to attend complimentary presentations on the works of Portland Arts & Lectures speakers, led by an appropriately credentialed guide. Delve for Subscribers ran until 2014–2015; as a program, it saw steady growth and positive engagement but was ended because it reflected a small percentage of crossover between the programs and served many of the same people repeatedly.

In 2012–2013, Delve was given its own marketing budget of \$3,000, a first for the program. This allotment continues up to the present, complemented by increased time and support from the marketing staff, which has resulted in added social media marketing, targeted emails, and a print brochure (implemented in the 2017–2018 season) sent to over 5,000 households.

Next Evolution

We will continue to expand the Delve brand, working to attract younger participants and groups that are more diverse while also maintaining and cultivating the existing Delve community. Through expanded diversity in programming, expanded diversity in guide hires and seminar volunteers, and through our Access Rate program, we will work to further diversify the culture and demographics of the Delve program. Moving forward, Delve seminars should strive to engage with people from communities of color; young professionals in their 30s and 40s;

recent college graduates; adults with children; and people from different Portland neighborhoods (more on location accessibility below). Cultivating the Delve blog as an online space where discussion can continue and reader resources can be shared will also help enrich Delvers' experience and expand the reach of the Delve program.

In 2017–2018, we presented a goal of programming 70% “classics” and 30% “new” seminar topics. (Delve has thus far categorized classics as being works considered canonical to Western culture—the “great books” of which have traditionally drawn from a roster of widely celebrated European and North American authors, with emphasis on works written prior to the 20th century; new seminar topics include contemporary—late 20th century and 21st century—authors, writers of color, new literary genres, and thematically oriented seminars.) Our actual 2017–2018 roster ended up reflecting closer to 60% classics and 40% new topics, and met with high demand (sold-out seminars) for seminars on writers of color, topics dealing with race and multiculturalism (seminars for James Baldwin, Jesmyn Ward, and Viet Thanh Nguyen sold out quickly), as well as “new genre” interest (our visual storytelling seminar also sold out). A short list of the top-selling seminars from our 2017–2018 season offers a glimpse of the range and diversity of literature that Delvers were eager to engage with:

“War, Memory, Imperialism” (Viet Thanh Nguyen/fiction, nonfiction)

“Embolden Your Reading” (multiple authors and genres; all works by authors of color)

“Herodotus: The Histories” (Herodotus/Greek history)

“One Nation Still on Fire” (James Baldwin, Jesmyn Ward/nonfiction)

“LGBT Canon: Forster’s Maurice” (E. M. Forster/fiction)

“Say My Name: Breaking Bad” (visual storytelling/TV show)

We believe the popularity of these new seminar topics, alongside several key classic seminar topics, reflects the expanding interests of the Delve readers, showing that they are a community that wishes to engage with literature in terms of its broader aesthetic-cultural value, as well as its current social contexts. Moving forward, Delve will aspire to 50% classics and 50% contemporary seminar topics by 2021, to reflect

equity and continued responsiveness to the evolving literary and cultural landscape.

While the Delve program will continue to rely primarily on tuition-based income, we must also explore ways to keep price points affordable for lower-income communities. The Access Rate program currently allows, at minimum, one to two discounted tuition spots per seminar; Delve will explore (with the help of the Development team) the potential for receiving contributed income to make this Access Rate program ongoing and sustainable. In 2016–2017, Delve offered 11 scholarship spots; in 2017–2018, Delve offered 20 Access Rate spots. At an average cost of \$200 per seminar registration, the Access Rate program would require about \$5,000 to fund 25–30 Access Rate spots. Delve will aspire to offer 35–40 Access Rate spots by 2021, reflecting a goal of granting Access Rates to 10%–15% of total participants (at a total cost of about \$7,500–\$8,000 for the Access Rate program by 2021).

In 2017–2018, we made a concerted effort to reach out to communities of color, offering Access Rate registrations in some seminars, and were met with positive feedback and new participants in the Delve program. In 2017–2018, 16 out of 20 individuals (80%) who registered for Access Spots were brand-new participants to the Delve program; this should stand as an indicator of how the Access Rate program helps attract new participation and grant access to Delve seminars. Moving forward, we will continue to build on this tone of inclusivity and accessibility in ways that are feasible and sustainable for the program. Delve will also explore ways to offer some seminars at regular reduced rates—for example, seminars targeted to younger participants, people of color only, and/or participants from other lower-income communities.

Three-year projections (stretch goal)	2016–17	2017–18	2018–19	2019–20	2020–21
Number of seminars held	19	20	23	25	27
Number of regular-tuition registrations	193	214	245	265	285
Number of Access Rate registrations	11	20	30	35	40
Earned income from registrations	\$37,390	-\$42,000	-\$55,000	-\$55,500	-\$56,000

Delve has been in a transition phase since hiring a new program specialist midway

through the 2016–2017 season and beginning to experiment with new programming in 2017–2018. Through the upcoming three-year period, assessment of program factors—that is, number of seminars or program size, tuition rates, seminar class sizes, guide fees, marketing and programming content—will be ongoing in order to arrive at the most beneficial target numbers and structure for the Delve Readers Seminars program.

It should be noted that the primary goal for Delve in the next three-year period should be to arrive at a sustainable budget growth model, one that would have the program maintaining yearly earned income totals in the average range of \$55,000 (from tuition registrations). We have a substantial amount of growth from earned income that we are aiming for, especially between 2017–2018 and projections for 2018–2019; depending on how the program earns in 2018–2019, we are aspiring to a 2%–4% growth rate in the 2019–2020 and 2020–2021 seasons.

Delve’s service area will continue to be mostly based out of the Literary Arts center in downtown Portland, with some collaborative seminars hosted nearby at the Portland Art Museum. Up until 2017–2018, Delve has offered one to two seminars per season at off-site locations, most regularly at the Portland Art Museum. In 2018–2019, a new effort to add another partner location (most likely in the Mississippi district) for hosting two to three Delve offerings will be piloted, as a means of expanding Delve’s reach and encouraging greater diversity. Although Delve seminars held at Literary Arts downtown are already attended by Portlanders who reside on the east side of the city, adding an eastside partner location may still attract new participants—for example, those who live closer to the Mississippi district or who may find commuting there to be more convenient due to traffic patterns and parking costs. Counting the seminars hosted at the Portland Art Museum and at the eastside location means that approximately 17%–20% of our 2018–2019 seminars may be hosted off-site. We will also continue to tie some Delves to Special Events—such as Delvers on occasion receiving (with seminar registration) a ticket to a Portland Arts & Lectures author event or to an Everybody Reads author event; Delve tie-ins may also involve partnership visits to other organizations, such as an art exhibit at the Portland Art Museum, or a visit to other community organization events.

To deepen the relationship between Delve and the rest of Literary Arts’ programs,

starting in 2018–2019 the Delve program will be working in closer alignment with the writing classes, in order to increase consistency and efficacy for the Delve program. The goal here will be to gradually move Delve from being perceived as a niche educational offering (reflected in its demographics to date) to a more visible, established community education forum, of interest to both readers and writers.

In 2017–2018, we have piloted/are piloting several new types of Delves, including one seminar on visual/cinematic storytelling (a Delve on the TV program *Breaking Bad*), which has sold out, and several Delves addressing social issues (e.g., a James Baldwin and Jesmyn Ward seminar focused on reading about race and society; an “Embolden Your Reading” seminar focused on diversifying one’s reading list) that have also resulted in sold-out classes. In 2017–2018, we are also launching our first “experiential learning” Delve (“Refugees and Storytelling”) that uses an award-winning novel as a jumping-off point to engage with stories about refugees and migration in our local community. Moving forward, we should continue to develop Delve programming that responds to current interests and social concerns while meeting our Delvers where their needs as readers can be most effectively valued, nurtured, and enriched. Delve’s foremost goals in the upcoming three-year period involve modest program growth; stabilization of the budget model; increasing diversity, equity, and inclusion; and expanding programming content. Delve’s mission will continue to be cultivating readers and helping them engage and build community, with empathy and great enthusiasm, around important works of literature.

SUMMARY OF DELVE READERS SEMINARS GOALS

Increase Delve earned income from registrations to about \$55,000 yearly or to an amount assessed as sustainable by how the program performs from 2018 to 2021.

Continue to expand programming content to reflect diversity and evolving literary landscape. By 2021, Delve should reflect 50% contemporary seminars and 50% classics seminars.

Continue outreach to communities of color, younger participants, and new potential participants, aspiring to attract a total of 40% new participant registrations by 2021.

Develop the Access Rate program to be able to fund 35-40 Access Rate spots per season by 2021.

Explore new partner locations.

Explore new experiential community education formats.

THE ARCHIVE PROJECT

Landscape

Like all our media, radio is in a period of upheaval, change, and transition. Digital platforms such as Apple Podcasts have transformed the way people consume audio content. The advent of inexpensive and widely available audio editing software has lowered the barrier to entry, allowing anyone with a laptop and a good microphone to make professional-sounding audio. However, traditional radio has not, by any stretch, died, though it is being challenged by digital content, especially as newer cars are outfitted with digital compatibility and smartphones become ubiquitous.²⁵ Locally, our own Oregon Public Broadcasting (OPB) has risen to even greater prominence, particularly in the area of hard news, as *The Oregonian* has slipped. With literally thousands of podcasts available on every imaginable subject, most have tiny audiences, and many are made by amateur hobbyists and may be low quality. While technical challenges are more easily solved, the more difficult work of making substantive and compelling narrative is the challenge, a difficulty often undervalued or taken for granted. An additional challenge for all content makers is building an audience in such a crowded field. Further complicating this is the fact that the most dominant platform, Apple Podcasts, is an opaque system: It is difficult to market your product, which must be done via managing and mastering their algorithms, which are not plainly stated and are tied to likes, comments, ratings, and so forth.

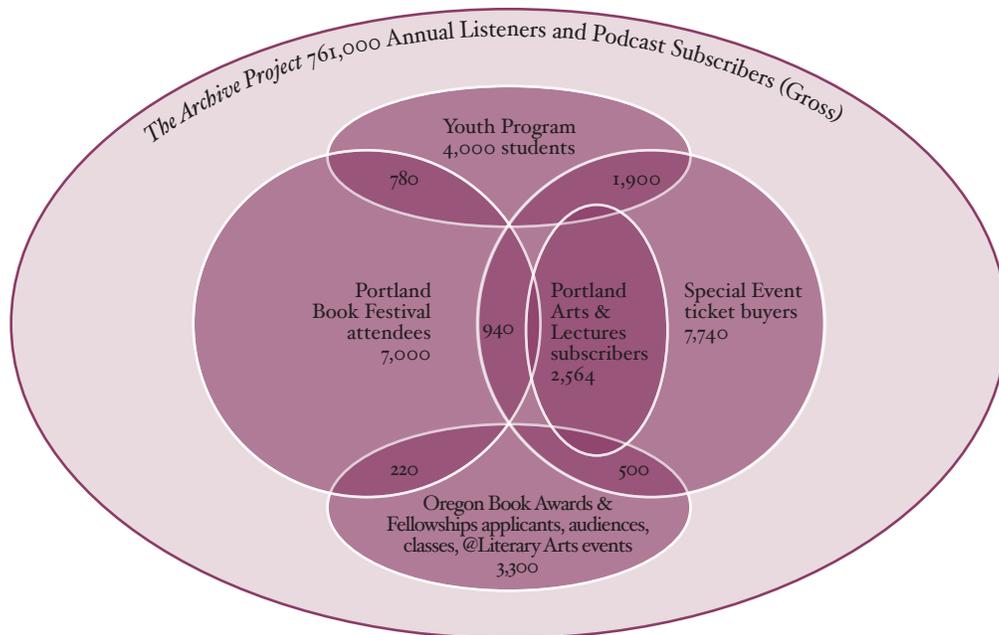
There are three main formats in which book and book-related podcasts are produced. There are the traditional interview format shows that are built around a journalist or media personality, for example, Michael Silverblatt's *Bookworm* and Terry Gross's *Fresh Air*. These are typically generated from a traditional broadcast station. There are also shows in which a live event is captured and is usually less journalistic in nature. *City Arts & Lectures* in San Francisco, the *TimesTalks* in New York, or the live webcast's of 92nd Street Y are all examples. And finally, there are digest shows, which are usually podcast only, like the New York Times *The Book Review* podcast. There are many of these out in the world, though it is impossible to gauge their popularity because, again, Apple does not make subscription numbers public and because these shows come and go with great frequency. As noted, some of these shows are born on traditional radio, and some are born in the digital realm.

25 <https://www.entrepreneur.com/article/306174>;
<http://variety.com/2017/music/news/traditional-radio-faces-a-grim-future-new-study-says-1202542681/>

Current Platform

The Archive Project consists of recordings of Literary Arts’ events (Portland Arts & Lectures, Special Events, the Portland Book Festival, and others) repackaged and produced for radio. The events are drawn from the archive of more than 30 years of recordings and from events that are currently being produced.

In 2011, OPB began to broadcast the occasional lecture from the current season of Portland Arts & Lectures when we could get the rights. Then, in 2013, the idea for *The Archive Project* was conceived to help celebrate the 30th anniversary of Literary Arts in 2014. A large administrative effort began to secure all the rights to the full archive of lectures going back to our first year, 1984.²⁶ Originally, *The Archive Project* had the tagline “30 lectures, in 30 weeks, to celebrate the 30th anniversary of Literary Arts.” The show was to run for one season and then conclude. However, after a few months of broadcasting, the ratings were strong enough that this tagline was dropped and the show was made a year-round fixture of OPB’s programming. Now in its fourth season, *The Archive Project* has between 12,000 and 15,000 broadcast listeners per week in Oregon and Southwest Washington and about 5,000 podcast listeners and is downloaded more than 40,000 times a year online.



26 Tapes and other files had all been fully digitized sometime before 2009. All of the original recordings are now held by the Special Collections department of the Multnomah County Library.

The collaboration with OPB is simple. They provide technical and curatorial guidance, along with, of course, their huge broadcast platform, where the show finds the vast majority of its listeners. Literary Arts pays a producer, Crystal Ligor, as an independent contractor to produce the show. Andrew Proctor chooses the lineup for each season in addition to hosting and writing copy for each episode. Megan Gex manages our digital presence online. India Hamilton coordinates and writes web copy. It should be noted that no money changes hands between OPB and Literary Arts.

We currently broadcast on Wednesdays at 10:00 p.m. and podcast each show simultaneously. Shows are 53 minutes in length. Our season runs October through May, and we go into rebroadcasts over the summer. We produce on an ongoing basis, with the fall programmed heavily to support the Portland Book Festival before the event and a mix of new and archival lectures, conversations, or panel discussions throughout the winter and spring. Occasionally, Literary Arts conceives and makes a show from scratch (as opposed to repackaging a live event). Examples include the “Everybody Reads/The Book of Unknown Americans” episode (March 2, 2016), or the episode about Verselandia! 2016 (April 5, 2017).

From a mission perspective, *The Archive Project* is unique within our suite of programs in that it has listeners who did not actively seek out a literary event. They just happened to turn on the radio. This is powerful in helping us find new people to introduce to literature. Of course, it is impossible to quantify this opportunity. In any case, it is critical that each show be made with the intention of entertaining and drawing in a listener who would not self-identify as a booklover. Additionally, it is our only program that has a national audience, albeit very small. In terms of the quality of impact, *The Archive Project* could be characterized as wide but not necessarily deep, which complements some of our other work that has a deep impact on a relatively few individuals.

In terms of budget, *The Archive Project* is folded into Portland Arts & Lectures. Its primary expense is our producer’s time. In addition, there is the staff time (see above). There are not really any material costs. The Archive Project has virtually no marketing budget. In many ways, it is in and of itself a marketing tool for the organization and is deployed as such (e.g., in the lead up to the Portland Book Festival or Verselandia! we broadcast content from previous iterations of these

events). From an income perspective, we have recently begun to secure sponsors, including A to Z Wineworks and now Cole Haan. In the 2017–2018 season, the show will have contributed income of \$15,000.

Next Evolution

We do not anticipate significant changes to *The Archive Project* over the next three years. We will continue to keep the show focused on the writers themselves, in their own words, avoiding editorializing by the host (or too much personality, for that matter). The show will also continue to feature the content from Portland Arts & Lectures, Special Events, the Portland Book Festival, and our other programs such as Verselandia!

As with many of our small-budget projects, *The Archive Project* has no dedicated staff but is rather a small part of many people's jobs. For long-term sustainability, we should review staffing and decide whether this is the best structure or whether we should consolidate some of the roles. It is effective for fundraising and institutional development for the executive director to remain host.

In keeping with all our programs, we will continue to improve and polish the show in terms of production and content. With additional resources, the show would be able to record other events in the community and create more of our own content. This would require the hiring of a content producer who could spend the time developing show concepts and pulling together the partners or people to make them happen.

While we have a very limited role in deciding our time slot on OPB's traditional broadcast and in growing those listener numbers, we do have agency over the online life of the show. To that end, we should seek resources to grow the number of listeners on the website and the podcast. If we can grow the gross listenership online nationally, we will grow the brand of Literary Arts outside Oregon (a key to attracting new resources to the whole organization) and be able to attract more substantial sponsorships from national entities.

SUMMARY OF THE ARCHIVE PROJECT GOALS

Continue to polish and improve production and content of the show.

Reevaluate staffing to improve workflow and content.

Add resources for marketing and staff time to increase online listenership.

Add resources for content producer to create new shows from scratch.

Increase online listenership by 20% over three years.

DEVELOPMENT AND MARKETING

Landscape

The goal for Development and Marketing is to highlight the work done by the programs of this organization so that the public recognizes Literary Arts' impact and appreciates that we are a key contributor to the cultural community and worthy of significant financial support. Progress has been made since the prior assessment in 2013, but much work remains.

CONTRIBUTED INCOME

Let us begin with two statistics from the most recent *Giving USA 2017: The Annual Report on Philanthropy for the Year 2016*, a publication of Giving USA Foundation, 2017, researched and written by the Indiana University Lilly Family School of Philanthropy:

“Giving to arts, culture, and humanities is estimated to have increased 6.4 percent (5.1 percent adjusted for inflation) to \$18.21 billion.”

“[In 2016,] giving by individuals grew at a higher rate than the other sources of giving, outpacing giving by foundations and by corporations.”

According to the [Marts & Lundy with Lilly Family School of The Philanthropy Outlook 2017 & 2018](#), “Giving by American individuals/households is predicted to increase by 3.0% in 2017 and by 3.2% in 2018.”

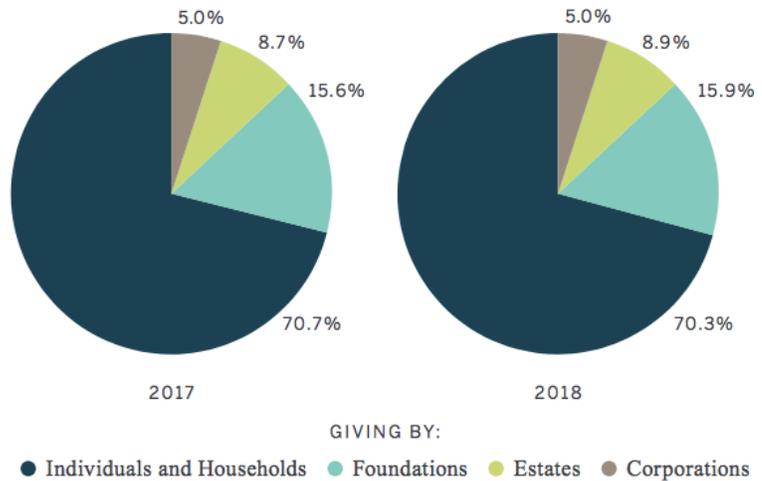
The takeaways are encouraging for our sector (it is growing) and reinforce the thinking behind our strategic efforts to spend time and resources courting major gifts from individual funders. Additionally, further growth is anticipated, and we need to be poised to invite donors to make those gifts to Literary Arts.

The report continues: “While all sources of contributions are important to the philanthropic sector, more than 7 in every 10 philanthropic dollars that the sector receives is contributed by individuals/households; this donor type continues to hold real power in the donor-nonprofit relationship.”²⁷

27 <http://www.martsandlundy.com/2017/01/12/the-philanthropy-outlook-2017-2018/>

Figure 1
**DISTRIBUTION OF TOTAL GIVING,
 BY SOURCE, FOR THE YEARS
 2017 AND 2018**

Figure 1 shows the proportion of total giving by each source for the years 2017 and 2018. In 2017, 70.7% of total giving is expected to derive from individuals/households, followed by 15.6% from foundations, 8.7% from estates, and 5.0% from corporations. In 2018, the proportion of giving from individuals/households will decline slightly, while the proportion of giving from estates and foundations will rise slightly. The proportion of giving from corporations will remain steady between 2017 and 2018. All four components of giving are expected to grow in 2017 and 2018.



Source: *The Philanthropy Outlook 2017 & 2018*

As further proof that we should strengthen this point of focus on our relationships with individual funders, Harvard Business School case study 9-506-027 notes a crucial philanthropic trend that we should consider: “With the aging of the baby boomers, the largest intergenerational wealth transfer ever would occur by the middle of the twenty-first century. One study suggested that \$6 trillion would be donated to nonprofits through bequests from 1998–2052.” Literary Arts should be poised to receive these gifts through a robust planned-giving program.

Corporate giving is stable. Literary Arts enjoys a history of strong corporate sponsorship and has established a broad base of business supporters. We are grateful for their enthusiastic support. However, it must be stated that there is not enormous growth to be expected from this category. Portland has a small number of corporate headquarters for major national companies, and most new businesses opening locally are small and not prepared to give at a high level.

The national budget crisis and the uncertainties brought on by the current administration indicate that we should expect that government funding will remain stable at best and be decimated in the next budget cycle at worst. National government action will determine both the fate of the National Endowment for the Arts’ funding and the fate of the charitable giving deduction.

In response to the current funding environment and the trends as reported by thought-leaders in the sector, Literary Arts' priority will be developing strong major gifts and planned giving programs.

Earned Income and Marketing

According to the National Endowment for the Arts, "Over the past 15 years, consumers are spending more on admissions to performing arts events. As a share of total consumer spending, spending on tickets to performing arts events has doubled since 1998."²⁸

Portland offers a diverse selection of accessible and affordable live arts entertainment. Some local organizations with subscription-centered programming include the Portland Opera, the Profile Theatre, the Linus Pauling Memorial Lectures, the Mark O. Hatfield Lecture Series, the Oregon Symphony, the World Affairs Council of Oregon, Portland Center Stage, the Brain Awareness Lectures, the Third Rail Repertory Theatre, and Artists Repertory Theatre. Other players that offer ticketed lectures include City Club of Portland, Powell's, Voices Lecture Series, and National Geographic Live. There are many organizations competing for customer dollars and free time in Portland.

Some trends noted in the ticketing industry over the past five years include an increase in dynamic pricing (pricing based on demand, as used by the airline industry), and an increase in secondary ticket buying and selling (e.g., ticket brokers, online retailers such as StubHub, or "scalpers"). Despite these trends, Literary Arts continues to enjoy a very high subscription rate and has effectively sold out our series each year since 2014–2015, before the season's opener. We produce unique and well-curated content and insist on the subscription model for Portland Arts & Lectures. Given our current pattern of success, we will plan to continue in this vein for the immediate future for our series. It should be noted that there is a potential audience development risk if we stick too rigidly to this strategy without creating opportunities for new audience.

As of fall 2017, Portland's (owner of local venues such as the Arlene Schnitzer Concert Hall, Keller Auditorium, and Newmark Theatre) renewed its contract with the ticketing system New Era into 2020. The overall consensus is that the customer

28 https://www.arts.gov/sites/default/files/NEAartsandeeconomy_April2017_FINAL.pdf

service experience has improved for ticket buyers since Portland’s broke from their contract with Ticketmaster in 2012.

In Portland, we have an array of outlets for marketing dollars, including local print, radio, and online channels. Despite the decline in readership among our local papers, we continue to see benefits in partnering with and advertising in several papers, including alternative weeklies and *The Oregonian*, which has reduced its publishing rate to four issues per week. *The Oregonian* continues to have the highest circulation for a local paper, with more than 170,000 subscribers, and their audience demographics are similar to a large portion of our ticket buyers.

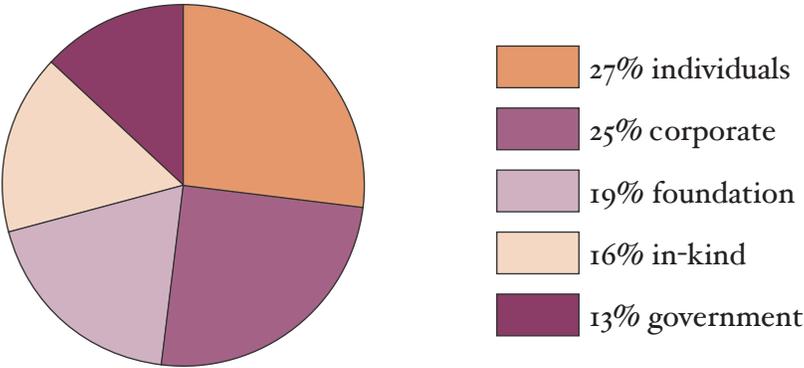
By creating rich content for the radio, online, and social media, Oregon Public Broadcasting continues to be a powerhouse in our community. We will continue to partner closely with all of these organizations and utilize new media partnerships that include sponsored content, such as email and social media, to blend a mix of editorial and advertising to meet their audience in new and authentic ways. Traditional online advertising is not always cost-effective. We do not have the resources to book and manage our own online ad buys. We should continue to elevate our existing media partnerships to leverage new communication channels to reach new and existing audiences where they are.

Current Platform

According to every metric—people served, budget size, quantity of partnerships, and number of sponsors—the organization is twice the size it was five years ago. Below follows a discussion of the current platform in terms of our two revenue categories: contributed (58% of budget) and earned (42% of budget).

In order to help Literary Arts thrive financially at our new organizational size, our efforts toward generating contributed income will need to become more sophisticated and modern. In addition, we will need to maintain our current level of support from subscribers and single-ticket buyers so that our earned income stream remains a healthy source of revenue.

Literary Arts is diversified in our contributed income sources.
For the FY 2017–2018 budget:



Although it is a strength of the organization that we are not overly dependent on one channel for contributed income, industry standards and best practices in fundraising as cited above indicate that Literary Arts’ focus on increasing individual giving should continue to be our highest priority.

Since the writing of the prior plan, we have acquired a book festival. The annual production of the Portland Book Festival continues to require significant investment in creative energy, time, and team effort as we work to stabilize the festival as an ongoing program of Literary Arts.

Development and Marketing currently comprises the following employees:

- 1 FTE director
- 1 FTE communications manager
- 1 FTE development manager
- 1 FTE ticketing and data specialist
- 1 FTE donor relations assistant
- 0.375–0.45 FTE grant specialist
- 0.375–0.5 FTE marketing specialist

This structure has been in place since August 2016.

Contributed Income

There are four sources of revenue in this category. We receive support from the following sources:

Individuals and families who make cash or stock gifts to Literary Arts in response to a direct appeal that can be made verbally in person (major gifts ask or at a fundraising event), in print (via marketing materials or a traditional solicitation letter), or online

Corporations who make cash gifts to support various initiatives, programs, or events of the organization and expect recognition benefits (ticketing and marketing) that are agreed on by contract

Foundations accessed through a formal grant writing process, though sometimes individuals and families may make a personal gift (no formal process) through a family foundation in response to a direct and personal request for support

Government (federal, such as the NEA; state, such as the Oregon Arts Commission and Oregon Children's Theatre; and regional, such as the RACC and municipal Multnomah County Cultural Coalition) funds accessed through a formal grant writing process

In the fall of 2017, we executed a new type of fundraising event for the organization. Instead of holding three programmatic fundraisers over the course of the year, as had been recent organizational practice, we held one event to generate general operating income. Financial results from this event were strong. We exceeded budget goals and were able to raise \$347,000 with expenses of \$76,000 for a net of \$280,000. Attendance was 400 people. We had 100% board participation, and the fundraising activities of the new Development Council of the organization made this success possible.

We are now budgeting for substantial support in the area of major gifts. Theoretically, the consolidation of three fundraisers into one will create staffing efficiency and provide the opportunity to spend more time in one-on-one meetings with donors rather than limiting fundraising activities to event table sales and management or planning. In addition to working with a major gifts consultant for

assistance in troubleshooting and setting strategy, the executive director and the director of Development and Marketing meet and review relationship reports and call lists on a consistent and regular basis to be sure that we are organized in our donor stewardship efforts and are “asking” at the right time.

The budget goals for our regular campaigns (fall letter and subscription renewals) remain largely the same, which means that we must also achieve growth in giving at the smaller contribution levels in order to hit our annual targets.

The Literary Arts Board of Directors is an increasingly important source of financial support; in 2016–2017, the average board gift was \$3,520, up from \$2,474 in 2012–2013 (prior to the Brian Booth Writers’ Fund campaign). To prepare for the future and reflect current levels of giving, we will need to revise our language around board personal cash-giving targets during recruitment to be “between \$3,500 and \$5,000” instead of the \$2,500 that we have been stating as the board giving average.

Additionally, the board gives more than \$60,000 annually in-kind (primarily marketing and wine) and leverages another \$60,000–\$80,000 in corporate support.

Earned Income/Marketing

The earned income revenue stream is comprised of selling subscriptions and single tickets to events (largely managed by Development and Marketing, 81% of total budgeted revenue), and also registration fees for festival booths, seminars, and workshops (largely managed by program managers and directors with marketing support from Development and Marketing, 19% of total budgeted revenue).

As mentioned above in “Landscape,” we continue to put our resources into selling subscriptions rather than single tickets to Portland Arts & Lectures. Our marketing plans encourage subscriber retention and subscriber acquisition. Early renewal pushes that include incentives to encourage audience members to “renew now” are the focus of organizational messaging at lecture events at the end of the season. Because the above strategy limits Portland Arts & Lectures audience development efforts, we now intentionally hold back ticketing for each Portland Arts & Lectures event devoted to adult outreach to new communities. Special Events, the Portland Book Festival, and the events happening in small scale in our storefront space also provide opportunities to engage new people.

Literary Arts continues to manage all of its subscriptions in-house to provide quality customer service and outsources most of our ticketing workload for the Portland Book Festival and Special Events to the box offices of the Portland Art Museum and Portland's, respectively. For Special Events, Literary Arts has a portal into the ticketing system of New Era and can act as a secondary seller, thereby continuing to provide responsive customer service to its sponsors and VIPs.

In order to build our reputation and organizational recognition, we should plan to continue spending our budget on marketing, even if our events are selling out without media buys. For example, if fewer public sales campaigns are dedicated to attracting Portland Arts & Lectures subscribers, then we should be cautious not to save those dollars. If taken to the extreme, limited media spending could cause us to be less visible in the community.

With more Literary Arts events, classes, and seminars than ever, we need to invest in more comprehensive and efficient marketing strategies. By creating integrated marketing campaigns that combine traditional advertising with community outreach, internal communications, and social media, our audiences will experience the mission of Literary Arts more organically rather than being served with a uniform hard sell. Traditionally, our marketing material has been somewhat disjointed and lacking a brand identity and strong voice. We should strive to be more consistent in the materials and communications we distribute to the public.

The Oregonian continues to be a great resource for ticket sales. We see a direct relationship between ticket sales and the placement of an ad in *The Oregonian*. We do not see the same level of response when we place ads in other local papers. Generally speaking, our lecture audience is more likely to be reading *The Oregonian*, due to their average age and stage of life, than alternative weeklies.

OPB is our strongest media partner, from cooperative programming on *Think Out Loud* to ticketing deals for membership drives (The Moth) to advertising support for Special Events. We have expanded our network of connections across the city to the various publications including *Willamette Week* and *Portland Monthly* so that we are well positioned for the future, but as a top priority it makes sense to invest our dollars most heavily in *The Oregonian* and OPB. We are also using social media and online outlets more strategically to connect with influencers (artists and

writers) to help us engage more fully with the local writing community and attract new audiences.

Promotional partnerships with other community organizations continue to be a great (and free!) resource. Creating and sharing media kits and planning cross-promotions with our partners is a cost-effective way to promote our events and programs to related audiences (we have seen this during the Portland Book Festival and Everybody Reads). Utilizing these partnerships to cultivate borrowed and traded email lists continues to reach known ticket buyers directly and represent one targeted way to reach new potential audiences.

With a growing database of more than 34,000 people in our email application, we can begin to tailor communication to sell targeted offerings to select groups. For example, memoir-writing students may be interested in a Delve seminar focused on famous memoirists. This requires time and resources to find connections, but it would create deeper connections with the audiences we serve.

Social media is playing an increasingly important role in communicating with our audience. We have continued to experiment with advertising on Facebook, Twitter, and Google Ads. By adding social media to marketing plans for each event and program, we are reaching people through a variety of avenues, making them more aware of the Literary Arts brand and mission.

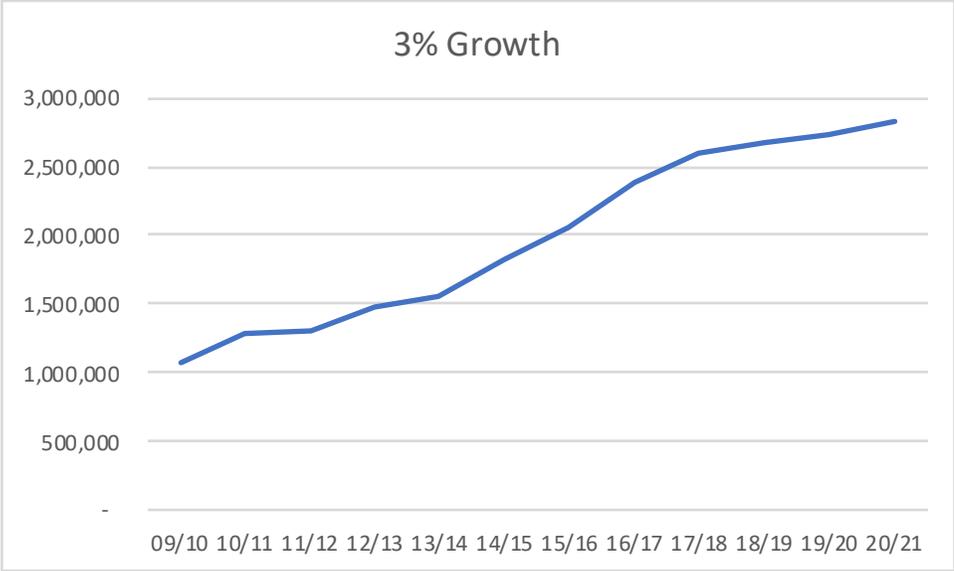
Literary Arts currently uses FileMaker Pro as its customer relationship management (CRM) and ticketing system. A search for a new CRM was conducted in 2012–2013, and the findings revealed that Literary Arts' overall needs outpaced what could be provided on most cloud-based systems designed for small organizations. At the same time, our budget was not robust enough to support a drastic systems upgrade (Blackbaud, Tessitura), the likes of which are used by heavy hitters such as the Portland Art Museum and Oregon Symphony.

Our current ticketing system is at capacity; if programs that require heavy ticketing services are added to the Literary Arts portfolio, we will have to rethink staffing and infrastructure to accommodate the new work.

Next Evolution

What the Program Will Look Like in Three Years

DEVELOPMENT AND MARKETING 2018-2021 DESCRIPTION



The work and vision for Development and Marketing is defined to a large extent by the volume and type of programming that is the work of Literary Arts.

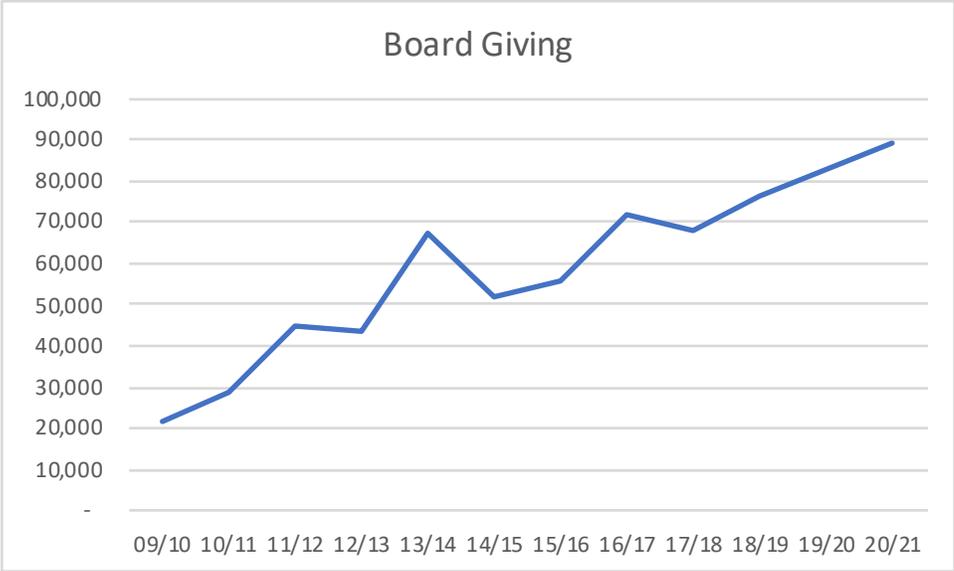
What will our organizational size become over the next three years? Will we continue to expand at our current rate, and if so, in what direction will we expand most dramatically (large-scale presenting, fee-based programming, community programs that need significant contributed income)? Or will there be some sort of leveling off? The answers to these questions will determine the staffing needs for the Development and Marketing team and give shape to the kind of work we will need to do.

At a conservative growth scenario of 3% per year, the organization’s budget will climb to over \$2.8 million by 2021. If that is the case, then we will certainly need:

i. Contributed Income

An established annual organizational fundraiser that yields approximately \$500,000. Additionally, we will need to be laying groundwork and doing the early strategy work to allow for a transition in the 2021–2023 period to a major event refresh and/or new format.

Active board involvement in fundraising, with personal cash investments in the range of \$3,500–\$5,000 annually (plus leveraging in-kind and corporate support where applicable).



Robust leadership circle support (annual giving of more than \$2,500).

A major gifts program that invites our closest supporters to support various projects (more than \$5,000) each year with “special” gifts that go above and beyond annual giving levels.

To steward a larger circle of Annual Fund donors. In 2009–2010, we had about 200 gifts at \$100, \$250, \$500, and \$1,000. By 2016–2017, that number climbed to nearly 500. In the next three years, if we continue at a same rate of growth, we will need to engage with more than 650 donors annually.

A planned giving program that publicly recognizes donors who have left a gift to Literary Arts in their will, creates community for that group, and invites new investors in our future.

Reliable corporate support, such as fully funded Portland Book Festival stages, Portland Arts & Lectures sponsors and underwriters, and Special Events and community program sponsors. We will need to increase the sponsorship levels over time without alienating existing funders and establish a “new normal” of increased sponsorship levels, which is a psychological change for our community of funders.

Reliable foundation and government support. We will need to continue to engage existing supporters, recruit new ones (particularly family foundations and donor-advised fund holders), and build regular capacity-building grants cycles into our process to allow us to apply to major supporters who will not support annual programs or general operations.

Also, we should plan to increase staff as needed to accommodate any special projects that may emerge, including:

Le Guin House.

Finish the Brian Booth Writers’ Fund Campaign (should we get a lead gift as a tool to help to close with \$2 million)

2. Earned Income

Opportunity for earned income will largely be driven by programming choices. Unless the balance of programming activities changes dramatically in the next three years, Development and Marketing should expect to accomplish the following goals:

Spend 35% of total team time on supporting ticketed events (public programming including the Portland Book Festival).

Position Portland Arts & Lectures as a “sell-out” series and maintain a renewal rate over 70%. Tools we use include excellent customer service and responsiveness, personal attention, brand loyalty, and the creation of feelings of urgency around renewal.

Hit goals for Special Events ticket sales with appeals to our core audience and by utilizing the fan base of the Special Events lecturer to bring new audiences to our lectures. This strategy applies to the Portland Book Festival as well: As the festival becomes a reliable fixture on the cultural calendar, we should be able to use authors who will appear as draws for new participation.

Invite community participation from the constituency served at our community-based public programs: Oregon Book Awards and Verselandia!

Continue to invest increased time and promotional support for writing classes and Delves as those programs grow and evolve.

Create a sense of “brand” for the activities that happen in our space and promote them by campaign.

Maintain and grow existing promotional and marketing partnerships with OPB, *The Oregonian*, and *Willamette Week*. Also, effectively utilize cultural partners in outreach (Portland Art Museum, the Oregon Historical Society, Portland’5, etc.).

Free programs could benefit from significant marketing investment in the following ways:

Expand marketing support for *The Archive Project* and build that program into a nationally recognized asset. How do we invite listeners to engage in person?

Begin supporting the small-scale presenting that happens in the Literary Arts space. These events now draw an audience of over 1,300 annually. Who are these attendees? What are they learning about Literary Arts? How are they invited to do more?

3. Brand

Development and Marketing, with the engagement of the full staff, will also need to address organizational identity (brand). Are we clearly presenting to Portland, to Oregon, and to the national literary community the value of Literary Arts?

Are we welcoming to all sorts of people from a variety of backgrounds? Are we able

to execute a wide variety of programs and still communicate through all aspects of Literary Arts a core mission, set of values, and standard of excellence?

The following brand projects are ripe for deep investigation:

Literary Arts, the organization's name and program names. Does our name reflect the organization as it is and as we want it to be? Do we have a well-established organizational "voice"? Are we able to articulate specifics around voice so that many people can write for us and speak for us? Do we leave a cohesive impression?

Website. We have already embarked on discovery to begin creating a process to build a website to better serve the constituency we have and the areas of growth.

Space. What does our literary center look like, and do we have the space to fill the community demand for programming?

GOALS THAT CORRESPOND TO THE VISION STATEMENT

Literary Arts is a national leader in empowering our citizens to tell their story and in making reading, writing, spoken word, storytelling, and all forms of literature central to civic life. Through our national and local collaborations, we are the most influential literary center in the Pacific Northwest, and our constituents reflect our diverse society. Above all, we build community around the power of reading and writing: a community that is intergenerational, inclusive, and engaged with the most pressing issues of our time.

SUMMARY OF DEVELOPMENT AND MARKETING GOALS

Note: These goals will need to be refined as we see what emerges from programming and as we discuss in more depth how far we want to formally promise that we will go on with brand analysis.

Income: Contributed and Earned

Fund the organization annually (“in the black” per the audit).

Fuel organizational growth primarily by increased individual donations.

Brand:

Perform a brand assessment, a written exploration of Literary Arts’ brand profile and voice, with the following possible timeline:

2018–2019: Pick an external team who will lead this work.

2019–2020: Engage our constituency in the review.

2020–2021: Report findings to the board.

DIVERSITY, EQUITY, AND INCLUSION

Landscape

In the early years of racial and social justice, most institutional initiatives focused solely on diversity, or the hiring of nonwhite employees. While diversifying staff, students, or audiences is a worthwhile and desirable goal, it has become clear that simply assimilating people of color (PoC) into existing, flawed institutions is not enough. Once PoC arrive, do they feel welcomed and supported? If not, are resources made available to them to address the issue? To answer these questions, the work has expanded beyond just diversity to encompass equity and inclusion as well.

Across industries and the nation, the phrase “diversity, equity, and inclusion” (DE&I) is becoming more and more prevalent. How do we define these terms, and what distinguishes these goals from one another? As mentioned earlier, diversity is the presence of difference or variety within a given setting. Inclusion aims to help people with historically marginalized, oppressed, and underrepresented identities feel valued, supported, and welcomed within that setting. Equity is the approach used to facilitate both diversity and inclusion. General Assembly states that “equity recognizes that advantages and barriers exist, and that, as a result, we all don’t all start from the same place. Equity is a process that begins by acknowledging that unequal starting place and continues to correct and address the imbalance.”²⁹ As we move forward in this work, it is important to remain clear in our definitions of these terms, as well as how and when they are applied.

On a local level, Portland’s racial history is a fraught one. From its conception as a white supremacist community to its current inequities, Portland has not always been friendly to its nonwhite residents. In the last decade, Portland’s national reputation has shifted from that of a relatively small, out-of-the-way logging and shipping hub to that of an up-and-coming metropolitan destination. As the number of people relocating to Portland increases, the city’s demographics have been steadily shifting. As the city diversifies, Portlanders, both new and native, have to contend with the city’s white supremacist history and its legacy in the present day.

29 <https://generalassemb.ly/blog/diversity-inclusion-equity-differences-in-meaning/>

Even as Portland’s demographics shift, long-standing black communities are being pushed toward and beyond the margins of the city as housing prices soar and local businesses are shuttered. Recent data shows that most of the nonwhite transplants in Portland are of Asian descent, with smaller numbers of Latinx and black newcomers.³⁰ Moving forward, we must be specific about which communities we aim to reach with what programming. We should be careful to be as specific as possible rather than lumping all nonwhite constituents into an umbrella “PoC” category, when, for example, we mean to serve the black, Latinx, East Asian, or South Asian community specifically.

Many new residents of color are artistically inclined, either as creators themselves or as consumers and patrons. This is evident in the variety of arts programming centered on or around PoC in the city. Though perhaps less visible than other series in town, new programming created by and for creatives of color is growing. Literature in particular is thriving, with several up-and-coming series. [De-Canon: A Visibility Project](#) is a “pop-up library” and web resource project that showcases literary art by writers and artists of color, with the goal to put forth an alternative literary “canon.” The [Whitenoise Project](#) is a reading and discussion series centering writers of color and underrepresented voices in Portland. [Tender Table](#) is a monthly storytelling series featuring femmes of color and nonbinary PoC and their stories about food, family, and identity. [Milagro Theatre](#) promotes Latino theater, culture, and arts education experiences for the enrichment of all communities. More generally, there is the loose coalition of [Arts Workers for Equity](#), whose goal is to provide space and resources to advance the conversation about DE&I in the arts and take action to create tangible change in the arts community.

Additionally, there are several other culturally specific, social justice, and community-oriented organizations in the city, including the Immigrant and Refugee Community Organization, Latino Network, Muslim Educational Trust, and the Asian Pacific American Network of Oregon, just to name a few. At a macro level, government and quasi-government entities such as the [Regional Arts & Culture Council](#), [Portland Public Schools](#), and [Multnomah County](#) have all made public commitments and progress toward DE&I work. It is clear that though [Portland](#) may seem deeply homogenous in both its demographics and arts

30 http://www.oregonlive.com/data/2017/06/asians_fastest_growing.html

programming, many nonwhite communities are not only eager to engage with the arts but also already doing so on their own terms. Moving forward, our goals in the coming years should not be to presume to simply gift our services to these communities, but rather to complement, highlight, and uplift the work they are already doing, to meet them where they are.

Current Platform

As it stands, Literary Arts has no publicly available organizational commitment to DE&I. Though Literary Arts has created an equity lens and framework, awareness of these tools within the organization and their usage varies. The organization has made some progress in terms of making programs more equitable. Examples of this work include creating an Oregon Literary Fellowship specifically and explicitly for emerging writers of color, programming author lineups and teaching rosters that are reflective of Portland's demographics (see Portland Book Festival and Youth Programs sections of this assessment), and investing in workshops and @LiteraryArts partner events that highlight marginalized voices in literature (see Oregon Book Awards & Fellowships and Delve Readers Seminars sections of this assessment). Additionally, every meeting of the Literary Arts Board of Directors features at least a 15-minute conversation on the subject of DE&I. While it is clear each program has developed its own goals and measurements for DE&I, these goals are not always shared with those outside of program staff. Although an all-staff DE&I training was held in 2015, there have since been several changes and additions to staff and to programs. In the future, to keep staff informed about DE&I goals and progress internally, and issues of inequality generally, these trainings should be held more regularly.

The specific DE&I goals, strategies, and successes for each program can be found in the individual program sections of this strategic plan. Generally, we are focusing on one or more of the following goals:

Creating programming that appeals across cultures and is reflective of Portland's (and Oregon's) demographics, and that gives a platform to underrepresented voices

Creating equitable opportunities for artists from underrepresented

backgrounds to facilitate the creation or sharing of work (e.g., culturally specific readings in our space and writing fellowships created for writers of color)

Finding solutions to increase accessibility of programs

The goal of this section is not to replace, reengineer, or review these goals. Rather, the goal is to provide a broader assessment of how these goals are and can be supported across and throughout the organization. The bulk of our work in the coming years should focus on better integrating our DE&I values into the infrastructure of the organization, such that existing goals are supported and any progress can be sustained.

Many of our greatest sources of foundation and governmental funding require demographic information to ensure that the organizations they support are providing equitable access to their programs. Currently, Literary Arts supplies these numbers from a mix of self-reported survey data and data collected from The Results Group for the Arts (TRG Arts) Data Center, with the latter supplying the majority of our demographics needs. Using home ownership and other public records, TRG Arts makes a calculated estimation of demographic information for a given list of patrons, donors, or event attendees. Long term, this presents a number of issues for the organization. Since TRG Arts relies mainly on home ownership, results are skewed toward those who can afford to own homes (i.e., those who are typically white, middle to upper class, and over 30). As a result, it is incredibly likely that many individuals who engage with our programming are not being counted and therefore may not feel heard, represented, or even welcome at our events. Additionally, it is problematic to make assumptions—even calculated ones—about the race or ethnicity of individuals based on names and addresses that are typically (but not inherently) associated with a group of people. In the future, Literary Arts must look toward strengthening existing surveys and implementing ethical and transparent means of collection to increase response rates.

Internally, the current goals for the organization are less clear. The organization is committed to equity within the hiring process and provides professional support for any staff member by having an equity professional on retainer. However, we need written guidelines for supporting staff of color once they are hired. Informal mentorships for new staff of color have been piloted by select directors, but no

formal, organizational practice exists.

The Board of Directors, a significant resource in terms of community representation, still remains largely white. The board also provides sizable financial support to the organization through personal giving and the donations they are able to leverage from within their organizations and communities. Board members are expected to give between \$3,000 and \$5,000 annually, provide possible in-kind services, and attend six board meetings a year. All of these expectations can create barriers to prospective board members with low income but otherwise high value, and the culture of board service can generally feel exclusive to nonwhite potential members.

Efforts are currently being made to diversify the board and to make board service more inclusive and equitable. To combat stagnation on these issues, the board engages in DE&I discussions for at least 15 minutes at every board meeting. There is still work to be done in terms of reducing financial barriers, but a recent decision in FY 2018–2019 to increase the maximum capacity of the board from 20 to 25 members will create a safety net of board members who can give at higher levels and allow prospective board members with lower income to give in other ways. Additionally, there is an active interest in and effort to recruit nonwhite members to the board and to the organization as a whole.³¹

The board also has a small DE&I task force (comprising seven board members and formed in 2016), whose main focus is presenting a variety of academic and literary DE&I resources to their peers for discussion. They also help coordinate any DE&I workshops done with the board. In the coming years, it will be crucial to expand the role of this task force to more closely resemble existing advisory councils, including the addition of self-selected staff and community stakeholders.

Arts Workers for Equity (AWE), mentioned earlier, has recently piloted a Racial Equity in the Arts Self-Assessment Learning Circle, the goal of which is “to support Greater Portland-area nonprofit arts and culture organizations in advancing

31 This is a complex issue, as some funders demand that a board be both an important financial engine and diverse without always acknowledging the history of economic disenfranchisement of people of color. This issue is also complicated by the need for board members to be active fundraisers with their peers, which adds pressure to those who cannot give in cash. We note this here, as it is an issue with structural biases built into it.

racial diversity, equity, and inclusion in their programs and operations through self-assessment processes.”³² This program is volunteer-based and participant-driven. The end goal is not only to produce a rough racial equity action plan for each participating organization but also to create a network of support for arts organizations committed to increasing racial equity in Portland. Currently, two members of the Literary Arts staff are working with the AWE Learning Circle to assess how the organization anticipates and handles issues of DE&I; create an action plan in response to this assessment; and share with the rest of the organization what they have determined. To conduct the assessment, AWE leadership provided the Learning Circle with the Tool for Organizational Self-Assessment developed by the Coalition of Communities of Color. The assessment portion has been carried out by a small group of staff from across the organization who have expressed interest in the work. As a result of this self-assessment, the AWE working group has come up with a handful of action items and goals to be implemented on a monthly or yearly timeline, respectively.

Next Evolution

As the organization grows and becomes more visible (both locally and nationally), we must be sure to keep DE&I at the forefront of our planning. Based on the AWE self-assessment conducted in the fall and winter, the working group has identified the following topline issues on which Literary Arts should focus:

DATA COLLECTION

Before the organization can begin addressing issues of inequity, we must first know whom we serve and who makes up our staff (paid and volunteer). Current survey methods are ineffective; surveys are typically sent electronically immediately following an event and have low response rates. Moving forward, the organization will have to reevaluate how and when people are surveyed. Standard best practices for data collection include collecting data early and often, exclusively using self-reported data, and fostering open communication about why the information is being solicited.

32 <http://awepdx.tumblr.com/learningcircle>

Steps have already been taken to revise and consolidate the surveys used across the organization. These newly revised surveys have already been disseminated to all staff, board members, contractors, and volunteers of the organization. The response rate overall was about 35%. If volunteers are excluded, the response rate jumps to 72%, demonstrating the need to catch volunteers at a more opportune moment (i.e., when they are all present and focused on the task at hand). Additionally, the AWE working group is working closely with ticketing and programs to create and implement more effective data collection strategies in 2018–2019. Some of these strategies include

- surveying our Portland Arts & Lectures audience at the first lecture of the season;

- surveying contractors (WITS writers, Delve Guides, and writing class instructors) and volunteers at their first informational meeting of the season;

- creating a script for volunteers to refer to when surveying constituents;

- potentially building surveys into author acceptances and/or contracts (though many writers of color address race and other identities in their work, it is important to be consistent in surveying everyone who come into contact with the organization);

- ascertaining the best medium for collection at a given event (e.g., paper surveys vs. an online form accessed via iPad); and

- partnering with local businesses to offer incentives to take the survey.

DE&I ADVISORY COUNCIL

Another crucial step will be to combine (or at least facilitate conversation between) the AWE working group and the board's DE&I task force. These groups have distinct experiences within the organization and the larger community, and we should not silo the valuable and productive conversations happening within each. Eventually, this internal council will need to move toward becoming a more public advisory council, along the lines of the existing program advisory councils. Keeping in mind that these topics are sensitive and that we must balance transparency with

tact, this transition to a public council likely would not take place for at least a year or two once the two groups form a single entity.

PUBLIC COMMITMENT

It is also of utmost importance to make our commitment to DE&I public. While this may feel sudden and even a little scary, we must acknowledge that we cannot adequately hold ourselves accountable on our own. Organizations like Artist Trust have already begun publicly documenting their equity work via their website.³³ For Literary Arts, the first step would be to set up a dedicated web page through which our equity framework, goals, successes, and this assessment are made available. This web page might also act as a kind of online forum through which our constituents and partners can submit feedback

This digital commitment should be echoed in our physical space as well, through the creation of signage that not only makes our commitment and existing equity work known but also provides those in our space with the information and resources they need to submit equity feedback to the organization.

We must also remember that our goal is not to simply gift our services to a population we don't usually serve, but rather to reengineer the system that excludes them in the first place. This work is exciting, but we cannot move forward until we begin to ask rather than assume. Authentic partnerships will require patience, thoughtfulness, and willingness to accept criticism. We can only know what people need when we ask them. Organic partnerships will begin to emerge when we give potential and existing partners the ability to both provide feedback and request the services that work best for them. We acknowledge that this work takes time and that these strategies will take time to implement. However, we must maintain momentum and be careful not to put the burden of change, of "speaking up," on the communities we hope to serve. Rather, we must create the opportunity for these dialogues ourselves.

33 <https://artisttrust.org/index.php/about/equity>

SUMMARY OF DE&I GOALS

Improve data collection. This includes assessing and reassessing when and how data is collected, as well as transparency around why.

Create a DE&I advisory council. This will be a multistep and multiyear project beginning with bridging the gap between the staff AWE working group and the board DE&I task force and ending with an advisory council comprising staff, board members, and community stakeholders.

Make our commitment to DE&I public via our website.

HUMAN RESOURCES

Landscape

Portland's population continues to rise quickly,³⁴ bringing more talented people to the area every day. With these new emigrants come new skills, outside perspective, and sometimes resources. A challenge is that these new arrivals do not have roots in our community, nor do they know the history of our organization, city, or state.

Competition for board members in Portland continues to be fierce. We are a small city with relatively few corporate head offices and philanthropists but many nonprofits. The biggest and most successful organizations have large boards (25 or more members), making it challenging for midsize organizations to recruit. In broad terms, the pace of life for working professionals has made it increasingly challenging to commit to volunteering. Despite the above, we remain very fortunate that there is a strong sense of social commitment among Oregonians.

The economy is reaching near full employment,³⁵ the housing prices in Portland (for both renters and buyers) have reached an all-time high,³⁶ and health insurance markets are unstable. This means that compensation and benefits are critical to retaining good talent. Creative jobs abound in Portland, so arts organizations are not the only place potential and current employees will search for work. All of this is a challenge in the nonprofit sector, since we exist in a low-resource environment and must contend with donor attitudes that frown upon strong compensation and benefits. In addition, shifting expectations about the workplace—amenities, flexibility, training, and autonomy—are also areas in which we must stay competitive.

In terms of equity, the arts organizations in Portland have made limited or very uneven progress in hiring people of color and/or serving communities of color. There are challenging structural issues that need to be overcome, including a limited pipeline of liberal and fine arts graduates of color, historic inequities that have segregated communities, the housing crisis that has displaced communities,

34 The city's yearly growth rate is 1.47%. In July 2017, Portland's population count was 639,863, a 56,000-person jump from 2010. <https://www.pdx.edu/prc/population-reports-estimates>.

35 https://www.bls.gov/cps/cps_htgm.htm

36 <https://www.huduser.gov/portal/publications/pdf/PortlandOR-comp-16.pdf>

and a sense among many newcomers that Portland is not welcoming to people of color and that there is a limited population in which they might find a community. These issues present challenges to businesses, governments, and nonprofits in building diverse workforces ready to work on a national or global stage. This will put Portland at a massive competitive disadvantage in the years to come with the population of the United States becoming majority nonwhite in 25 years or less.

Current Platform

Literary Arts engages a number of different types of people to do our work, including staff (both FTE and PTE), contractors, board members, council members, interns, and volunteers. An attached chart outlines the staff, board, and advisory councils.

BOARD OF DIRECTORS

The Literary Arts Board of Directors fluctuates between 20 and 25 members. The maximum number of directors as stated in the bylaws is 25. The board currently meets six times a year; the Executive Committee meets an additional six times a year. In FY 2016–2017, the average board member gift was \$3,520, rising 42% since 2013. If you factor in in-kind giving and leveraged corporate giving, the average board member gift in 2016–2017 was \$9,376, rising 61% since 2013.

In the last assessment, we indicated a need to develop a system for regularly involving board members in cultivation activities, particularly those directed toward individual donors. With the launch of the Development Council, the use of board participation plans, and participation in the annual fundraiser, every board member is engaged with fundraising.

In the last strategic plan assessment, we also suggested that the board, and the organization as a whole, strengthen their connections to members of the Patron section of the Portland Arts & Lectures audience, as well as the philanthropic community in general. Significant progress has been made on both these fronts.

An overall organizational weakness outlined in the last plan was that too many important connections rest in the hands of too few individuals. We have not only addressed this issue through a deeper board involvement in fundraising, but we

have also grown the Development and Marketing department significantly and have systematized many of our development functions. This has given our donor community more contacts within the organization.

As we continue to grow the board and replace board members whose terms are ending, we are looking for one or more of the following functions from new board members: social connector, business connector, community connector, unique area of professional expertise or experience, leadership potential, or connection to the writing community. This is in addition to a willingness to make a significant personal gift and participate in fundraising activities. In terms of fundraising, we have had a give target of \$2,500 for each board member, but this number will need to increase as the organization continues to grow. Additionally, we have a wide organizational focus on diversifying our staff and board.

STAFF

We currently employ 12 full-time staff, 6 part-time staff, and 2 seasonal employees. This is up from 7 full-time staff and 10.62 FTE employee in 2014. There has been steady and significant incremental growth since 2009. In FY 2014–2015, we acquired and relaunched the Portland Book Festival. This new program caused us to hire 1 FTE and 2 seasonal PTEs. To support this growth, and in response to environmental changes,³⁷ we have also added 2 FTEs and 2 PTEs to our Development and Marketing department. We also added organizational capacity by hiring a part-time staff member to lead the Delve program and a financial and HR manager. Additionally, Youth Programs reclassified 3 contractors to employees and now employs 3 part-time youth-program specialists.

The organization works with and engages over 80 writers, readers, teachers, and other professionals as contractors that provide valuable services to the organization.

VOLUNTEERS

Volunteer support has grown with the organization, and we have fulfilled a priority from the last planning process to more fully engage volunteers and establish consistent ways for volunteers to interact with the organization. Each program maintains a volunteer advisory council that provides program directors with a

37 The decline of institutional giving and a focus on individual giving.

deeper connection to the communities their programs serve and greater support in program development and execution. These councils have also provided the organization with a larger fundraising network. Since 2014, we have added the Development Council, Portland Book Festival Advisory Council, and Brian Booth Writers' Fund Endowment Campaign Task Force (which was disbanded when the primary campaign concluded). Combined with the Patron Advisory Council, Oregon Book Awards & Fellowships Advisory Council, and Youth Programs Advisory Council, these councils engage over 80 volunteers from the literary, philanthropic, and corporate communities.

We have also convened the Strunk & White Society (an honorary advisory body composed of former board chairs and others close to the organization) approximately once or twice a year in addition to engaging its members individually. This has proven to be powerful in terms of sustaining and building the organization's larger network, getting our message out, and fundraising.

In the past three years, the organization has substantially grown volunteer participation at the direct service level. Three years ago, the College Essay Mentoring Project was piloted. Today it is thriving and engages over 90 writers and community members. Additionally, the acquisition of the book festival has provided a great opportunity for the larger community to engage with our work and volunteer. Each year, the festival engages over 350 volunteers in just two days.

Over the past three years, we have continued to expand our use of interns, giving local students valuable experience and providing important support to staff. Three years ago, we indicated the need to create an annual fund for stipends so that students from all socioeconomic backgrounds have the opportunity to participate. We are now in a position to provide stipends and offer one paid internship.

Over the past three years, the organization has developed a Strategic Framework for Diversity, Equity, and Inclusion (DE&I), and we have strived to create more diversity across all activities having to do with recruiting, marshaling, and retaining our human resources. In addition to the Strategic Framework for DE&I, we have added an equity lens to our decision-making process. In our recruiting practices, we have begun to measure the diversity of candidate pools, with the aim of creating benchmarks for the future. In all three aspects of our human resources (board

members, staff, and volunteers), we have made significant progress in engaging diverse communities.

Next Evolution

Across all human resources platforms, we need to find ways to measure our DE&I progress, track our work, and support staff, board members, volunteers, contractors, and interns of color. We will create an organizational DE&I plan for the human resources of the organization. This plan will both guide us and provide clear benchmarks to measure our progress.

We will also create a systematized way for everyone who interacts with us (staff, board members, volunteers, contractors, interns, attendees, writers, etc.) to collect and report on demographic data. This is critical in our ability to measure our growth and success.

BOARD MEMBERS

In the next three years, we should consider increasing the board capacity to 30 members in order to balance all the demands that are made of board members — fundraising, community and artistic representation, governance, and fiduciary oversight. This will allow us to continue to fulfill the fundraising needs of the organization and provide a greater breadth of experience and expertise. We will continue to prioritize diversifying the board, including the leadership (Executive Committee) within the board.

The board may also wish to consider moving to quarterly meetings that are longer and allow for more in-depth conversation and presentations. Keeping board meetings focused at the highest level of oversight and strategy is important. Now that there are far more advisory councils than in the past, we could also look at reducing the number of board meetings but require all board members to sit on at least one council. This would keep board members off the sidelines and increase attachment while easing the commitment slightly of those board members who are highly involved.

STAFF

As we continue to grow, we need to evaluate the staffing impact on the administrative side of the organization. Over the past couple years, we have added significant capacity to the development team. This has allowed them to stay largely on pace with the growing budget and the fundraising demands that creates. We have not paid as close attention to the impact on the administrative side and the demands that places on HR and office support. Last year, we increased the role of the finance and HR manager from a 0.4 FTE to a 0.8 FTE, but over the course of the next three years, we should pay close attention to the strain on HR and office support and provide additional staff support when necessary.

We anticipate that competition to retain good talent will remain fierce; compensation, benefits, and work culture will continue to be critical. For this reason, over the next three years we will:

- implement a 401(k) matching program

- evaluate our compensation structure and ensure it remains competitive in a changing economy;

- run a comprehensive benefits evaluation and determine additional benefits we could offer that would be both cost-effective and desirable to employees;

- upgrade technology and software to provide staff greater flexibility in schedules; and

- create a mentorship program that matches interested staff with community leaders to further growth and development.

VOLUNTEERS

Over the next three years, we will work to systemize and bring together our volunteer programs across the organization. Right now, volunteers largely exist in specific programs and rarely stretch across the whole organization. There will be a coordinated effort to identify volunteer opportunities, share volunteer information, and ensure volunteers are invited into opportunities with other programs. To make this work easier, we will make improvements to the database that allow for better information flow.

We will be systemizing our internship program to ensure all interns, regardless of what program they are interning with, have a similar experience with the organization. In addition to their intern tasks, the interns will have the option to attend an all-staff, board, and/or a program's advisory council meeting; conduct an informational interview with a staff member; and/or receive specific skill-building training. We will also offer interns tickets and passes to attend any of our events that take place during their internship, as well as encouragement to participate in our Delve Readers Seminars or writing classes, as availability permits. We will also explore the potential for creating internship opportunities that span the whole organization, so an intern may learn about each program and develop a wide range of skills and experiences. We will also research and identify a grant or funding opportunity that allows us to pay interns a minimum wage. This will allow people from all socioeconomic backgrounds the opportunity to participate.

SUMMARY OF HUMAN RESOURCES GOALS

Create a diversity plan that allows the organization to track and measure DE&I work and support staff, interns, volunteers, writers, and contractors of color.

Create demographic collection guidelines that are effective, accurate, and culturally appropriate.

Evaluate increasing board capacity to 30 members and ensure the board remains at full capacity.

Evaluate current compensation and benefit plans and work environment in order to remain competitive. Implement necessary changes.

Explore potential grant or donor funding that will allow the organization to create and sustain a paid internship program.

Research the cost, benefit, and feasibility of creating a part-time volunteer coordinator position across the organization in order to facilitate the integration of volunteers across all programs.

BANKING AND FINANCE

Landscape

The US economy has recovered from the 2008–2009 recession and for the most part is stable and very healthy, with the US reaching full employment³⁸ and the stock market at record levels. Financial experts are cautioning that the market is due for a correction soon. In general, these corrections are normal and healthy. If the correction is gradual, it will have limited impact on our finances, but of course, if it is dramatic, then the impact will be greater.

Current Platform

Literary Arts is in exceptionally strong financial health. We have a strong cash balance that allows us to operate without cash flow issues and to maintain a healthy operating reserve fund. As of September 2017, the organization has board-directed reserve funds of \$988,946, or 40% of 2017–2018's total operating expenses. In addition, the organization has beneficial interest in eight endowment funds worth \$1,920,229, held by the Oregon Community Foundation. Two graphs illustrating the allocation of our net asset restrictions and assets over the past three years are below.

Over the past three years, the board approved the organization to use \$658,221 in reserves. Due to consistently producing surpluses, we have elected to take only \$89,196 of the approved funds. This has left our reserve funds largely intact. Having a strong reserve allows the organization to feel confident in growing both infrastructure and programmatic work. This included absorbing Wordstock (now the Portland Book Festival) and building out a new event space (both in 2015). Despite this, our reserves-to-operating ratio has gone down slightly from 0.5 in FY 2014–2015 to 0.44 in FY 2016–2017. This is due to the fact that the overall budget has grown 30% in the past three years without allocating additional funds to the board reserve fund.

The diversity of funding sources for the organization is a great strength, even as it requires a significant amount of human resources to maintain. A historical weakness for the organization has been that revenue generated by Portland Arts & Lectures and Special Event ticket sales has largely funded other organizational programs.

38 <https://www.bls.gov/eag/eag.or.htm>

This dependence has created a potential scenario of cascading failure, in which the financial success of one program is linked to another. The organization has made great progress in our efforts to correct this but has flatlined over the past couple of years. More needs to be done to continue to close the gap. Below is a chart outlining the organization's operating revenue over the past three years.

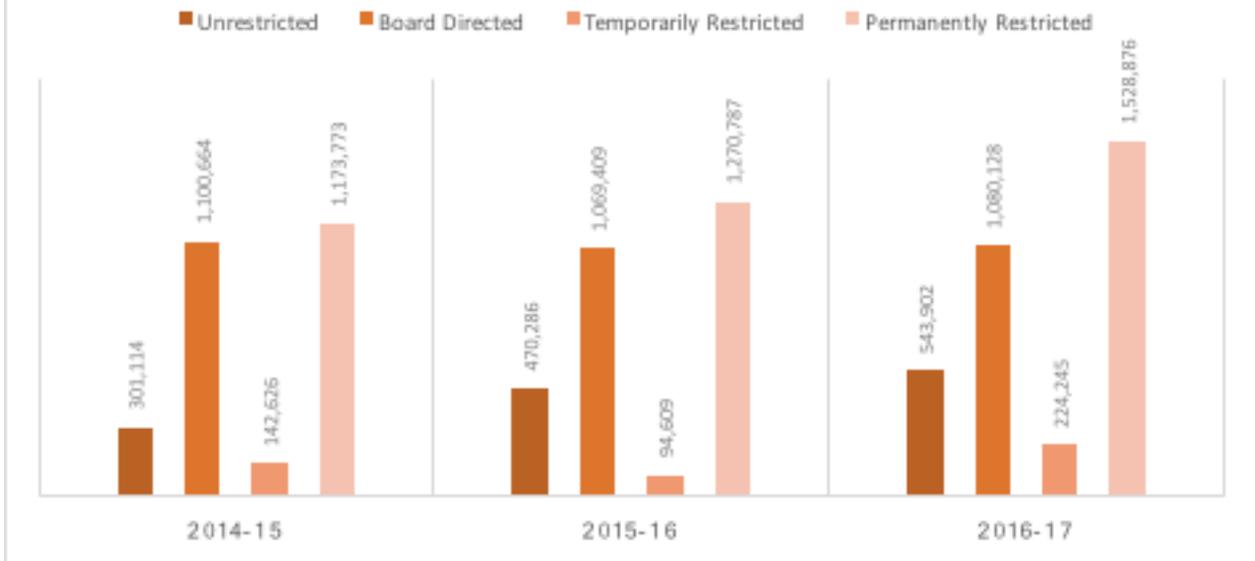
A breakdown of organizational expenses by each program, in addition to management and development expenses over the course of the past three years, is charted below. The organization continues to maintain low management and development expenses. In FY 2016–2017, management expenses were 12% of the operating revenues, and development expenses were 9%. Program service expenses, in contrast, were 79%.

In FY 2016–2017, we went through the process of changing banks. We initiated a request for proposal (RFP) process, with four banks submitting competitive RFPs. After a formal review of the RFPs and interviews with the top two banks, we settled on Bank of the West. They offered the organization a deeper banking relationship, a dedication to the organization's mission, potential financial support, in-house investment services, top-notch online services, and a deep discount on our merchant fees.

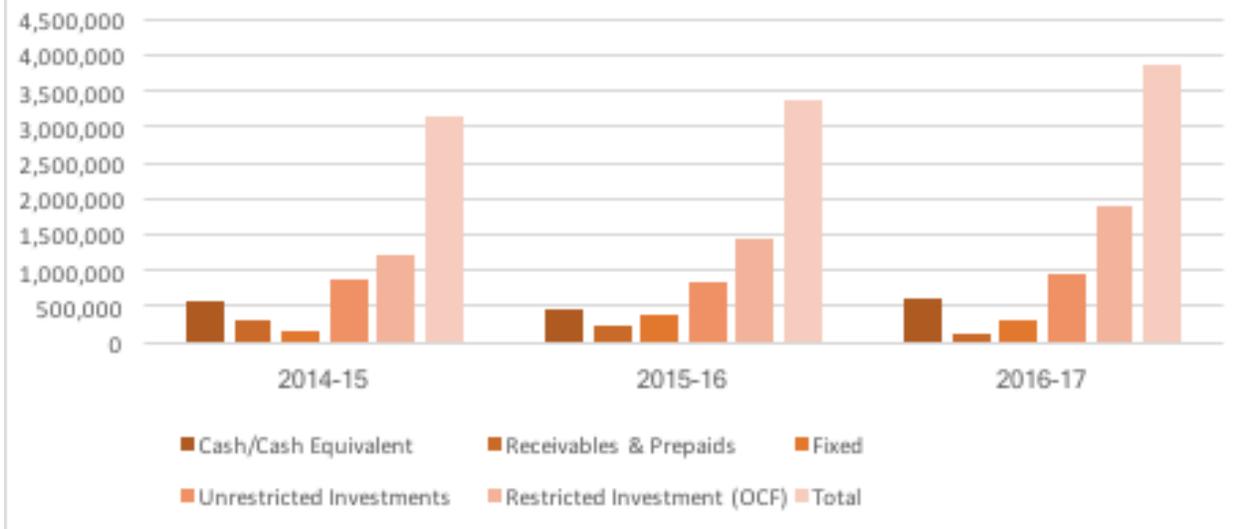
In 2015, we transferred our endowment funds to the Oregon Community Foundation. We made this move for four primary reasons: they have lower fees, they have the ability to manage complex gifts (insurance policies, donations of land, etc.), they provide a three-year trailing average that allows for a more even distribution, and their brand within the community provides donors with a deeper confidence in giving.

We currently maintain two checking accounts, an operating reserve money market, and a savings account (housing our mandatory state unemployment deposit) at Bank of the West. Our board-directed reserve funds are with Bank of the West's investment arm BancWest through seven different investment funds. We have a financial manager who works closely with our Board of Directors and Finance Committee to manage those investments.

NET ASSETS RESTRICTIONS

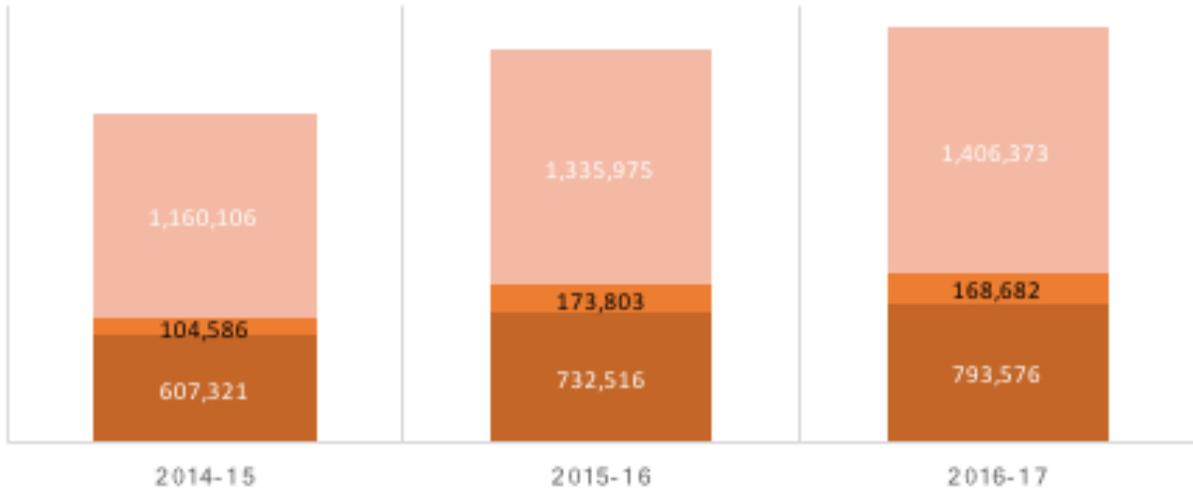


Assets



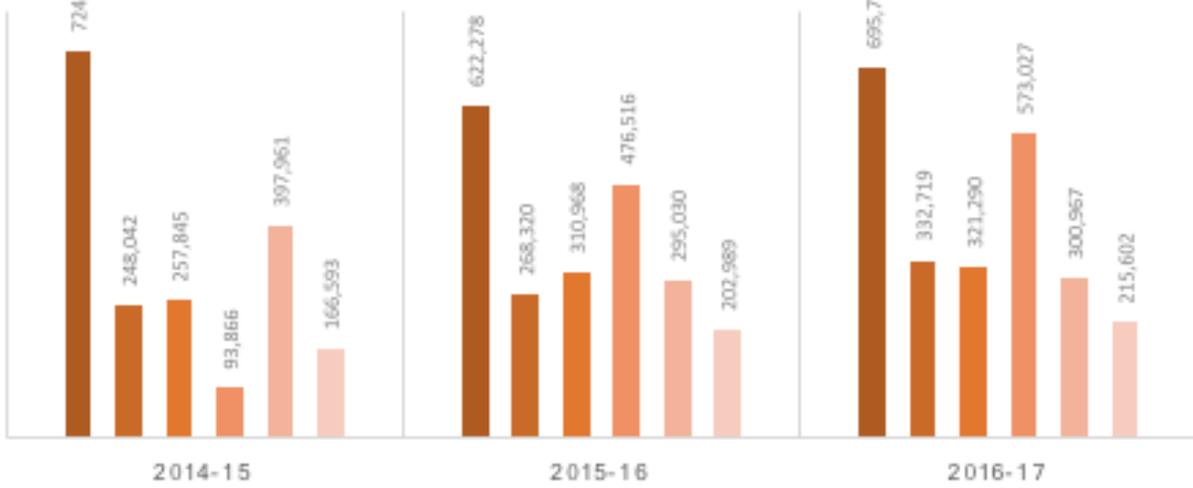
OPERATING REVENUE

■ Tickets
 ■ Program Service Fees
 ■ Contributions and Grants



EXPENSES

■ PA&L
 ■ YP
 ■ OBA&F
 ■ PBF
 ■ Management
 ■ Development



Next Evolution

As we move into the next three years, we are starting at a place of strong financial health. Over the past three years, we have made significant strides in improving the financial health and systems of the organization. Moving forward, our overall goal is to continue to build on the success of the past three years with an eye toward long-term stability for an organization that anticipates continued growth.

We will increase our board-directed reserves to allow us to sustain operations for six months, a target set by the Finance Committee. As the organizational budget grows each year, the amount in reserves will need to grow with it in order to maintain six months of reserves throughout the growth. It is also prudent for the organization to retain additional reserves for long-term projects as they may arise. This may include the creation of a general quasi endowment for Literary Arts (rather than being program specific, as all our endowments currently are). This would be an unrestricted fund that can be used for general operations and for larger projects. As our major gifts and planned giving programs continue to grow, we should consider this fund as a place for larger unrestricted gifts.

We will build an additional three-year plan that moves the organization toward increasing our financial independence from ticket revenue. The ratio of ticket sales to total revenue has become stagnant over the past couple of years. We will continue to make this a priority and build toward greater independence.

We currently maintain low management and development costs, something that is a priority of the funding community. We recognize, however, this is something the organization works to maintain, and we must continue this work. Over the course of the next three years, we will continue to ensure the ratio of management and development funds to total expenses remains low and will actively monitor and correct if necessary.

Currently, we enjoy excellent banking relationships. We will continue to evaluate these relationships to ensure they continue to meet our needs and remain cost-effective, but we do not anticipate making any further changes over the next three years.

We will evaluate our current office/event space situation and evaluate the feasibility

of it in the long run. With the organization growing and with skyrocketing rent increases in Portland, we need to determine what the best long-term situation for the organization is. If determined necessary, we will build a capital campaign to secure permanent housing for Literary Arts so that we are not subject to the skyrocketing rent and housing increases impacting Portland and allow the organization to grow (see Infrastructure section of this assessment).

SUMMARY OF BANKING AND FINANCE GOALS

Increase the board reserve fund by up to \$500,000 in order to reach six months of current operating expenses and to sustain that level through organizational growth over the next three years.

Create a general endowment for Literary Arts that is unrestricted for larger/ longer-term projects.

Reduce the percentage of ticket sales to 30% of overall revenue (it was 34% in 2016–2017). This will move the organization closer to eliminating programmatic dependence on Portland Arts & Lectures and Special Events.

Ensure management and development expenses combined do not exceed 25% of total budget.

Examine current office/event space and determine long-term feasibility both in relation to the growth of the organization and the skyrocketing rent increases (see Infrastructure section of this assessment).

Build the funds to sustain a 401(k) match that will top out at a 5% match in three years (see Human Resources section of this assessment).

INFRASTRUCTURE

Landscape

Portland is experiencing a housing crisis on many levels.³⁹ For arts organizations, this has meant increasing rents and difficulty finding spaces in areas of the city that are well served by transportation infrastructure. The Independent Publishing Resource Center most recently nearly collapsed due to housing, among other issues. At the same time, retail space remains abundant in downtown Portland, as more and more retailers move online. In addition, there are a significant number of high-rise buildings being constructed in the downtown core, all with retail on their ground floor. Though the city is growing rapidly, it is difficult to predict how these divergent patterns will play out. Similar issues are prevalent in nearly all the major urban centers in the country.

It is important to note that rising rents are disproportionately impacting communities of color, pushing them farther and farther east in the city and causing a crisis in housing that will cause lasting damage to these communities.⁴⁰

The digital world continues to evolve at a rapid pace, in ways that are not always predictable. From a communications perspective, institutional messages need to be pushed out to an ever-increasing array of platforms that demand staff time and attention, not to mention content. In terms of hardware, change is less rapid, with the exception of data storage and applications migrating to the cloud and gradually eliminating the need for organizations to own servers or software but requiring long-term rental or service contracts. Database technology continues to be refined and is gradually becoming more customizable and affordable.

Workforce flexibility is critical to recruitment and equity work on many levels. This means having the technology—laptops, cloud storage, and so on—that can accommodate workers both on- and off-site.

Current Platform

In September 2011, Literary Arts moved into its own dedicated home for the first

39 <https://www.theatlantic.com/business/archive/2016/05/the-real-roots-of-portlands-housing-crisis/482988/>

40 <http://www.coalitioncommunitiescolor.org/multco-unsettling-profiles>

time in its then 27-year history. Around that time, the organization replaced virtually every single piece of physical infrastructure, from desks to computers, telephones, printers, and file cabinets. In 2015, following the acquisition of Wordstock (and other programmatic expansions), Literary Arts expanded its space and added 1,333 square feet, bringing our total space to 3,982 square feet. The need for this expansion had already been noted in the last assessment as part of the 2014–2017 Strategic Plan.

Generally speaking, our downtown office is busy from 8:00 a.m. until 9:00 p.m. most weekdays and is also busy on the weekends. From a program perspective, classes, seminars, and events fill the Library and the Studio most evenings (though less so in the summer). In FY 2017–2018, there were 19 public events, 45 writing classes, and 19 seminars serving over 2,323 people. These numbers do not include the usual business meetings for staff, committees, and the board that occur in this space.

In terms of our equity work, many of our events are in partnership with culturally specific organizations, in addition to classes and seminars that feature writers of color (see Oregon Book Awards & Fellowships and Delve Readers Seminars sections of this assessment). This work is intended to create a diverse and welcoming artistic space in downtown Portland, which has traditionally been very white.

Since 2015, we have added more staff than anticipated; therefore, we find ourselves at nearly 100% capacity during the busy period in the lead-up to the Portland Book Festival when we have a number of seasonal employees. It is worth noting that our current lease will expire in June 2022.

In terms of technology, the organization continues to add services and devices as it grows. In the 2014 assessment, we noted that we had not met our goal in replacing the database. Since then, we have learned to customize and adapt FileMaker, and we feel this is the right choice for the organization in terms of cost and flexibility. The major brands in databases are either far too expensive, with both large up-front costs and recurring licensing fees, or not built to track both sales and donations in ways that we currently need. We have also added the capability to print tickets in the office through software that is integrated with the ticketing software service used by Portland's.

Next Evolution

This section will be largely filled out and complete once the planning process is closer to completion and programmatic goals are clear.

If we intend for the organization to continue to grow, then we will need additional administrative space and classroom/event space. We have the following options for growing our square footage:

Lease more space in the Pittock Block building and continue to grow organically. Space may or may not be contiguous depending on what becomes available.

Consider moving to a new larger space that has potential to be grown and/or even evaluate owning a building.

Open satellite spaces in other parts of the city and connect these spaces to our equity work. These spaces could be short-term leases and move with the city's changing neighborhoods.

All of these options contain their own unique challenges, whether practical, financial, or managerial. Solutions can be found through partnerships with developers, government agencies, or other nonprofits. Each should be explored, and we should have a solid plan in place no later than the end of 2019. One possible recommendation could be forming a staff/board committee to assess needs and options. Literary Arts should also be active, with both elected officials and developers, in advocating for affordable space for arts organizations as critical to the overall health of the city.

In terms of technology, we will continue to invest in hardware and software that increases flexible working hours and locations. With cloud storage becoming cheaper and more secure, it is likely we will need to replace our server with a cloud-based solution, along with many of our business applications. If the staff size continues to grow, we will need more IT support. Likewise, we will need clearer policies around the software that is expected to be used and, in the case of part-time employees, who receives laptops and other technology. In the first year of this plan, these policies should be finalized.

SUMMARY OF INFRASTRUCTURE GOALS (LARGELY TK)

Evaluate and respond to programming and administrative needs as they relate to our physical location and facilities.

Evaluate and respond to programming and administrative needs as they relate to our digital infrastructure.