

PLANNING & ECONOMIC DEVELOPMENT COMMITTEE

MAY 3, 2016

7:00 p.m.

City Hall Auditorium

ROLL CALL

PRESENTATIONS

Nashua Performing Arts Center Feasibility Study

COMMUNICATIONS - None

UNFINISHED BUSINESS - None

NEW BUSINESS - None

GENERAL DISCUSSION

PUBLIC COMMENT

REMARKS BY THE ALDERMEN

POSSIBLE NON-PUBLIC SESSION

ADJOURNMENT

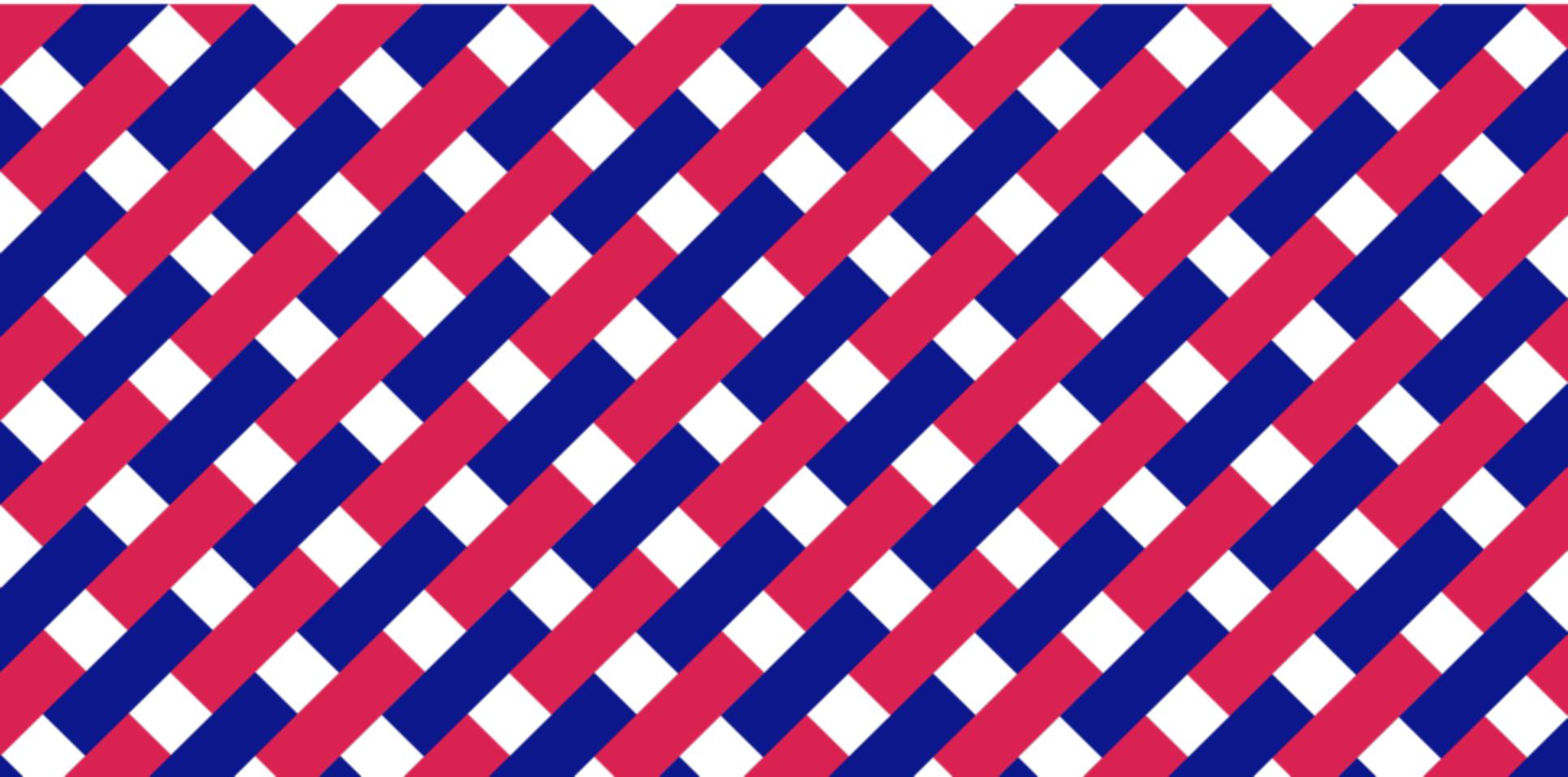
building creativity



May 3, 2016

Nashua Performing Arts Center Feasibility Study

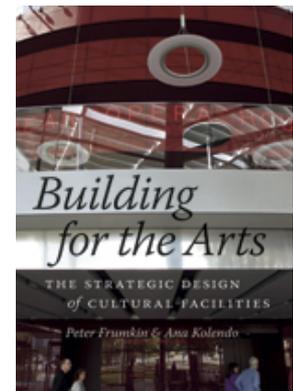
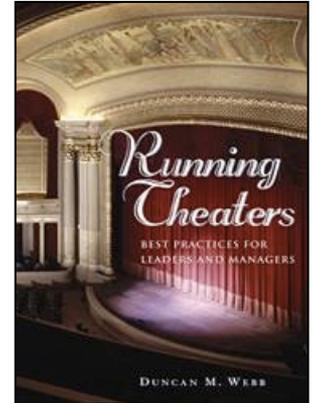
The City of Nashua



Webb Management Services

Background

- * Management consulting practice for cultural facility development and operations
- * Small and focused company based in NYC
- * Clients are governments, arts groups, developers, and educators
- * In our 19th year, starting our 363rd project
- * In 2001, we completed the original feasibility study for this project.
- * Other regional projects in Laconia, Peterborough, Keene, Lowell (MA), Framingham (MA), Lynn (MA), Worcester (MA), and Fitchburg (MA).



Study brief + background

- * The idea of building a performing arts center in Downtown Nashua has been under consideration for nearly 15 years.
- * Significant cultural development has been accomplished since the genesis of the idea.
- * While some community leaders and local residents think that a performing arts center would be another important catalyst for downtown development, there is much work to be done around the idea.
- * Webb Management Services has been hired to establish whether or not building a theater in downtown Nashua is feasible. Our work will assess the market for the arts in Nashua, demand for performance space, the current supply of performance facilities in the region, and the goals of the City for the future.



Study informants

To complete this study, we have conducted a series of confidential in-person and telephone interviews. We would like to take this opportunity to thank all of the people who have participated in the study to date.

- * Lauren Boss, Nashua Area Artists' Association
- * Craig Brennan, Actorsingers
- * Alec Buchanan, Alexander S. Buchanan, PLLC
- * Judy Carlson, City Arts Nashua
- * Karin Cevasco, Gate City Charter School for the Arts
- * Jim Donchess, Mayor of the City of Nashua
- * John Egan, Nashua Arts Commission
- * Carol Eyman, Nashua Public Library
- * Walter Freeman, Nashua School District
- * Jill Gage, Fortin Gage Flowers + Gifts
- * Peggy Gilmour, State Senator
- * David Gottesman, Gottesman + Hollis, PA
- * Jean Gottesman, Courier Art Museum
- * Meri Goyette, Community Member
- * Ken Grabeau, Monarch Instrument
- * Dave Grebowski, Fay's Fine Cabinetry
- * Bonnie Guercio, Artist
- * Jamison Hoff, NH Charitable Foundation
- * Morgan Hollis, Gottesman + Hollis, PA
- * Sheetal Kelkar, Mrs. India New England
- * Emerson Kelly, Peacock Players
- * John Koutsos, Alec's Shoe Store
- * Paul LaFlamme, Spartans Drum + Bugle Corps
- * Richard Lannan, The Lannan Company, Inc.
- * Amber Logue, Positive Street Art
- * Donnalee Lozeau, Former Mayor, City of Nashua



Study informants

- * Ginnie Lupi, New Hampshire State Council on the Arts
- * Latha Mangipudi, State Representative
- * Jonathan McPhee, Symphony New Hampshire
- * Mary Ann Melizzi-Golja, City of Nashua
- * Teresa Moler, Blue String Marionettes
- * Greg Newton, Symphony New Hampshire
- * Kristin Olsen, Symphony New Hampshire
- * Bob Oot, Symphony New Hampshire
- * Kathleen Palmer, The Telegraph
- * Rob Prunier, Harvey Construction Corporation
- * Liz Racioppi, Elizabeth Grady Salon
- * Manuel Ramirez, Positive Street Art
- * Susan Randazzo, Indian Hill Music
- * Lindsay Rinaldi, Nashua Community Music School
- * Sarah Roy, North Main Music
- * Steve Ruddock, Riverwalk Café + Music Bar
- * George Russell, WSMN 1590
- * Paul Shea, Great American Downtown
- * Jacqueline Shima O'Dowd, Nashua Chamber Orchestra
- * Jon Spira-Savett, Temple Beth Abraham
- * Daniel D.Rok Swain, Positive Street Art
- * Eric Valliere, Symphony New Hampshire
- * James Vayo, Renaissance Downtowns
- * Keith Weirich, Peacock Players
- * Chris Williams, Velocity Performance
- * Lori Wilshire, City of Nashua
- * Gary Wingate, Wingate's Pharmacy



Forces + trends



Forces + trends

- * Decline in traditional performing arts audiences
- * Decline in traditional public sector arts funding
- * Increasing competition for private sector philanthropy
- * Increasing fragility of nonprofit arts organizations

At the same time...

- * Increasing active arts participation
- * Sector-driven education and outreach
- * Improving arguments for the “value” of the arts



Forces + trends: the improving value proposition

- * The arts and:
 - * Economic development
 - * Creative place-making
 - * Downtown revitalization
 - * Cultural tourism
 - * Quality of life
 - * Business and workforce development and retention
 - * Community development
 - * Arts in education
 - * Healing—physical, mental, spiritual, and community



Forces + trends: how facilities respond

- * Moving from “Friday Night Lights” to “the Community Living Room”
- * Enhancing the social experience
- * Including participatory programs and spaces
- * Providing low cost of access
- * Supporting a broad range of programs and audiences, integrating the traditional, the popular, the new, and the challenging
- * Responding to the particular needs, challenges, and opportunities of the community

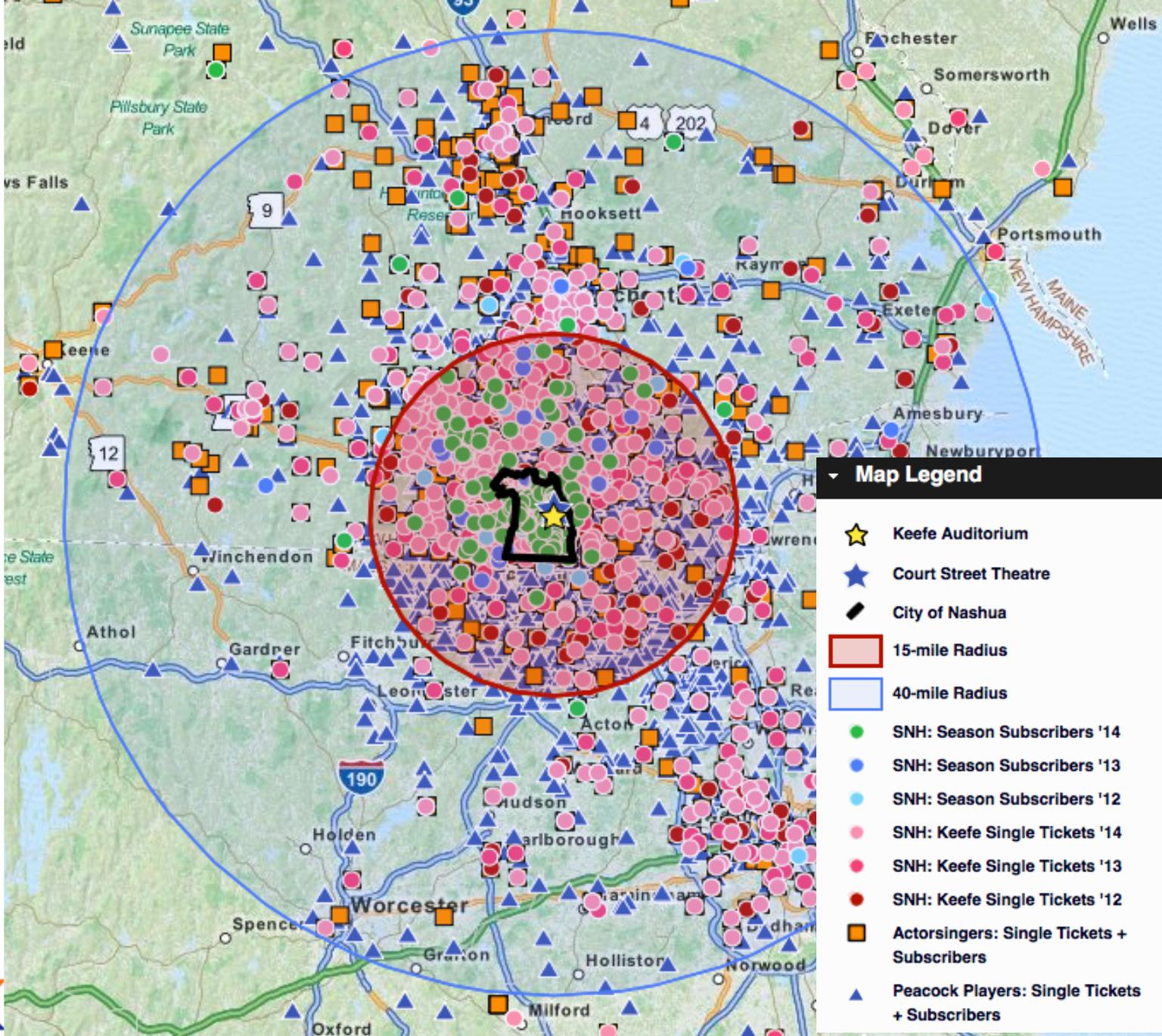


Market analysis



Market analysis: segments one, two + three

- * Market segment 1 is defined as the City of Nashua.
- * Market segment 2 is defined as the 15-mile radius surrounding the Keefe Auditorium.
- * Market segment 3 is defined as the 40-mile radius surrounding the Keefe Auditorium.

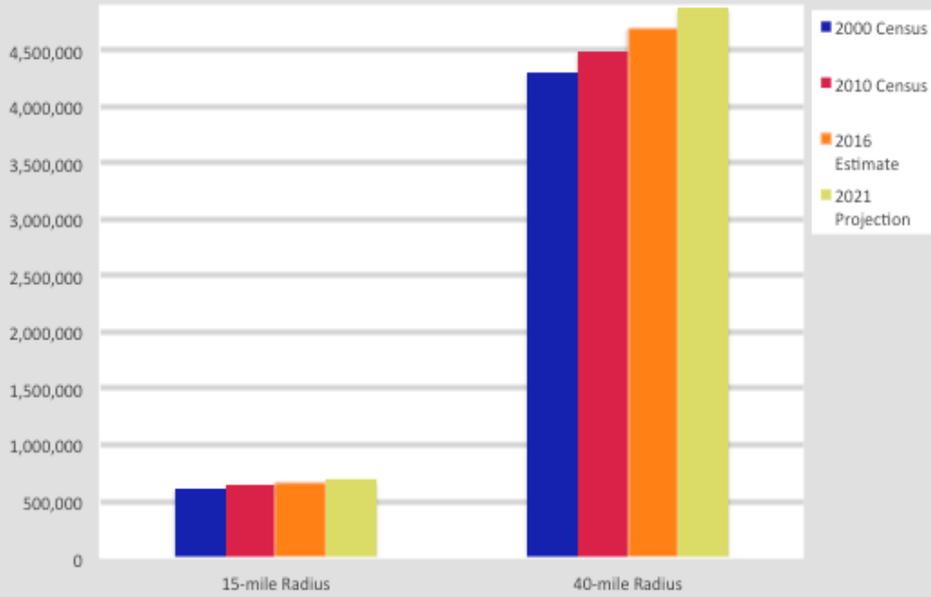


Map Legend

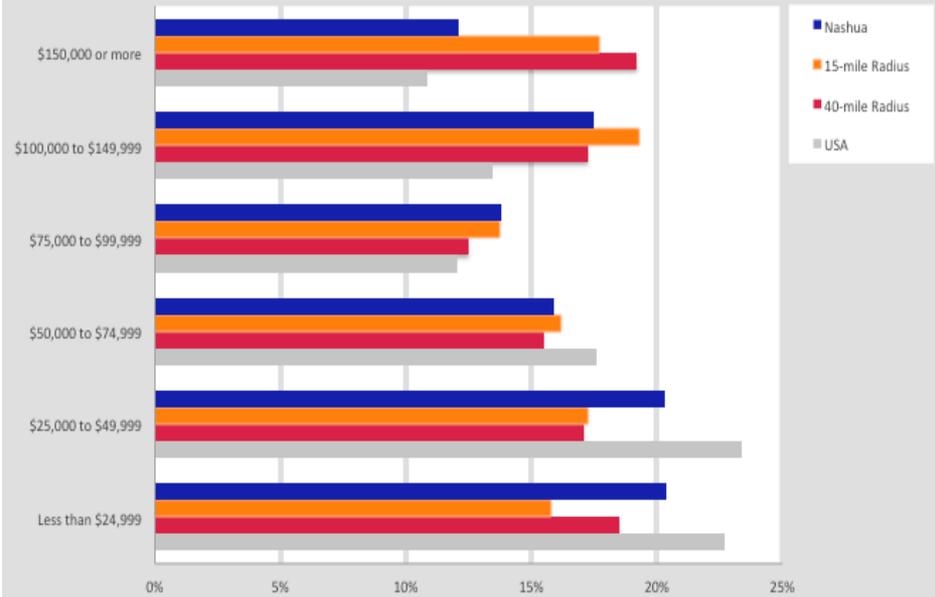
- ★ Keefe Auditorium
- ★ Court Street Theatre
- ▬ City of Nashua
- 15-mile Radius
- 40-mile Radius
- SNH: Season Subscribers '14
- SNH: Season Subscribers '13
- SNH: Season Subscribers '12
- SNH: Keefe Single Tickets '14
- SNH: Keefe Single Tickets '13
- SNH: Keefe Single Tickets '12
- Actorsingers: Single Tickets + Subscribers
- ▲ Peacock Players: Single Tickets + Subscribers



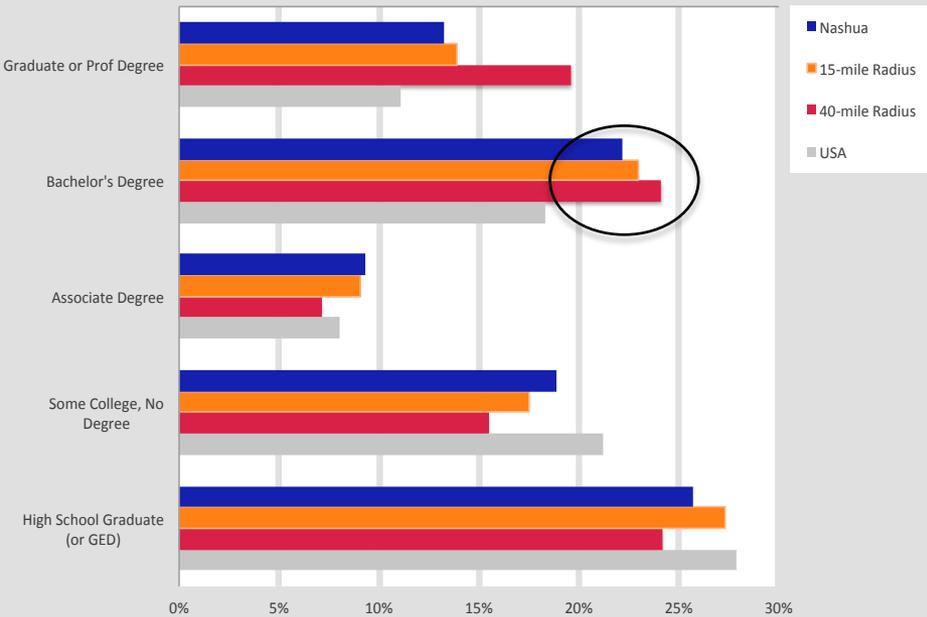
Population Growth: Regional Market



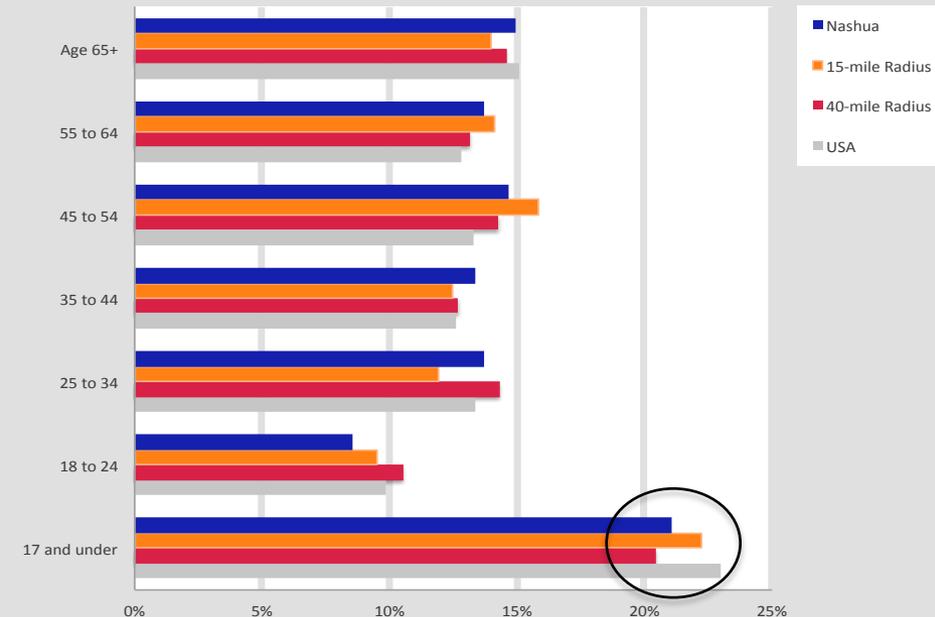
Household Income Distribution



Educational Attainment



Age Distribution

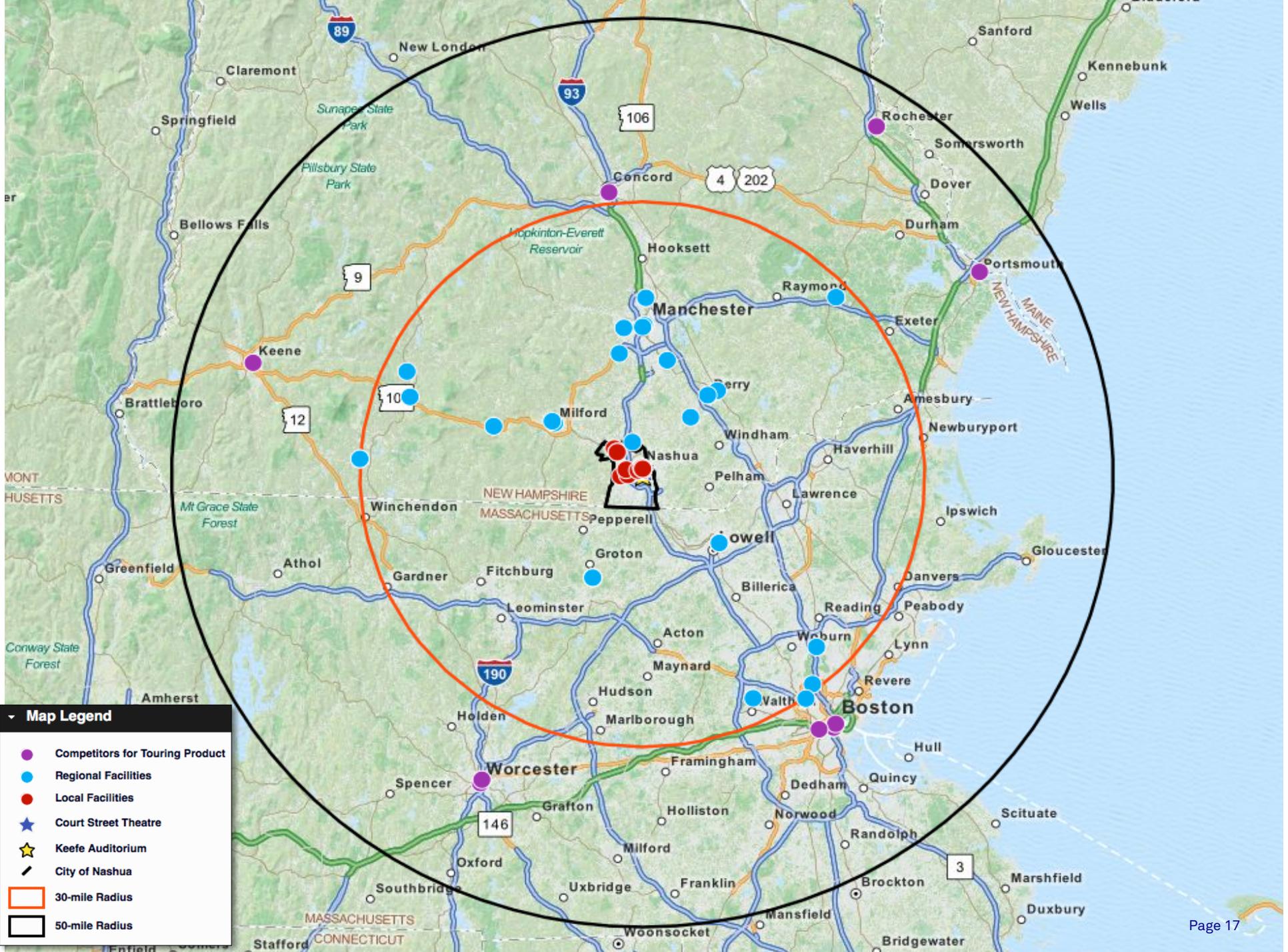


Market Conclusions: By Segment

	Size*	Growth	Characteristics	Conclusions
Nashua	87,477	↑	Slowly growing population; Diverse in age with a large number of families; Varying household incomes + levels of educational attainment; Racially + ethnically diverse with a large Indian American community	Opportunities for increased family, culturally specific + hands-on programming; Need for price-sensitive programs and facilities
15-mile Radius	668,901	↑	Growing population; Diverse in age with a large number of families + Millennials; Affluent; Varying levels of educational attainment; Racially + ethnically diverse	Opportunities for increased family, culturally specific + hands-on programming; Propensity for supporting traditional arts
40-mile Radius	4,693,531	↑	Growing population; Diverse in age with a large number of families; Affluent; Well-educated; Racially + ethnically diverse	Opportunities for increased family + culturally specific programming; Propensity for supporting traditional arts; Possible demand for jazz events and programs
Tourism	38.4M	↑	Outdoor recreation oriented with arts + entertainment participation	Recreation-based programs + events; Partnership development with Visit NH

Existing facilities



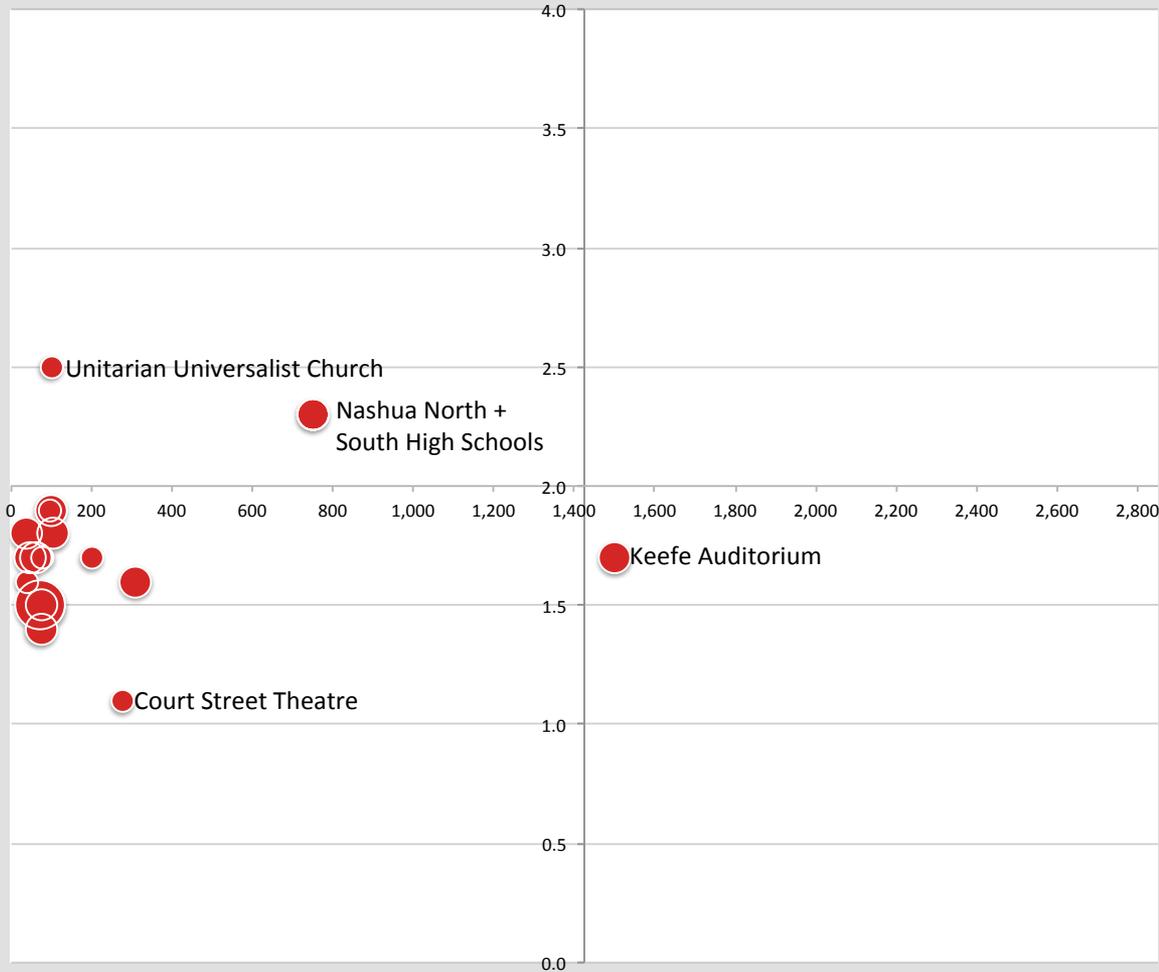


Map Legend

- Competitors for Touring Product
- Regional Facilities
- Local Facilities
- ★ Court Street Theatre
- ★ Keefe Auditorium
- City of Nashua
- 30-mile Radius
- 50-mile Radius

Existing performance facilities: capacity + quality

Facility Rating vs. Capacity

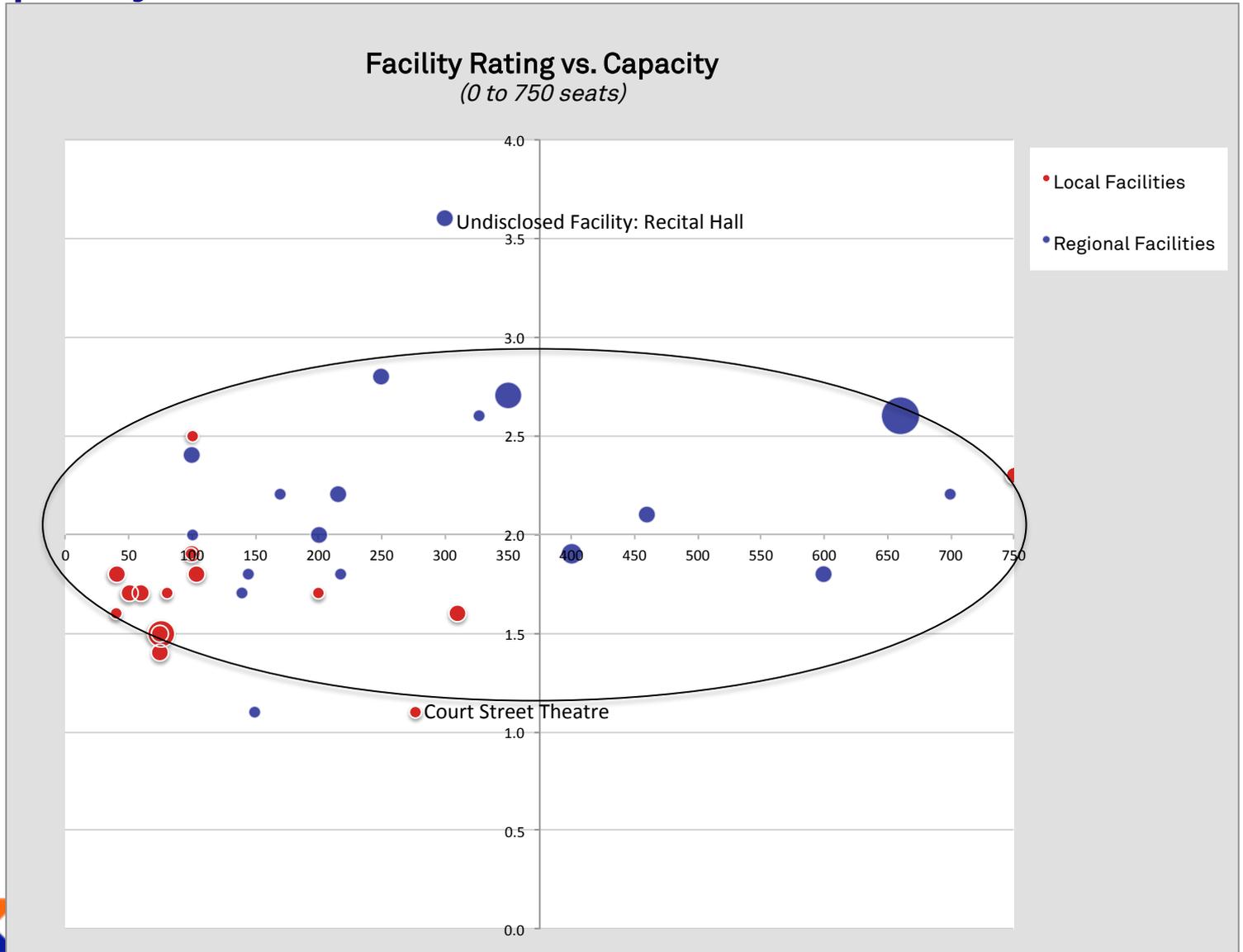


Local Facilities

- Local Performance Facilities:**
- Keefe Auditorium
 - Nashua High School North
 - Nashua High School South
 - Nashua Community College: Gregg Hall Aud.
 - Court Street Theatre
 - The Peddler's Daughter
 - Stella Blu
 - Chunky's Cinema Pub
 - Unitarian Universalist Church: Auditorium
 - Hunt Building
 - Riverwalk Café + Music Bar
 - Public Library: NPL Theater
 - Nashua Community Music School: Recital Hall
 - Fody's
 - Country Tavern: Loft
 - Country Tavern: Tack Room
 - Public Library: Music/Art/Media Wing
 - Public Library: Children's Room

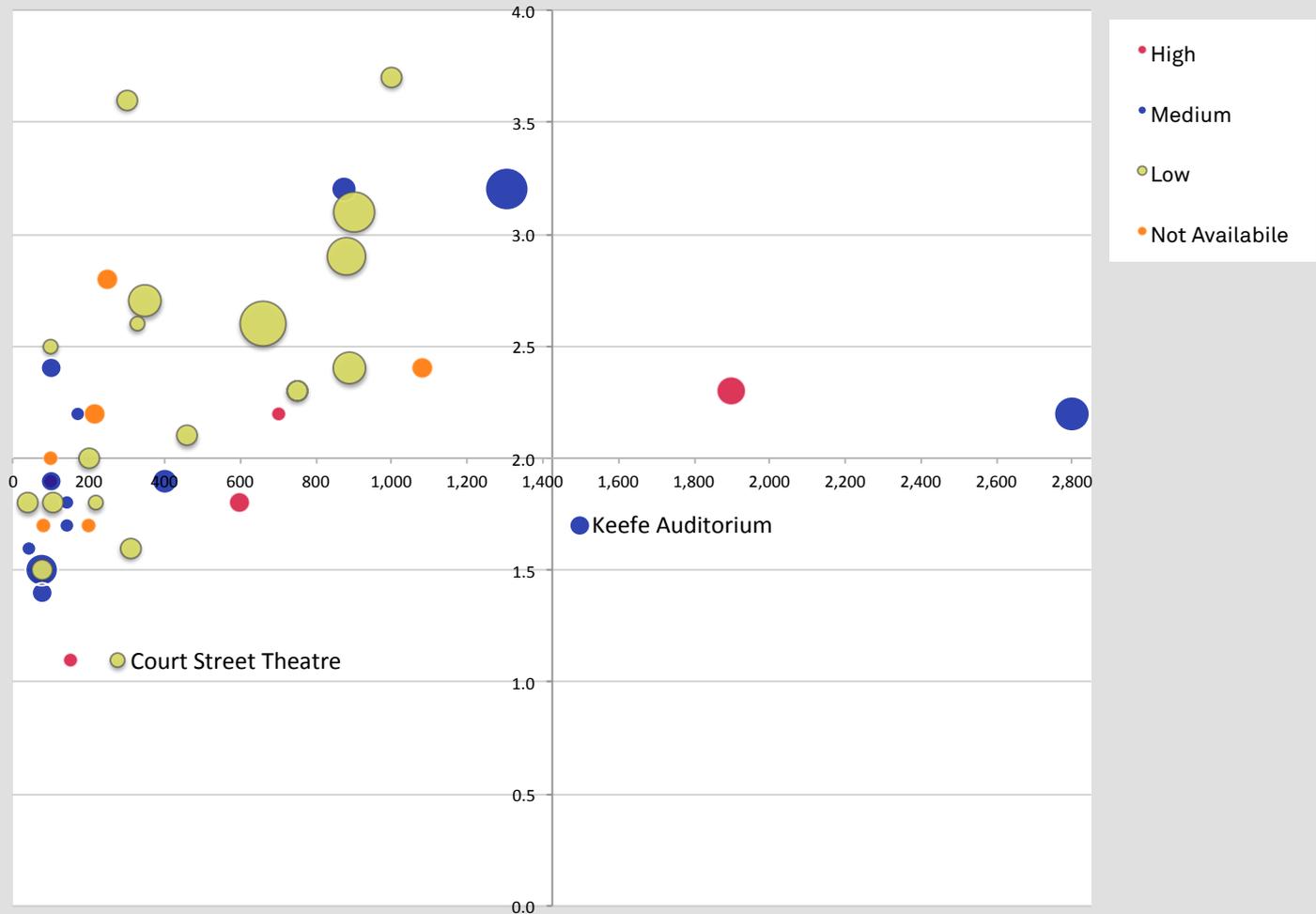


Existing performance facilities: capacity + quality



Existing performance facilities: availability

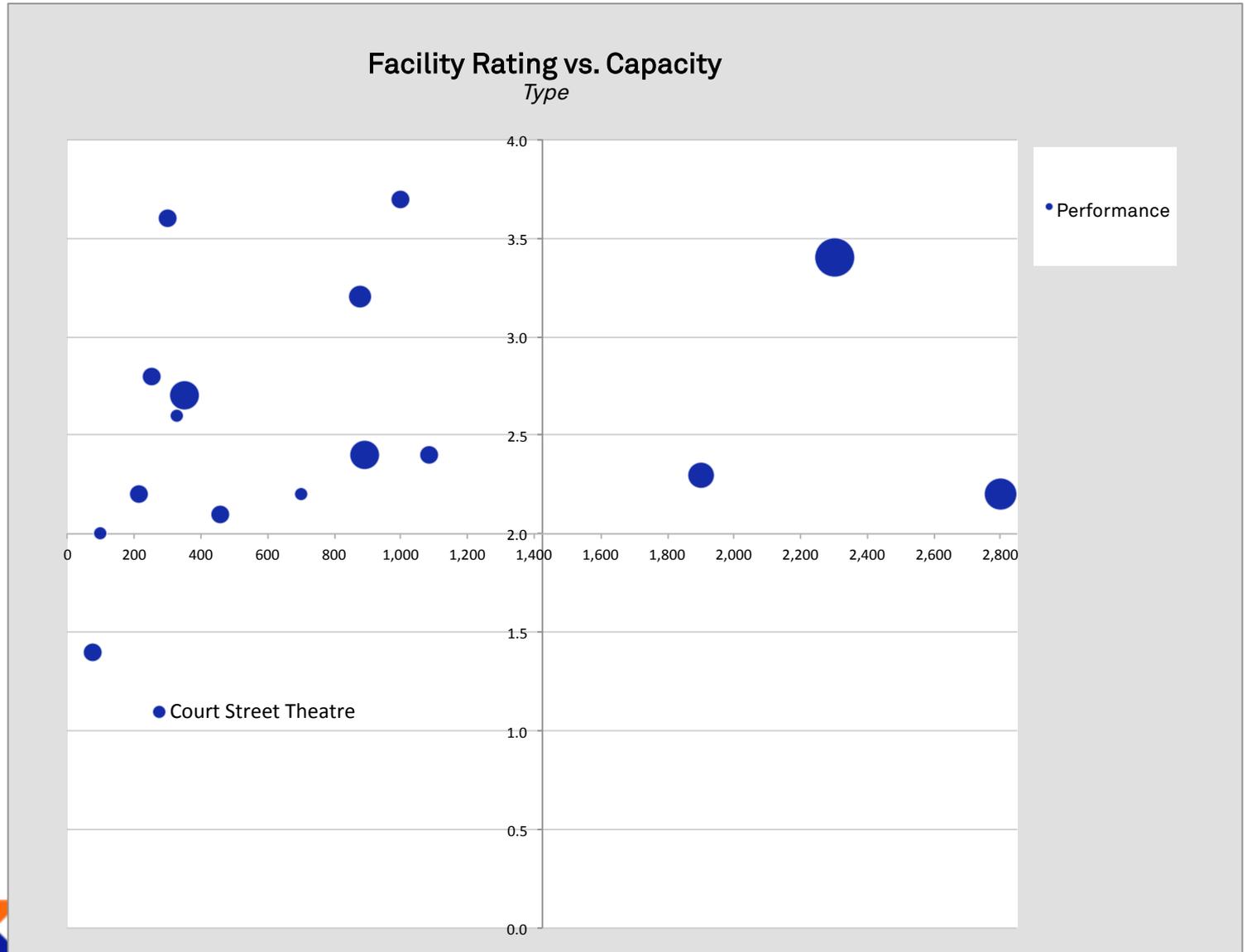
Facility Rating vs. Capacity
Availability



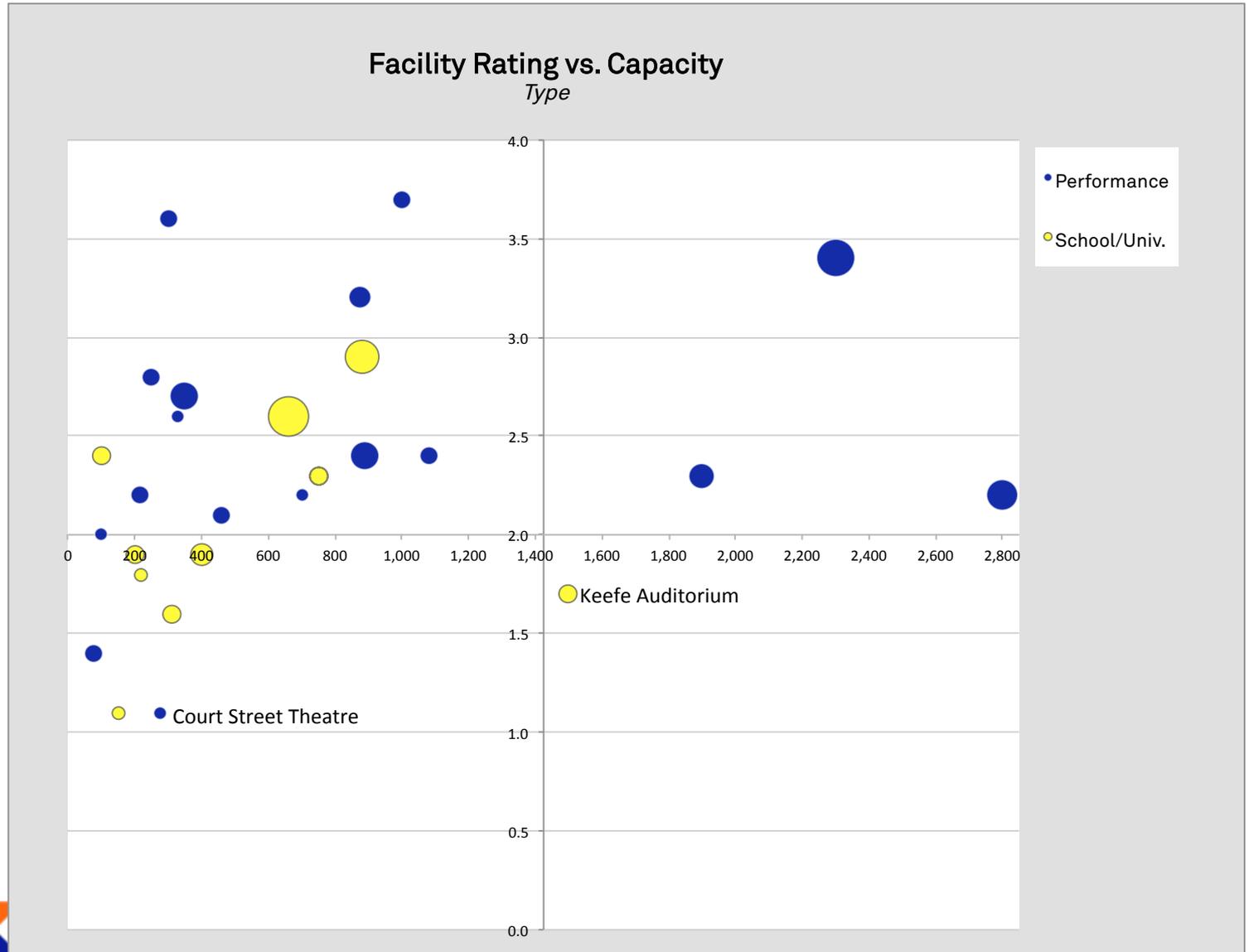
**Availability is determined by how open a facility's schedule is for outside groups to book on prime days (Thursday, Friday, and Saturday).*



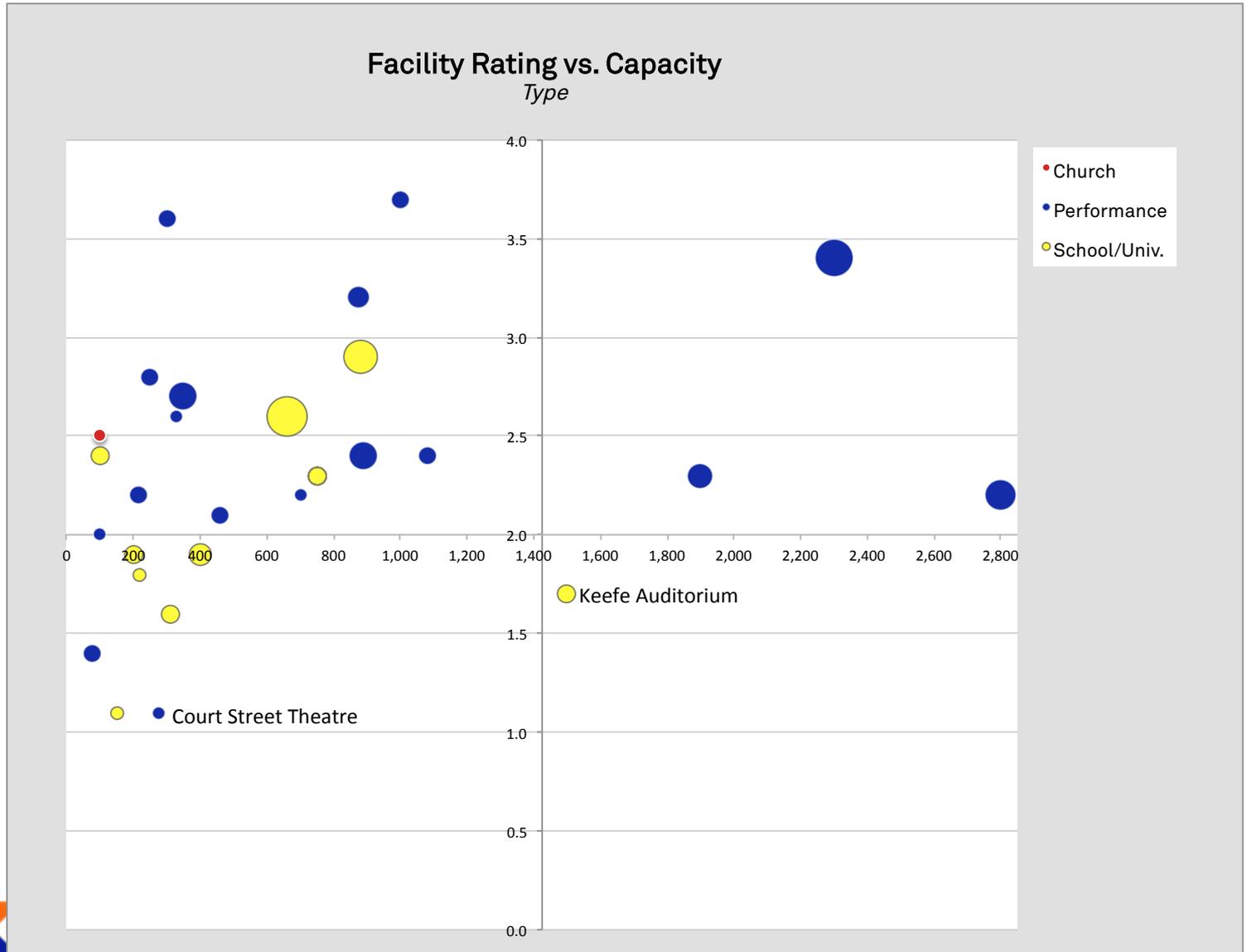
Existing performance facilities: venue type



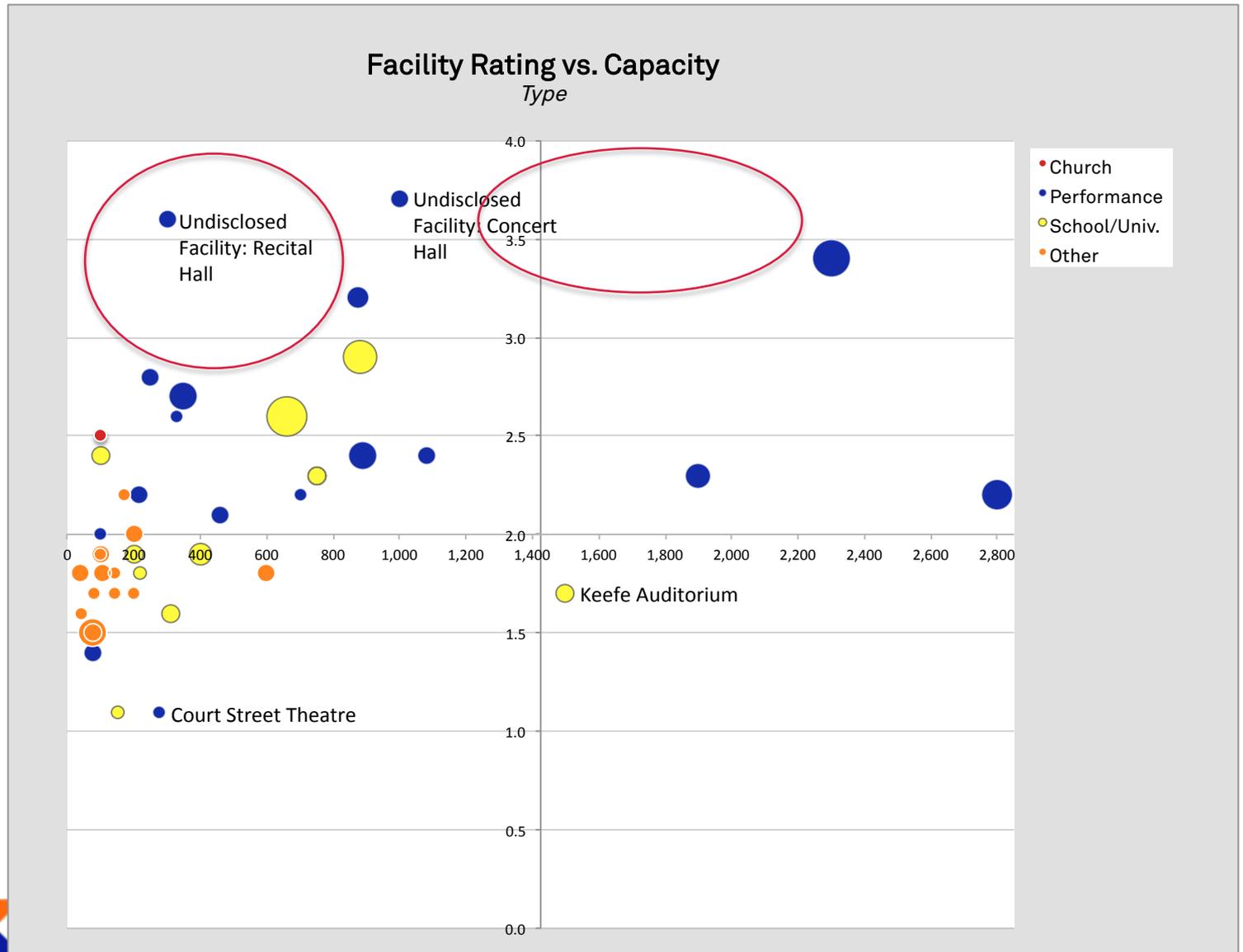
Existing performance facilities: venue type



Existing performance facilities: venue type



Existing performance facilities: venue type



Existing performance facilities: conclusions

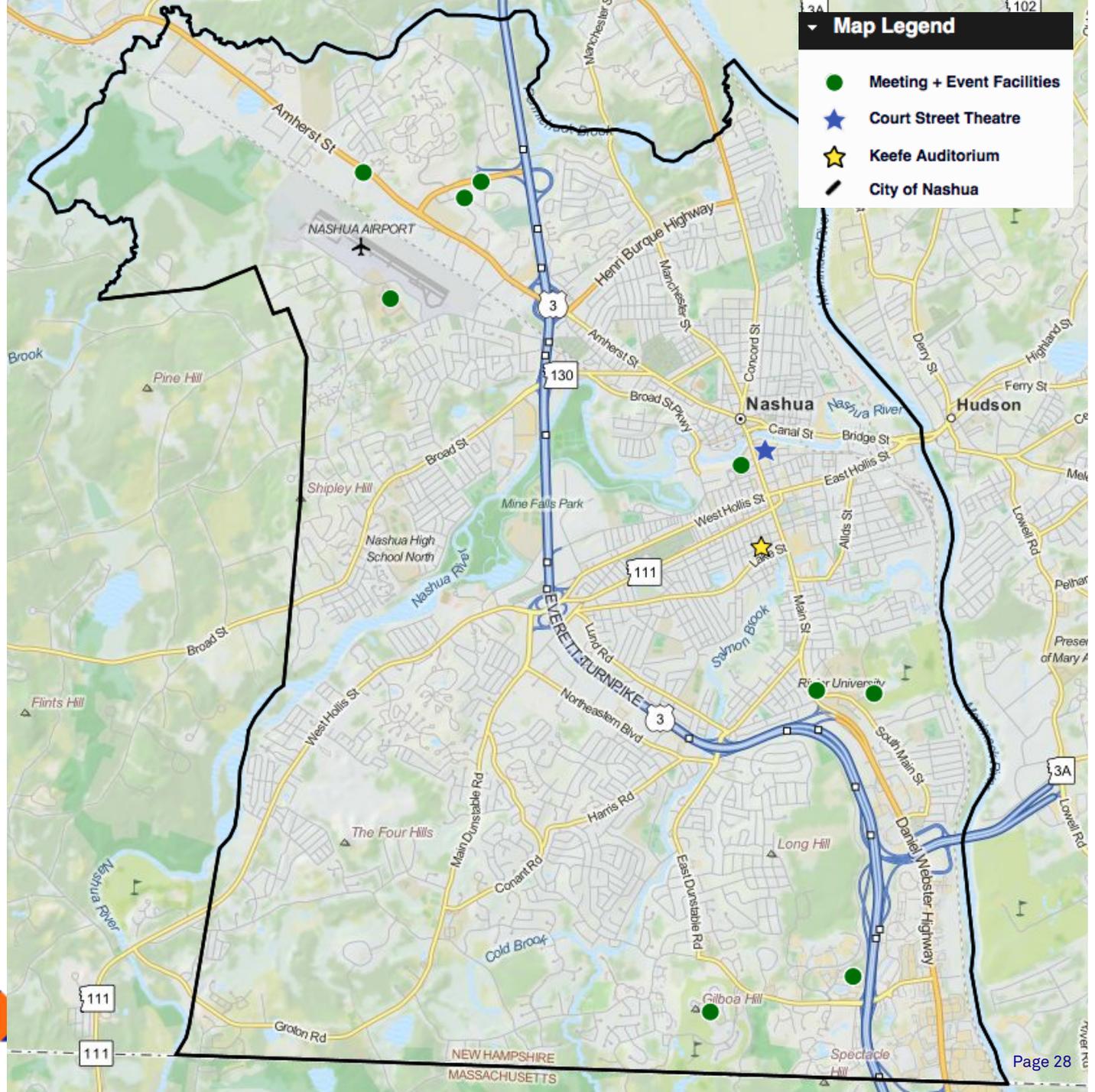
- * In total, 43 facilities were inventoried: 18 locally and 25 regionally.
- * Locally, facilities have low quality ratings (scoring between 1.0 and 2.0) and are small in size: more than half have capacities below 100 and are categorized as 'other'.
- * Regionally, venues have much higher quality ratings (scoring between 2.0 and 4.0) and cover a variety of capacities.
- * When it comes to availability, more than half of the facilities inventoried have low or no availability. Those facilities with medium to high availability tend to be lower in quality and smaller in size.
- * Seventeen of the inventoried facilities are performance spaces, and an additional eleven are performance spaces associated with schools. These facilities tend to vary in capacity and have higher quality ratings.
- * A new arts complex is planned to enter the market in 2017. Proposed facilities include a 300-seat recital hall and a 1,000-seat concert hall. Programming will be music oriented and will include presenting. Even with these facilities in mind, we see a gap for new, or renovated, facilities that can accommodate dance and theatre in the 200-600 and 1,200 to 2,000 capacity ranges.



Existing meeting + event facilities

Local Meeting + Event Facilities:

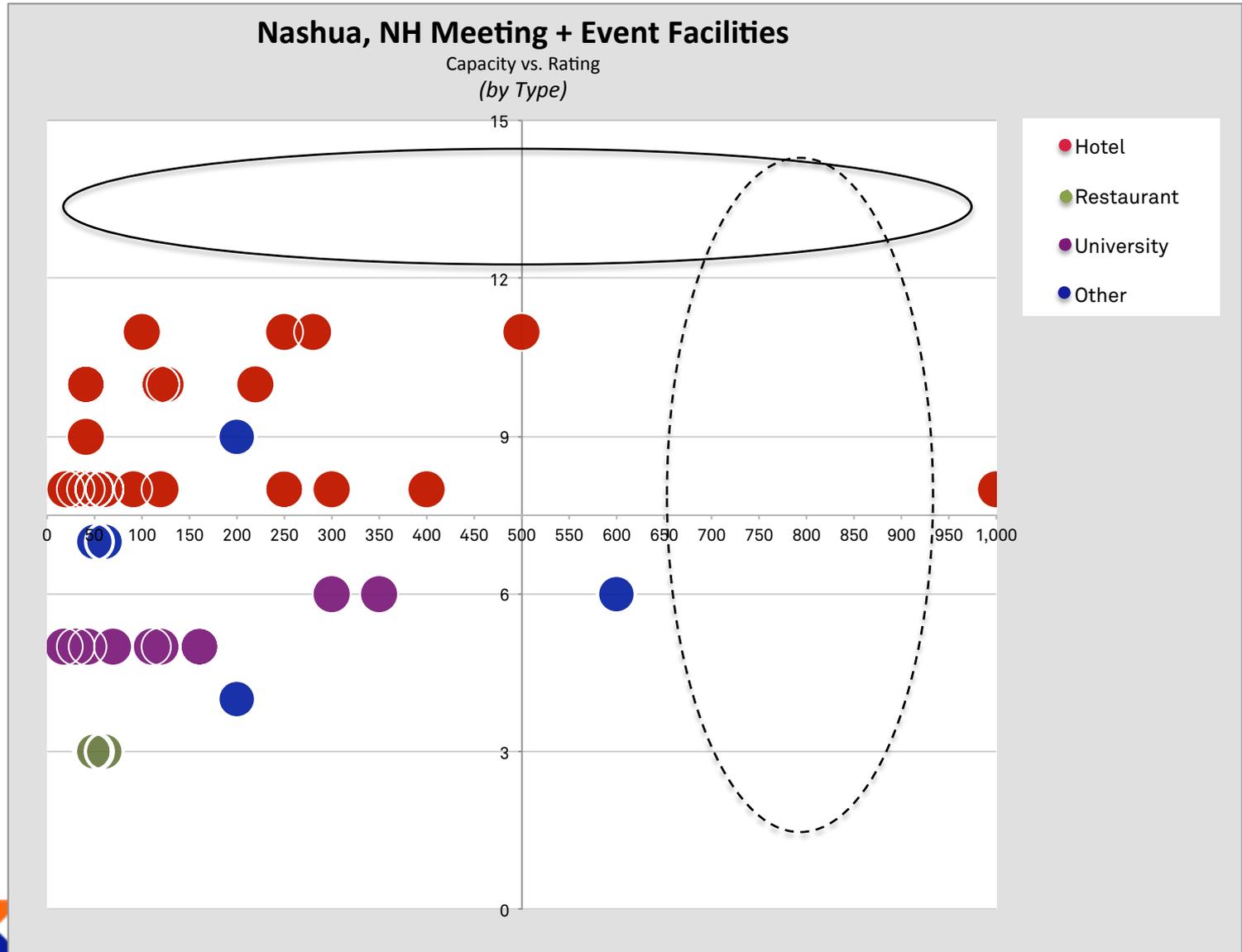
- Courtyard Marriott Hotel
- Crowne Plaza
- Holiday Inn Hotel + Suites
- Radisson Hotel
- Nashua Country Club
- Sky Meadow Country Club
- Welcoming Light, Inc.
- Country Tavern
- Daniel Webster College
- Rivier University



Existing meeting + event facilities: type

Meeting + Event Facilities Conclusions:

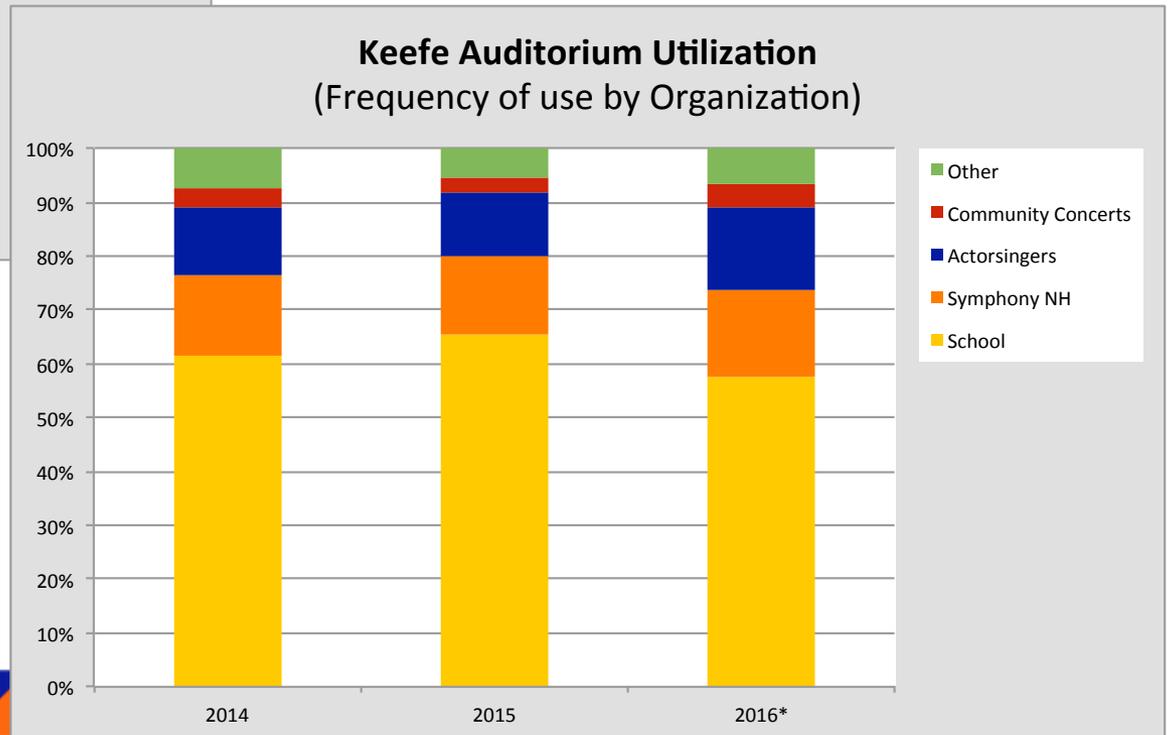
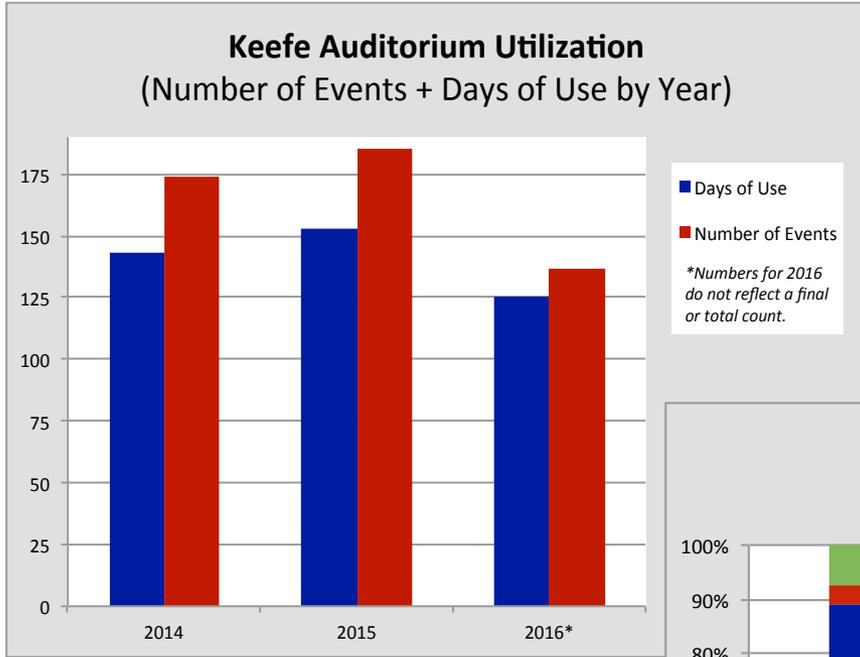
* Based on the meeting and events inventory, we can say that there is a gap in the market for a high quality meeting and events facility with a unique atmosphere, outdoor space, and state-of-the-art tech and A/V equipment.



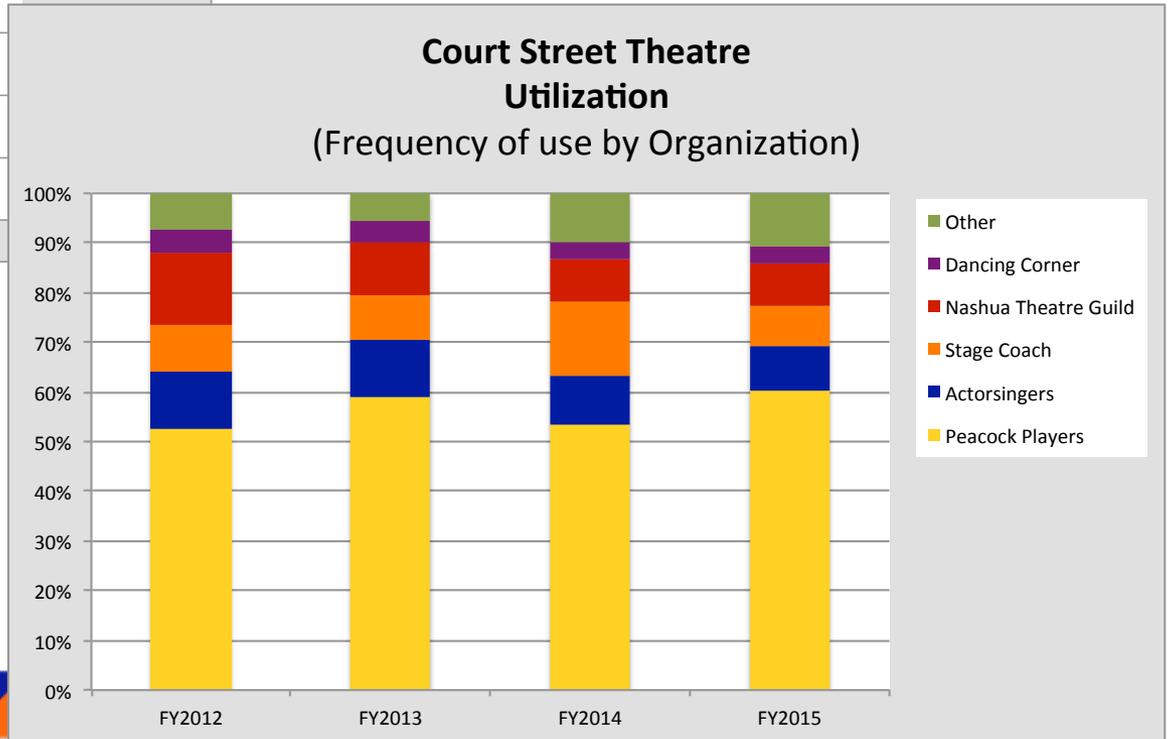
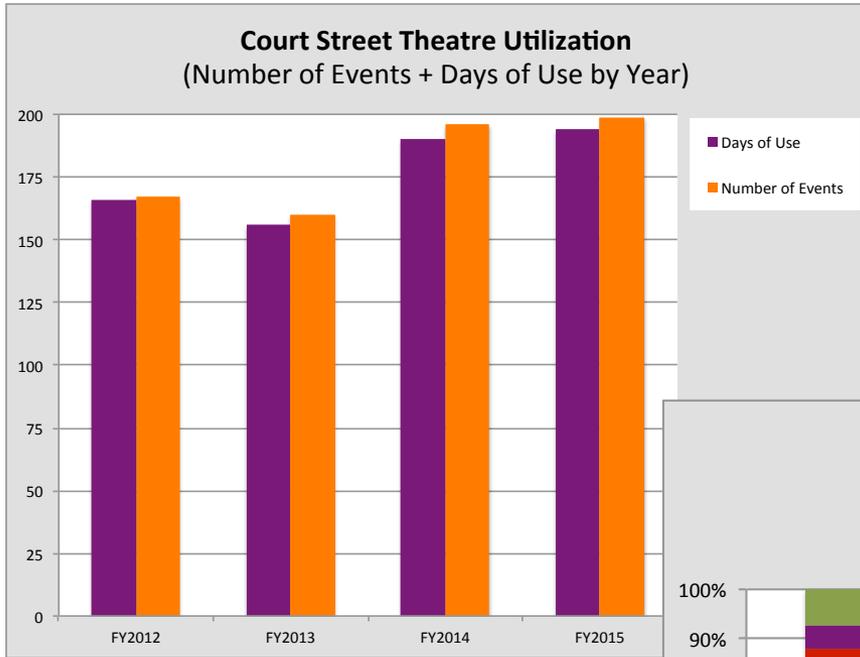
Utilization



Utilization: keefe auditorium



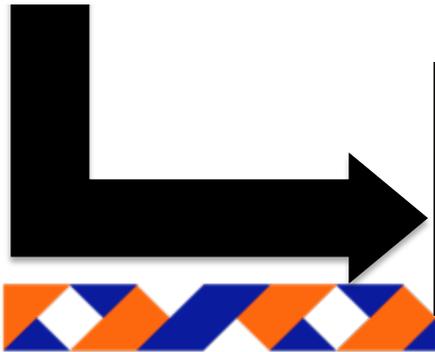
Utilization: court street theatre



Utilization: user demand

User Demand: Performance + Classroom Space	Rehearsal/ Tech	Performances	Other	Total	Capacity	Classroom Space Demand
Symphony New Hampshire	7	15	1	23	1100	-
Actorsingers (Large Space)	16	6	-	22	750	-
Gate City Charter School for the Arts	-	2	45	47	500	-
Positive Street Art	4	4	-	8	500	-
Spartans Drum + Bugle Corps*	-	-	2	2	500	-
Steve Ruddock/Riverwalk Café	-	24	-	24	400	-
Peacock Players	30	36	166	232	350	166
Actorsingers (Small Space)	16	6	-	22	350	-
North Main Muisic School	2	2	-	4	300	2
Nashua Community Music School	10	10	-	20	250	312
Nashua Chamber Orchestra	-	9	-	9	200	-
Blue String Marionettes	-	4	-	4	200	-
Nashua North High School: Theatre Arts	8	6	-	14	100	-
Daniel D. Rok Swain (Dance Instructor)	-	-	-	0	-	208
Sheetal Kelkar (Indian Dance Instructor)	-	-	-	0	-	3
Total Days of Use:	93	124	214	431	-	691

*estimated capacity



User Demand Summary: Performance Facilities (13 Users)*	Rehearsal/ Tech	Performances	Other	Total
750+ seats (2 users)	23	21	1	45
351 to 500 seats (4 users)	4	30	47	81
350 seats or fewer (7 users)	66	73	166	305
Total Days of Use:	93	124	214	431

*Actorsingers is counted twice to account for demand for multiple facilities

Utilization: key potential partners

- * ***The Educational Sector:*** Nashua and the surrounding region are home to multiple educational institutions, including Rivier University, Nashua Community College, Daniel Webster College, the University of New Hampshire, and Southern New Hampshire University. A partnership with one or more of these entities would connect new arts spaces to an experienced facility operator, insure a certain level of use, and provide a certain amount of financial stability.
- * ***Local Developers:*** There are handful of active developers in Nashua working to repurpose the city's former warehouses. Some of these projects have been very arts-friendly (The Nashua Area Artists' Association Gallery is currently housed in a commercial building downtown, which also displays the work of local artists throughout the building).
- * ***The Tech + Business Communities:*** Nashua's tech and business communities are growing. New arts facilities could be used for product launches, retreats, customer appreciation events, and so on.



Utilization: conclusions

- * Nashua has two primary performance facilities: Keefe Auditorium and Court Street Theatre. Keefe Auditorium is regularly used by Symphony NH, Actorsingers, and Nashua Community Concert Association. At Court Street, Peacock Players dominate facility use, renting the theatre for 30 weeks each year. There are, however, opportunities for increased use, specifically at Keefe Auditorium, which is not used at all during the months of July and August.
- * Local demand for a facility with 750 seats or more is limited to 45 days a year. For a facility with 500 seats, there are only 81 days of demand.
- * There is significant demand (305 days) for a facility with 350 seats or fewer, as well as 691 days of demand for classroom space.
- * Peacock Players would be the primary user of a 350-seat facility, while Symphony NH and Actorsingers would be the primary users of a larger, 750-seat or more facility.
- * Future uses for facilities might include meetings, weddings and other events, tech product launches or conferences, arts festivals or events, concerts presented by Riverwalk Café, and so on.



Benefits + impacts



Benefits + impacts

✦ The Nashua Arts Commission released the **Nashua Arts + Cultural Plan** in 2015. The plan outlined six primary goals for the arts in Nashua:

<p>Identity: Create a unique brand to represent Nashua’s culture that distinguishes the city within the region.</p>	<p>Centralization: Develop a collaborative citywide association of arts and culture by understanding and leveraging digital networks and existing venues and spaces within the city.</p>
<p>Education: Engage residents of all ages, backgrounds, and abilities in arts and culture by raising awareness from a young age and integrating culture into educational, recreational, and social activities.</p>	<p>Marketing: Attract visitors and residents to local events by publicizing the Nashua cultural brand through strategic outreach and promotion of the arts to both local and broader audiences.</p>
<p>Commerce: Produce new economic opportunities for the city by integrating the arts into public and business policies, stimulating Nashua to evolve as a sustainable, resilient, and livable community.</p>	<p>Growth: Encourage proliferation, prosperity, and visibility for both existing and emerging organizations in the arts.</p>

The development of new arts facilities is in line with many of these goals, particularly identity, centralization, education, and commerce.



Benefits + impacts

- * The City's **Consolidated Plan for Community Development Block Grant + HOME Investment Partnership Program** (2010) outlines the following goals:
 - * Strengthening Neighborhoods
 - * Improving Economic Opportunities
 - * Improve the Quality of Local Infrastructure
 - * Improve the Quality of Local Community Facilities
 - * Improve the Quality of Public Services

Cultural facilities can help the city achieve these goals in addition to a number of the specific objectives listed in the report, including: improving quality of life issues contributing to neighborhood blight, enhancing the vitality of Downtown Nashua, and improving the quality and increasing the quantity of facilities.



Benefits + impacts

* Other benefits and impacts include:

- * ***Sense of Place + Quality of Life:*** Spaces with programs that engage the public, particularly facilities for arts, education, and outreach programs, have potential to contribute to the character and identity of a community. These types of programs and facilities provide opportunities for cross-sectorial and cross-cultural collaboration, socialization, enhancing sense of community, and providing hands-on experiences attractive to regional residents—all contributing to the community's quality of life.
- * ***Quality of Workforce + Corporate Recruitment:*** Studies suggest that strong arts and cultural communities rank among the top factors for decision makers when considering relocation for employment opportunities as they indicate an educated workforce and high quality of life.
- * ***Neighborhood + Community Development:*** Research has shown that community arts programs have enhanced and improved community development. The arts enable individuals and groups to express themselves, and in the process, become more involved in contributing to the development of their community.
- * ***Teaching Innovation + Creativity:*** Finally, the teaching of the arts is now being recognized as a fundamental need for the North American economy and its workforce, given the automation of many jobs and growing competition from lesser-developed economies.



Conclusions + recommendations



Conclusions + recommendations

- * The case for building a brand new, large-capacity performing arts venue in Nashua is challenged by the city's proximity to multiple large, presenting performing arts centers, the development of a new concert hall nearby, and limited demand on the part of local users for a venue with 750 or more seats.
- * Additionally, the city is already home to two performance venues that are regularly used by the community but that are greatly in need of renovation.
- * With that said, we see tremendous opportunity in Nashua. The organizations that are currently active in the community offer a diverse product, maintain busy schedules, and have demonstrated an ability to grow and develop programs over time. If we look to Positive Street Art as an example, Nashua can be seen as the type of environment that can allow an emerging organization the time, space, and support needed to flourish.
- * Our recommendations, then, are focused on harnessing the city and community's current arts-momentum and resources, directing them at three different options.



Options

1. Partner with a regional college or university on the development of a new downtown arts center
2. Develop a downtown meeting, events, and music center
3. Develop an arts district anchored by a renovated Keefe Auditorium and the Hunt Building



option 1: partner with a regional college or university

What?

- ✦ A partnership between the City of Nashua and one of the region's colleges or universities to create an arts hub along Nashua's Main Street.

Why?

- ✦ Colleges and universities are skilled facility operators. And, with their many programs, departments, and student organizations, they have considerable demand for space.
- ✦ A facility developed in partnership with a college or university would ensure that it is regularly active with programming, draw increased foot traffic to downtown (students, professors, and so on), and, depending on the partnership, take some or all of the pressures of operating a facility off of the City.
- ✦ It would be an opportunity for a college or university to develop a downtown presence in Nashua and could lead to future partnerships between university arts departments and Nashua's performing arts groups.



option 2: develop a downtown meetings, events + music center

What?

- * A large, ballroom-like space that has the flexibility, functionality, and acoustics to host Symphony NH one night, a dj battle produced by Positive Street Art the next, and a State of the City address the following morning.

Why?

- * There is demand in the market for flexible arts spaces, as well as a gap for a non-hotel based meeting and event space with a Downtown location.
- * The Riverwalk Café can't accommodate all of the performance requests that are currently received and is interested in booking a larger venue.
- * Portsmouth's 3S Artspace has set a precedent for such a facility and was frequently cited during interviews as an aspirational arts space.



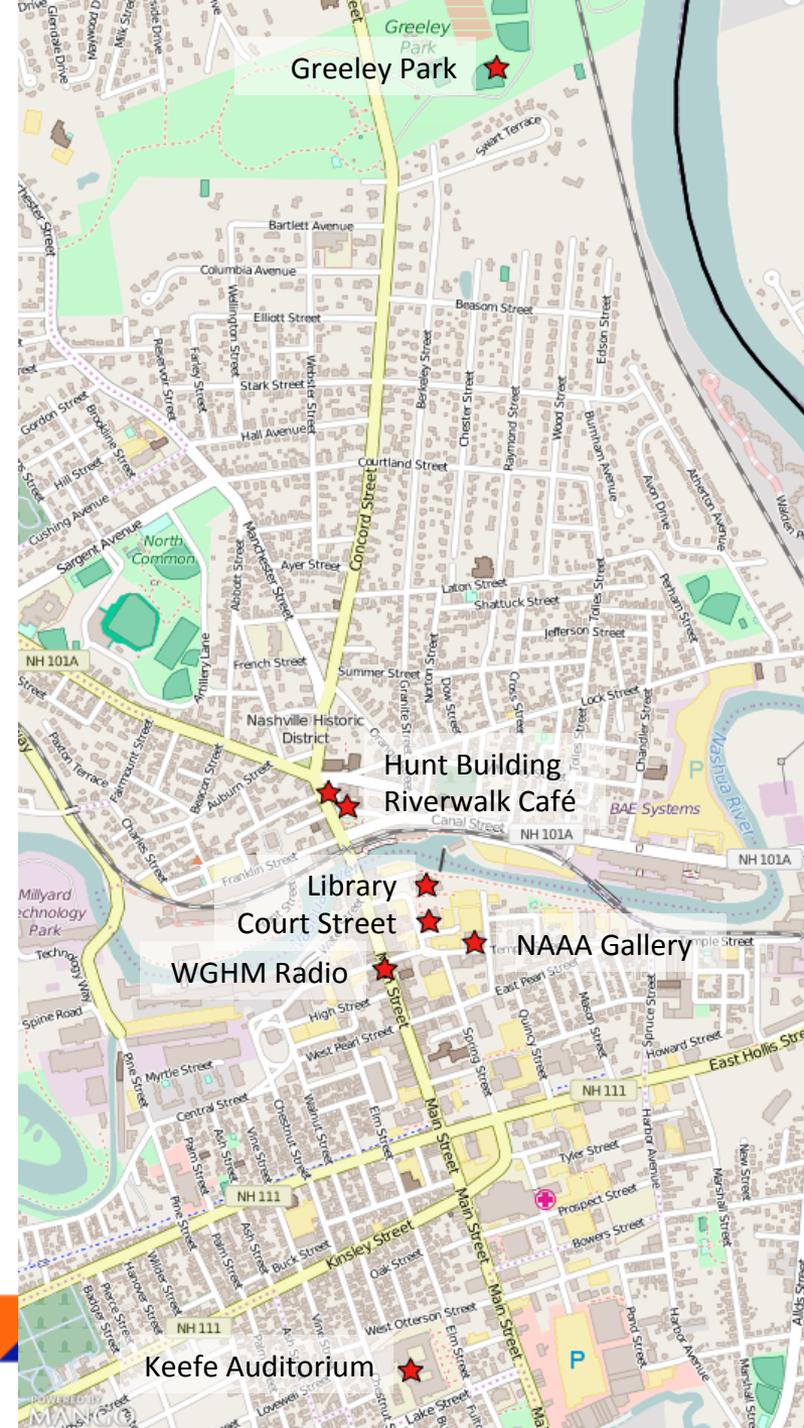
option 3: develop a downtown cultural district anchored by a renovated keefe auditorium + the hunt building

What?

- ✦ A collection of galleries, restaurants, shops, performance venues, and arts education facilities that stretch from a renovated Keefe Auditorium to the Hunt Building, and potentially Greeley Park.

Why?

- ✦ Nashua already has the makings of a walk-able arts district along Main Street, including a number of culturally-active facilities, residential projects in the works, and a community that is used to traveling downtown to go to places like Alec's Shoe Store or attend events like the Holiday Stroll.
- ✦ As part of this option, we would recommend renovating the Keefe Auditorium. This would mean improving the user and visitor experience (including improved concessions). We would also recommend increasing utilization at the Hunt Building.



Preferred option

- * Our preferred option is for an arts district that includes the renovation and/or the development of two new, flexible arts facilities, one with a capacity between 300 and 400 seats and another with a capacity around 750 seats.
- * We believe that the addition of meeting and event capabilities that also support contemporary music will strengthen the project, and we would also encourage continuing discussions with regional educational institutions.



Discussion

Questions

- * Have we fairly described the situation and the opportunities for Nashua?
- * What additional input and information is needed?
- * Are our recommendations in line with your sense of needs?
- * How should we move forward?

