JAZZ.NEXT PROGRAM
Final Evaluation

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Program Evaluator

Jazz.NEXT was designed to encourage new uses of technology in the jazz field. Open to applications from both artists and organizations, the program awarded both planning grants and project execution grants, totaling nearly $900,000 over two separate rounds of competition. The Program was administered by the Mid Atlantic Arts Foundation and funded in its entirety by the Doris Duke Charitable Foundation.

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EXECUTIVE SUMMARY

Jazz.NEXT Program Vision

Direct discussions with awardees and applicants [through MAAF] about Jazz.NEXT indicated strong appreciation for a program that awarded innovation and experimentation over more standard grants for well -established projects. It spurred interest in technical innovation, which clearly needed a boost in the Jazz space, with well over 100 organizations competing for grants. It also extended the interest of entities like Dave Douglas/Greenleaf in applying for foundation support where they might not have otherwise applied for a typical grant. There was some concern expressed that the "usual suspects", (larger well-established institutions) received the grants. However, given the level of sophistication required to design and execute technology solutions effectively, this was to be expected. It was also truer in the first round than the second where smaller organizations and individuals were awarded because of their innovative use of existing and publicly available social networking platforms.

From start to completion of the Jazz.NEXT grant period (2009-2012) social networking really evolved, and became more sophisticated and embedded as a cultural meme. This allowed for more opportunity to use existing platforms in the second round. It also drove home the reality of quickly evolving technologies and issues around donor support of it. Previous reporting noted the weakness in separating IT planning grants from implementation grants due to the speed of both technology adaption and obsolescence.

Another factor that affected program vision in a far less constructive way was the near collapse of the financial system in 2008, just around the time the grant period began. At least two of the ten projects were directly and adversely affected institutionally by a change in the economy during the project cycle. At least two others faced significant financial hurdles to continue with their accomplishments after the fact. Technology implementations have a habit of taking more time as well as resources than originally envisioned, and this occurred with many of the
Jazz.NEXT projects, with most (8) needing more time to complete their projects.

The Jazz.NEXT Program Process

The Mid Atlantic Arts Foundation's (MAAF) Jazz.NEXT program process and execution was well organized and disciplined from the start. It only improved between rounds with a number of modifications that made it function even more smoothly. For example, application judges had an even more streamlined grading and evaluation process in the final round to make decisions. MAAF's well-defined procedures and guidelines drawn from this and other program experiences ensured that instructions to prospective applicants and evaluator's were clear and detailed. MAAF managed expectations from application submission through to selection without being overly burdensome.   The application process encouraged short, concise proposals that focused on the information needed to make funding decisions. It also had well managed ad hoc processes to remediate unforeseen circumstances like potential voting ties.

The four Jazz.NEXT proposal judges participating in the round 2 face to face selection processes were overall positive about the evaluation procedure. As a group they indicated the applications were relatively easy to get through and among the shorter grant proposals they dealt with. They liked their structure and felt the applications contained all the crucial information needed, describing them as succinct, well organized and easy to glean criteria from. The entire process was noted as forcing

applicant evaluators to remain objective. This evaluator would concur with all these insights. The process was quite effective and there is evidence to suggest the most innovative and ready proposers were selected as a result. Evidence also indicates that applicants who were more aggressive in their outreach and willingness to incorporate MAAF feedback and lessons learned from a rejected round 1 proposal were far more likely to be selected in round 2 as the strongest applicant-innovators.

Process Issues of Primary Concern

The dual decision to split the process between planning and implementation grants and the allocation of an upper limit of 75K for project funding (a somewhat low number for technology platform development) had some specific consequences on awardee selection in round 1 and 2. When final choices were limited by the budget as a primary decision criterion, proposal evaluators chose an additional implementation grant over more highly rated planning grants. This despite the fact that it limited the overall number of innovative 'tests' being supported and resulted in disqualifying top planning grants submitted by individuals in round 1. As a result of individuals not being awarded in the first round, an unintended consequence was fewer individuals applying in the second round. The thinking of the first round proposal judges was that because the project was designed to test innovation, IT implementation grants were the more likely than planning grants to fulfill this objective if a limited budget criterion was also applied. The result was that planning grants were given less weight than implementation grants at selection time.

On the proposer side major process issues were related to the difficulty some had navigating the NGO and philanthropic process and the difficulty in reaching out to individual artists based on legal status (*see longer discussion on page 12*).

The Proposers & Proposals

Overall, most proposals were less innovative or cutting edge than originally envisioned, making the winning stand-outs all the more obvious, and in some cases having the potential for broader deployment. The majority of proposal submissions reflected a similar, broad-based and less advanced technical need of sector actors to establish a basic, effective online presence. There was also a clear trend of proposals in round 2 mimicking round 1 winners. In fact, a number of round 2 winning proposals reflected similar first round winners in focus (Berklee, SymphonySpace). Far fewer individual artists applied in round 2, most probably influenced by none being awarded in round 1.

A few interesting trends emerged that distinguished second round from first round grantees:

1. In the first round it was all about innovation through new technology platforms, online sites, mobile apps, etc. In the second, half the awardees (JJA, Berklee and Dave Douglas) were facilitating innovation through the use of their expertise and new workflow processes using existing and public social media platforms in addition to new platforms.

2. While the first round awardees focused on technology for their institutions, all round 2 projects were focusing on training and platforms others could share as a central or supplementary objective (JJA, Symphony Space, Dave Douglas, Berklee, NFCB & MCG).

A trend noted in both rounds was the tendency for platforms and particularly mobile apps to take longer to develop than originally assumed. In both rounds, a fourth round of evaluation reporting, months

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after the stated objectives were due to be completed proved an imperative even for well-managed projects. Technology platforms often take longer to develop then planned. The grant cycle proved relatively short for a full software lifecycle, from design to production, to be completed -- especially for organizations not typically used to managing them. The process from award to actual grant allocation took a bit longer than expected as well, further trimming the implementation time for some as they waited final awarding to proceed. As a result, the awardee evaluations could only determine if an entity finished its project and was on a trajectory for continued success. Unfortunately, determining if it was an *established* success 6 to 12 months after funding completed proved beyond the time scope of the evaluation except in the case of Monterey which was tracked specifically for this purpose (results on page 32). Another trend was that content production was typically the easiest part of the projects to satisfy. Delivering it to new audiences was the hardest either because of the tools or promotional strategies employed.

Jazz.NEXT was designed to find the most innovative technology proposals. However the selection process had the unintended consequence of uncovering two other clear needs in the jazz space:

1) Although a handful of technology innovators exist, the vast majority require remedial support and/or far broader use of the tools created by the innovators.
2) The sector also requires grant writing support and assistance navigating the nonprofit space.

Doris Duke provided extra administrative support to offset the impact of the financial crash. This proved prescient given the difficulties a number of grantees had financially even with this extra support.

Of the 10 projects, 9 completed successfully (two just making it) and 5 have the combined management support, strategic interest and funding to continue past the grant.
- **MCG**[1] did not complete and needs more time and money. It could prove extremely innovative.
- **NFCB** completed, but might have had similar issues to MCG had it not made its Jazz.NEXT objective a more manageable pilot. However, the pilot was quite limited and whether it survives the organization's new strategic direction or has continued funding to proceed is at issue.
- **Walker** completed its objectives.
- **JJA's eyeJAZZ** project completed very successfully although continued financing and long term impact is a serious issue because of organizational funding.
- **Berklee** completed but is now facing institutional funding issues that threaten to slow advances.

The most innovative projects with potential impact on Jazz audience expansion were:
- **NPR** which had the tools, knowhow and funding support to succeed – and used them to best effect leveraging the grant to promote Jazz front and center on its platform to its large audience.
- **JJA eyeJAZZ** which was all about promoting Jazz on a shoestring budget in areas where it was not as ubiquitous using social networking platforms, newly minted grass-roots Jazz reporters and the creation of a complete set of rules and online curriculum to duplicate the process.
- **Dave Douglass** not only for using online platforms and social networking to promote his music but that of other individual artists as well – with a revenue model.
- **MCG** which could revolutionize the logistics of scheduling venues, and mining data to better understand audience behavior, (*if it completes successfully*).

Special note to:

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[1] Subsequent to the completion of this evaluation, MCG completed implementation of the Jazz Commons site.

- **SymphonySpace** which designed a mobile platform not only for itself but is making it available to others with a revenue generation AD component imbedded in it.
- **Berklee Music** for its embrace of the millennial generation and social networking to meet its project objectives and shape the entire project.

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TACTICAL RECOMMENDATIONS FOR FUTURE INITIATIVES

- Consider a program that provides more remedial technology support to the sector as well as one that assist them in navigating the nonprofit space and writing proposals.

- Ensure more cultural diversity in the proposal process as suggested by a round 2 proposal evaluator. The issue was identified as multi-faceted including grant writing help, better outreach to communities of color and insuring innovation addresses multi-cultural inclusivity.

- Given the speed of technology evolution, consider merging planning and implementation grants and have proposers articulate a design process that tests assumptions before implementation begins.

- Given the time and expense to implement technology programs properly consider raising the award allocation to $125,000 and allowing for a 16-18 month grant implementation process. Only a couple of Jazz.NEXT grantees were completed and able to evaluate their projects in a twelve month cycle. Most needed the extended four months the evaluation period provided. Moreover, most ended up receiving more funding from Doris Duke than the original $75K cap in light of the financial crisis.

- Continue to employ the method used to evaluate proposals in round 2 versus round 1. Weaker proposals were eliminated by evaluators reviewing them separately before evaluating the strongest together. This allowed the evaluation process to take less time and move more smoothly.

- As with round 2, select proposal evaluators with broader technology and jazz skill sets instead of employing some proposal evaluators with strong technology skills and others with strong jazz skills. This will avoid the "jazz versus technology" fractionalization evident in round 1.

- Consider further automation of the evaluation process. It was a bit more automated in round 2 with evaluators grading by online survey. Consider an online applications process.

- Consider how to best resolve the following: Round 2 guidelines more clearly qualified/disqualified Individual artists with ties to commercial interests. However, it surfaced another issue; a limited number of individual artists applied and were typically affiliated with LLC's and not non-profits.

- Maintain the Independent financial statement analysis introduced in round 2.

- Consider grading proposals demonstrating intent to share their technology innovation with others higher than those with just implied potential to scale more broadly. Round 2 grantees were distinctly interested in sharing their innovation more broadly and were taking practical steps toward that end in their projects.

- As a result of issues raised in the awardee get-together meetings the foundation may wish to look into some peripheral program support that examines the licensing and generational challenges that technology creates as well as recommending some solutions.

- Suggest considering more proactive ways to promote grantee communication/collaboration *throughout* the project.

STRATEGIC RECOMMENDATIONS FOR CONTINUING IT INNOVATION INITIATIVES

In the event the foundation wishes to continue fostering innovation in this area there are some strong arguments for maintaining a separate and distinct program like Jazz.NEXT in order to do so:

1) The foundation may wish to keep track of field innovators and people who aspire to the leading edge. A unique program like Jazz.NEXT groups them together naturally as applicants. The foundation can see what the most innovative people in this area have in mind even if it doesn't necessarily make a grant to them. Losing also helps these innovators rethink their initiatives – as noted by the high predominance of first round applicants becoming second round awardees.

2) Promoting an innovation program creates a specific set of aspirations and expectations: Applicants must be more innovative, push the envelope and not be afraid to experiment. The message of such a program is that the run of the mill web update or get-me-on-the-social-network grant just won't do – the latter types of requests are what you would expect in a more general grant program. Such proposals for this program were denied.

3) Because the sector is behind in technology, innovators (like Dave Douglas for example) can develop useful tools that help the broader field – and in the process helping those left behind leapfrog using apps and methods developed by others. The foundation could conceivably kill two birds with one stone using an innovation program that also satisfied some remedial needs by developing beneficial tools that others don't have to recreate and insuring they know about them and how to use them.

4) In choosing MAAF, the foundation has selected/developed an extremely competent organization to operationalize this type of program – not an easy task in the IT area. They now have significant experience in running a very well thought out and flexible initiative. Aside from MAAF's very well-honed process, there are a number of indicators that their process did bring the most innovative project to the top.

5) The Jazz.NEXT applicant pool suggests the sector is somewhat bi-polar. Some folks need remedial help, while others are innovators. It's the middle that's a bit mushy. One would expect more run of the mill technical requests in a general grants program.

In any new program, this evaluator would recommend putting more emphasis on innovation sharing – as opposed to making it an option. The round 2 awardees picked up that gauntlet and were far more focused on sharing than their first round counterparts. More support in the area of spreading useful innovation is required particularly for the majority of remedial users that might benefit from these tools.

Finally, a unique element of this initiative is that it brought three distinctive foundation philosophies together in a single cohesive process. Doris Duke supplied the vision, resourcing and context for Jazz.NEXT; MAAF provided a concise, well organized and unbiased system of selecting and evaluating awardees, and this evaluator relied on the Open Society Institute's interactive and iterative process of engaging with grantees during implementation to monitor, evaluate and insure successful completion.

SECTION #1: COMPARATIVE FIRST AND SECOND ROUND PROGRAM ASSESSMENT

Pre-Evaluation Process

The second round of evaluations was as well organized and disciplined as the first with a number of modifications that made the process go even more smoothly. The Mid-Atlantic Arts Foundation's (MAAF) well defined procedures, rules and guidelines drawn from this and other program experience, ensured that instructions to prospective applicants and evaluator's were clear and detailed. Prospective applicants were provided well defined and clear guidelines as to what would be funded. These requirements were culled from 360 degree input from grantors, grantee, evaluator, staff and evaluators. MAAF appropriately managed expectations from application submission through to selection without being overly burdensome. The application questions encouraged short, concise proposals that focused on the information needed to make funding decisions. Application evaluators had an even more streamlined selection, grading and decision making process in round 2.

MAAF also had procedures in place to deal with anomalous situations that arose. For example, when certain applications were rated very highly by one and not the rest of the evaluators, a process to discuss these applications and decide if any should move forward was quickly implemented. When a single low grade by one evaluator affected final selection and funding, a quick huddle between MAAF and Doris Duke staff resulted in an ad hoc procedure that quickly resolved the situation.

Relevant Applicant Pool Statistics: Round 1 & 2 Comparisons

Round 2 and Round 1 applicants at a glance

Applications received: 45 eligible applications versus 93 in round 1.
Implementation grant: 45 versus 53 eligible in round 1.
Dollar Amount: $2.5 million at the July 1, 2010 deadline compared with $4.2 million in round 1.
Organization Applicant: 42 submitted versus 74 organizations (37 implementation props.) in round 1.
Individual Applicant: 3 submitted by individual artists versus 19 (14 implementation props.) in round 1.
States & Jurisdictions: 19 versus 25 in round 1.
Mid-Atlantic Region: The greatest level of participation with 21 applications (versus 55 in round 1).
Midwest Region: 7 versus 11 in round 1.
South Region: 7 versus 8 in round 1.
West Region: 7 versus 14 in round 1.
New England: 3 versus 5 in round 1.

In round 2 only one grant proved ineligible and in round 1 a single planning and two implementation applications were removed from consideration – a very low statistic which underscored the clarity of eligibility instructions. In round 2, far fewer individual artists applied, probably reflecting the fact that first round winners did not include any. As anticipated in both rounds, the majority of applications came from major urban centers with rich jazz communities, particularly New York City. However, these larger centers (DC, NY, CA, PA, etc.) were also responsible for the largest number (vs. %) of applications reductions in round 2. By contrast many of the states that had submitted fewer applications in round 1 still had applicants in round 2. Note too that organizational applicants in both rounds reflected a variety of venues including jazz presenters and festivals, local arts councils, museums, public radio stations, service organizations, and university-based centers for jazz studies, among others. A breakdown of round 2 and round 1applications by state is provided in the table below.

STATE	APPLICATIONS Round 2 & (Round1)	STATE	APPLICATIONS Round 2 & (Round1)
AZ	1 (0)	NC	1 (2)
CA	5 (11)	NJ	4 (5)
CT	1 (2)	NM	1 (1)
DC	2 (7)	NV	0 (1)
FL	1 (1)	NY	11 (27)
GA	1 (2)	OH	2 (3)
IL	3 (3)	PA	4 (10)
IN	0 (1)	TN	2 (1)
LA	2 (2)	VA	0 (2)
MA	1 (2)	VT	1 (1)
MD	0 (3)	WA	0 (1)
MI	0 (1)	WI	1 (0)
MN	0 (2)	WV	0 (1)
MO	1 (1)		

Round 2 was notable for the number of resubmitted proposals and the high number resubmissions that succeeded in getting awards. Of the 45 applications about one third (16) of the round 2 applicants were resubmissions, about one third (5) of the group that reapplied received grants resulting in over 83% the round 2 awardees being round 1 applicants. Two-thirds (4) of round 2 winners had were not successful in the first round selection process while 16% (1) of had benefitted from a round 1 planning grant, (See the planning grant discussion below).

Analyzing the number of "re-applicants" that became round 2 awards versus the number that eventually were awarded planning *and* implementation grants -- it appears that the two round process combined with iterative support by MAAF was a better (more cost effective?) tool in appropriately preparing a larger group of applicants for eventual support than planning grants. Of the six awardees in round 2 only one was a round 1 planning grant while three were applicants form round 1 who sought feedback from MAAF before reapplying with more substantive proposals. Another awardee was a round 1 applicant who took its cue from the winning Savannah grant and submitted a fully redesigned proposal similar to it. *Only a single round 2 awardee was a completely new applicant*. In fact, the common profile among the sixteen round 1 re-applicants was that *most sought feedback from MAAF after round 1*.

General Profile of the Applications

Overall, proposals continued to be less innovative or cutting edge than originally envisioned, making the stand-outs all the more obvious. The majority of submissions reflected similar, broad-based and less advanced technological needs of the Jazz sector (e.g. establishing a basic, effective online presence). However, in this round more understanding of social networking and the application of already developed technology tools from "the cloud" were in evidence. This reflected a natural evolution in understanding as technologies become more mature and mainstream.

A rather common behavior in granting was evident with round 2 applicants. Having seen the winning proposals the first round produced, many new applicants tended to mirror that initial pool, submitting applications that were more reflective of first round awardees than they were uniquely innovative

(Berklee, SymphonySpace). From the point of view of testing innovation to see if it wasn't just a fluke, this redundancy was more beneficial than not, particularly as the more redundant proposals reflected trends (social networking, mobile) described by a futurist as necessary for the Jazz field. The other four round 2 awardees reflected entirely new proposals. It's interesting to note that a number of similar projects were selected in both cycles despite all but one of the evaluators being different.

More institutions submitted proposals that individual artists in round 2. This also mimicked the results first round awardees, which *were all institutions*. As indicated above, some first round proposers that resubmitted for round 2 took a different route, engaging MAAF to better understand why their proposals had not been successful and how they could make them more competitive. This evaluator feels such efforts were reflective of the iterative feedback approach the Jazz.NEXT granting process sought to foster, and was a net positive. The results seem to indicate that applicants more aggressive in their outreach and willing to incorporate feedback were selected in round 2 as the strongest innovators by an independent panel of judges. Any feedback provided by MAAF was independent of the decisions of application evaluators, most of whom were new to the process.

Although Jazz.NEXT was designed to find the most innovative technology proposals, the round 2 process, like the first, also uncovered two other clear trends in the jazz space:

1) **While a handful of technology innovators exist, the vast majority require remedial support:** The nature of many applications received and proposed as innovative clearly demonstrate that the entire sector would benefit from more remedial technology grant initiatives. Initiatives to help them better understand and deploy existing online, and particularly, web 2.0 social networking technologies.

   Technological innovation is important but it will have limited scaling effect if most in the sector are not at a level where they can understand or utilize it. Even the process of selection for this innovative program was done quite manually, with limited technical support – and some of the more Jazz-centric proposal evaluators indicated they preferred it this way. Technological innovation is difficult to promote if not practiced. At least to in the case of social networking technology, this knowledge is becoming more ubiquitous as more people use it (Facebook has over 800 million users).

   The nonprofit technology sector has identified a three stage pyramid to describe the level of technical expertise in various issue areas.

The bottom of the pyramid reflects the need for a comfort level and expertise with basic technology. The proposals seem to indicate that the Jazz sector (and many smaller nonprofits) is still at this level. The next level is the ability to use ICT effectively for administrative purposes and service delivery throughout an entity. Typically medium to larger nonprofits that combine both budgets and interest achieve this level. The final level at the top of the pyramid is reserved for cutting edge and innovative use of ICT. In fact, few organizations in the entire nonprofit sector have achieved this level. Some sectors like environment, health and education lead while others, for example Human Rights, lag behind. The innovation pinnacle is typically limited to larger organizations with larger budgets and vision – not surprisingly the overwhelming profile of the entities finally selected for the first round of Jazz.NEXT grants – despite the far broader applicant pool of individuals and entities.

2) **There is a need for support in grant writing, navigating the nonprofit process and reaching out to individual artists:** This need was also identified by one of the application evaluators, (see diversity discussion below) and articulated by MAAF as well. Jazz's roots in the commercial music world have been of less benefit to the form and its lost ground to so-called "popular music". Aside from dwindling commercial sales and venues in which to perform, Jazz has not made the transition into non-profit cultural venues (and forms of support) in as successful and well-structured a way as other forms of traditional music (chamber, orchestral, etc.), which, like Jazz have also lost ground to popular music. Part of the problem of not being comfortable in the NGO space is reflected in the many poorly conceived applications for grants received and the difficulty many had navigating the proposal process. Both rounds highlighted a fractious community, with many doing the same thing and not necessarily communicating or collaborating with each other.

The number of individual artists incorporated or associated with LLC's versus non-profits presented its own unique limitations both for the artists and MAAF. The variety of commercial partnerships presented a challenge for MAAF; how wide should it open the process to these grantees? If Greenleaf was a viable candidate, why not EMI? Consequently, MAAF allowed interested commercial entities to apply in collaboration with eligible nonprofit partners. However, these associations proved less common for individual Jazz artists, and were reflected in the limited number of individual applicants. Providing an ability to integrate more successfully in the nonprofit space may also lead to enhancing the commercial viability of Jazz. World music's experience in the non-profit space presents a potentially successful paradigm to emulate. It has used it as well as non-profit festival and concert venues to grow and evolve – and in the process has become more commercially viable.

Evaluation Process & Methodology

The nature of the application process did identify a handful of standout innovators. Indications are that the focused Jazz.NEXT program guidelines and selection process helped them rise to the top. MAAF conducted a conference call with the pre-screening panel to explain program goals, review criteria and procedures. It also provided the pre-screeners with information on the size of grant awards and the limited number of applications that could expect to receive funding through the second round of the program. In round 2 the pre-screening panel was asked to submit their scores electronically. MAAF decided to utilize the 1-4-10 scoring model that Doris Duke had recommended for pre-screening. The readers were instructed to review and score independently and not to communicate with each other during this process. MAAF did not want to have discussions take place unless all the reviewers would be

privy to the conversations. Pre-screeners were instructed to assess the applications against the review criteria *and only the review criteria* and to contact Sara Donnelly at MAAF if they had questions.

As evidence of the success of this methodology Round 1 awardees like NPR and Monterey have already returned strong results. Media futurist Gerd Leonhard*, author of *the Future of Music,* identified a number of strategies to more effectively promote Jazz online that precisely mirrored some of the first round proposals selected. A couple of first round projects were strong enough to compete in the Doris Duke Foundation's continuing innovation grant competition. Finally, first round choice NPR has gotten some favorable press[2] regarding its innovative online Jazz presence in large part instigated by Jazz.NEXT support. Even for the recently completed second round projects the eyeJAZZ initiative has already resulted in some applicants having their pieces sold and one creating a business from what was learned.

Evaluator Debriefing

In post-analysis, the four Jazz.NEXT evaluators participating in the face to face selection process[3] were quite positive about the evaluation procedure. In group discussion they indicated the applications were relatively easy to get through and were among the shorter grant proposals they dealt with. They applauded their structure and felt they received all the crucial information they needed in the applications. They described them as succinct, well organized and easy to glean criteria from. From his own firsthand experience, this evaluator would concur with these insights.

On the modified two phase scoring process in round 2 (discussed further below) the only evaluator that served on both round panels] originally voiced concern that it might not be as effective as discussing all proposals in group. However, s/he indicated s/he was quickly won over by the effectiveness of the process. She and others felt that the ability to discuss disqualified individual proposals which had received high scores from one and not other judges proved helpful in maintaining fairness and alleviating any concerns about first phase evaluations that were not done in group. The entire process was noted by the panelists as forcing them to remain objective.

Round 2 Application Selection Process: Important Changes of Note

Final Applicant Selection Process

The most innovative modification of the process was the method used to evaluate proposals. First, a larger team of six evaluators reviewed and graded the entire corpus of 45 proposals and weeded out the weaker ones before a smaller group of four evaluators came together to review the strongest selected. Thanks to these changes, the final face to face evaluation process took less time and went more smoothly than it did in round 1. The final review was accomplished over a single day (versus 2 in the first round). There was significant time to discuss the overall process and not feel pressed for time by the sheer volume of proposals of vastly different quality to review. Appreciating there were double the amount of proposals in the first round, weeding out the weaker proposals before coming together still significantly speeded the overall process, allowing more time to discuss the best proposals instead of

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[2] http://www.nytimes.com/2010/06/24/arts/television/24npr.html
[3] Greg Carroll, CEO, of the American Jazz Museum in Kansas City. Rainbow Robert, Manager, Artistic Programming, Coastal Jazz & Blues Society / Artistic Director Vancouver International Jazz Festival, Molly Sheridan Director of the American Music Center's CountersreamRadio.org, Jacob Yarrow, Programming Director, University of Iowa's Hancher Auditorium.

allocating the same amount of time for each proposal, however good or bad it was. The evaluators all felt the process rigorous and fair and were satisfied with the result -- with the caveat of finding a better way to foster more diversity in the proposer pool and cultural competence (see discussion below).

In round 2, the diversity of judges also seemed to better mesh. There was no factionalizing of the technologists versus the artists as in round 1. Overall, the judges seemed more comfortable with *both* technology and Jazz.

Automating the Evaluation Process

Although Jazz.NEXT deals with innovative technology, even some of the evaluators eschewed online proposal evaluation. A show of hands this year and last indicated that judges are still split on receiving and reviewing proposals online versus off. MAAF indicated similar sentiments from evaluators in its other programs. However, per suggestion after last year's round year, the judges used an online survey form to rate proposals, affording MAAF an easier time to aggregate results.

Self-partnering, Eligibility and Individual Applicants

In the Round 1 submission process a case came up of an individual artist also affiliated with/owning a private company. The artist was allowed to apply as an individual even though his alternative corporate identity was deemed ineligible. The intent of the Jazz.NEXT initiative was to ensure jazz/music-related companies did not take advantage of a loophole by having staff who were jazz artists apply for grants as individuals acting as corporate proxies. In round 2, the guidelines were modified to take this issue into consideration, disqualifying those with such a conflict unless affiliated with a qualifying third party.

Clarifying what Constitutes Valid Innovation

In round 1, evaluators were confused by the review criteria: "Centrality of innovative approaches to new technologies to the project". They defined it to mean the actual use of new technologies in the proposal versus the ability to research or analyzing how innovative technologies could affect the field in order to inform it. MAAF staff indicated they defined the criteria to mean both; actual use as well as informing the field. The definition was clarified for round 2 evaluators before judging proposals. A case could be made that the Jazz Journalist Association Awardee in round 2 directly benefitted from this clarification.

Financial Statement Inclusion

This innovation proved quite useful, adding another dimension to the evaluation process. Judges now had access to separate reports from experts rating the applicants on their financial viability. Despite concerns noted on one application by the Jazz Journalists Association, it nevertheless had a proposal compelling enough to be awarded in round 2.

Elimination of 'Catch Phrases'
In order to encourage innovative thinking, wording was also discarded in the round 2 application process that applicants tended to regurgitate back with little understanding of their meaning evident.

Round 1 Applicants/Round 2 Awardees

Due to the significant number of first round applicants that became second round awardees, this evaluator took the opportunity to ask round 2 recipients what steps they had taken between round 1 and round 2 to modify their grant, get feedback or make it more competitive:

- The Jazz Journalists Association noted MAAF helped them clarify a portion of their proposal that had hung up round 1 evaluators because it had elicited more questions and assumptions than it clarified around mentoring new or seasoned journalists.
- The individual grant recipient, Dave Douglas, noted that the rules of partnership with organizational entities had been clarified significantly in the second round making it easier and more straightforward to apply. He also indicated that the evolution of technology over the year had helped simplify doing what he was proposing, underscoring the fast evolving nature of technology and is impact on planning and implementation over a 2 cycle grant.
- Berklee decided to request Jazz.NEXT funding for a different project in the round 2 because the High School Jazz Festival website initiative was considered to be a stronger project and a higher priority for the college. Berklee did not seek constructive feedback from the Mid-Atlantic Arts Foundation, but the unsuccessful round 1 proposal was useful in that it prompted an internal review of projects that would better fit the Jazz.NEXT program and would be in keeping with the college's own goals and mission. *Perhaps not surprisingly, the Berklee project chosen for the round 2 is most similar to that of round 1 awardee Savannah Music.*
- One awardee noted some frustration in the Jazz community that while the awards had been originally promoted as helping artists, only larger institutional players (the typical grant recipients) had succeeded in the first round. This sentiment was echoed by one of the small organizational awardees that registered actual surprise at having been selected along with big institutional players, but that was equally unsurprised they had not been selected over larger institutional players in round 1.

Ironically the nature of the Jazz.NEXT initiative allowed for smaller entities with very innovative ideas and a good grasp of social networking[4] to compete – while at the same time favoring larger institutional players with the organization and technical expertise to manage large complicated technology projects. To this extent the selection of the large institutional players in round 1 followed by smaller players in round 2 may have been somewhat inevitable given the very competitive selection process. However given that the individual awardee and the smaller scale Journalist organization both scored very highly in the round 1 as well, it is important to appreciate how the planning grant financing and restricted overall budget funding influenced round 1 evaluator choices as well.

The NFCB did indicate that the planning grant process had been useful for them. Their original assumption was that the priority of affiliated stations was a shareable jazz music database. The process allowed them to determine what the real need was – a metadata library contextualizing the music that was being played on the various stations with the music database being secondary.

Future Issues to Address

While this section challenges and critiques certain aspects of the Jazz.NEXT initiative, the overall process was quite impressive and organized, leading to the most innovative projects being chosen. The concerns

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[4] sophisticated technology allowing for cheap distribution

expressed should be construed as recommendations to make a good initiative better, rather than remediating a poorly conceived process.

Further Automating the Application Process[5]

Appreciating the split feelings on this issue, in addition to automated grading, having the proposals available online for those who preferred it might be a useful option. To limit over-burdensome administration, allowing prospective applicants to fill out the relatively short applications online would insure that applications were already in digital form, (versus scanning proposals in after the fact). Any system designed for such a purpose for one program could be used in others as well. A manual system might be required to receive supporting material unless attachments were solicited in digital form too.

Grantor's responding to Awardees during the Implementation Phase

The iterative feedback process during implementation has been a learning experience for all. It was agreed at the start of the process that in order to retain objectivity as a program evaluator, feedback would be solicited from awardees while interviewing them, but their suggestions and questions would be fed back to the grantors rather than this evaluator acting upon them. In order to make awardees comfortable and trusting of the process, it was important that once feedback was solicited that it be responded to by the grantor. Awardees are often hesitant to "pester" their benefactors with questions directly, fearing it might impact their chances for future grants.

There was some initial hesitancy on the part of MAAF in responding back to the awardees in this manner during the implementation process, and the evaluator had to follow up to insure it occurred for round 1 recipients. It took some time to adapt to an approach that runs counter to deeply held philosophies in traditional philanthropy to stay objective and not interfere in the grant implementation process. After discussing it with MAAF, the situation improved and this evaluator made sure before each new report solicitation cycle that previous concerns or questions were addressed. In round 2 this evaluator employed a different tact, instead of actively asking if grantees had particular questions for the grantors, passively determining in the course of quarterly interviews if they did. When this method was employed, far fewer questions came up. Grantees typically want to know if more funds are available, so they were instructed to focus on other concerns when soliciting donor feedback. The questions were more varied, but some inevitably asked the funding question in a less direct way.

In Round 2 this evaluator did connect a number of grantees directly with each other when it was clear one had the potential solution to the other's problem and that delay's might affect final implementation, (at this time some personnel transitions were occurring at MAAF related to front-line responders for the program). This evaluator recommends facilitating more grantor to grantee / grantee to grantee cooperation and communication as part of program activities for a future grant in line with the two get-together meetings that were part of this grant specifically to foster more cooperation. This was recommended by a few of the awardees as well.

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[5] MAAF has moved to all-electronic applications for most of its program since Jazz.NEXT and is moving to do so for the remainder of its programs. Even work-samples and attachment materials are uploaded to the online application.

Individual Artist Eligibility requirements

The grants focused on non-profit eligibility and more innovative 501c3 *institutions* did apply and rise to the top for consideration. On the other hand, many individual Jazz performers who create [or affiliate with] institutional structures typically do so with LLC's rather than 501c3's. The guidelines had restrictions on private sector applicants that *may* have discouraged individual artists although it's not clear if carving out allowances for individual Artist LLC's would have resulted in more innovative proposals. Given this more common affiliation in the Jazz sector, consideration might be given to broadening the pool by modifying the rules to allow LLC applicants, even if unaffiliated with a nonprofit.

Budget Funding for Success

The limited budget spurred a lively discussion among evaluators in round 1 whom suggested skimming a small portion ($5,000) off the top of budget allocations for each individual awardee in order to fund an additional planning grant. This solution was pointed out to have negative consequences on two levels:

1)   A foundation asking for a realistic budget from a proposer and not fully funding it.
2)   Funding available for individual technology projects was perceived as already very [or too] low.

The conversation pointed up the contentious issues between the amounts available in the Jazz.NEXT grant budget versus the true costs of implementing viable technology initiatives in a timely manner.

In the second round, there was a need to support a reasonable amount of projects to be able to effectively evaluate a variety of innovative approaches. Consequently six were chosen with the total awarded amount slightly exceeding the award budget. As a result, each awarded proposal did end up receiving slightly less than requested for their *program* (institutional grantees received 96% of their program awards in round 2).

The Doris Duke Foundation alleviated this situation in two ways. It awarded a special percentage (totaling 31%) for general administration above the grant amount in consideration of the especially difficult circumstances the current recession has had on grantees in the arts to meet their general support needs. This had the effect of institutional (but not individual) awardees receiving more than their overall program request to support general capacity. MAAF balanced this by providing the single individual donor in the second round the full grant and reducing overall admin support for the remaining institutional grantees by one percent to 30%). The Doris Duke Foundation also allowed Jazz.NEXT grantees in the first round to compete with grantees from its other programs for extension grants of considerably more ($125,000) than the maximum Jazz.NEXT awards ($75,000) -- and NPR was awarded.

Technology support is rarely "a cheap date" and this evaluator recommends considering a higher grant award for future technology initiatives similar to this one. A more realistic amount would be 100K-150K for a pilot, taking the costs of equipment and personnel into consideration.

Providing Enough Time to Implement

Related to the financial resource requirements, it became clear during the course of both rounds that

the majority of awardees needed more time to complete their projects. Unforeseen technical issues (probably due to awardee inexperience with these types of projects) occurred in many cases, delaying completion. Most underestimated the requirements for building mobile applications and then getting them approved by the Apple and Android mobile platforms. A 16-18 month grant implementation cycle is recommended for these technical projects rather than 12, particularly if time between approval and funding takes a couple of months to occur. While it is true that projects like EyeJAZZ can complete in less time if they make use of existing platforms, the overwhelming majority of projects were building their own platforms, and that takes more time. Integrating the planning, design and testing process with the implementation process into one grant cycle rather than splitting the planning and implementation grants, also suggests a longer timeline makes more sense.

Planning versus Implementation Grants

As indicated previously, this evaluator had some concerns with splitting the first round between planning and implementation grants for a number of reasons:

1) Technology grants better lend themselves to implementation support with planning as a part of the inevitable design process. Because technology evolves so quickly, supporting a planning grant in one year and an implementation grant in the next or subsequent years may well result in having to re-plan the entire process by the time implementation occurs.

2) Limited funding was available for both the Jazz.NEXT program's planning and implementation grants. As a result, maximum implementation grant amounts were lower than this evaluator would have recommended. The planning grant support might have been better used to increasing the size of those grants or to support more implementation grants.

3) In their deliberations, evaluators in round 1 made a clear value judgment as to which type of grant was more relevant for this innovation program. When budget limitations required a choice be made between evaluation and implementation applications that had scored highest in each category, they supported "A bird in the hand over 2 in the bush" strategy. Specifically, they chose one more expensive implementation grant over the support of a number of planning grants. This had some interesting unintended consequences. Firstly, a more highly rated planning grant submitted by an individual artist had to be denied in favor of a slightly lower scored implementation grant in order for the latter to be awarded. As a result, no individual artists won round 1 support. Indicators in round 2 suggest many applicants took their cue from first round awardees. The lack of individual artist awardees in round 1 appears to have impacted individual artists applying for round 2. While the percentage of organization applying for round 2 was in line with last year as a ratio of organizations to total grants, *individual artist applications were more than three times lower than expected (3 versus 19).*

If there is no planning grant process for technology grants what is the viable alternative?

1) Simply include the design/planning phase in technology grants and raise the support level as indicted previously.

2) Given the applicant and awardee statistics presented above, another possibility is to continue with a two round process that allows rejected applicants in the first round to get useful feedback and reapply. At least for the Jazz.NEXT program, four times more round 2 applicant winners benefitted from being rejected in round 1 and reapplying than the one organization that did receive planning support and subsequently won in the round 2. A majority of the sixteen projects the judges recommended in round 2 were rejected first round applicants who had asked for feedback and advice from MAAF. An iterative 2 round process seemed to have a rather dramatic effect strengthening rejected first round proposals.

Diversity of Proposals and the Proposal Process

In conversations to improve the program one of the judges, indicated the need to insure more cultural diversity in the proposal submission and evaluation process. S/he wasn't sure how this might be accomplished, but the issue seemed to multi-faceted. S/he discussed the benefit s/he personally felt being part of the panel as a judge in understanding how to better apply and what criteria were evaluated. This raises the question if similar auditing opportunities are possible (e.g. sitting in as an observer). Some aspects of this issue seemed easier to address in the context of a Jazz.NEXT initiative. Others lent themselves to more remedial programs like those discussed above for technology or initiatives that focus specifically on grant writing and artists navigating the non-profit space:

1) Some applicants of color need help writing better grants.
2) Some venues may be better at communicating these opportunities to communities of color.
3) The notion of innovation as defined by the program should addresses multi-cultural inclusivity.

Please note that the six evaluator/judges did meet MAAF requirements that included jazz and technology backgrounds, as well as a variety of diversity criteria (gender, geography, race, etc.).
Potential versus Intent

Based on the instructions to application evaluators, a technically innovative proposal could still receive the highest grade based on the *implied potential* for the idea to scale – even if the proposal did not make a point of dissemination more widely than the specific audience it was designed to benefit. The logic behind this was that scaling an idea might require another grant beyond the current focus of the program, and the foundations took the responsibility of disseminating best practices more widely if the ideas proved innovative. MAAF felt the judges would correct for this concern, rating proposals that demonstrate potential and intent higher than those that simply imply potential. Nevertheless, this evaluator felt the grading standard conflicted with the instructions provided to applicants on one of only a handful of criteria proposals were ultimately judged on:

'Potential for the implementation project to impact a broader constituency through replication in part or whole by other jazz artists/organizations'

This criterion implicitly, if not explicitly, invites applicants to *demonstrate* broader potential rather than just imply it. Providing instruction for evaluators to grade *higher* for those who actively demonstrate potential seems more appropriate to an initiative whose objective is to promote and extend innovation. We all know that the savviest grant writers read the criteria and try to respond to all of them. Given the mediocre quality of the overall proposal pool, it is more likely that applicants that did not explicitly emphasize broader dissemination overlooked the need entirely, rather than purposefully relying on a

strong proposal to imply it. Given this and that so many other grading and evaluation instructions were clearly articulated, this evaluator feels that judges should have been instructed to grade proposers who *explicitly* defined a broader dissemination strategy higher rather than relying on an implied assumption.

Even if applicants are resource-constrained in disseminating ideas beyond their organizations, an articulated vision of doing so denotes a larger world view then simply benefitting their own organization -- and a potentially better foundation partner to do so, and help others in the field. Finally, in discussions to improve the program after the process had completed, the judges noted the importance of proposals with collaboration built into them raising the bar for the entire sector.

Post Mortem versus Formative Evaluation Reporting

As the result of a reporting mix up one grantee organization inadvertently sent their MAAF final evaluation report to this evaluator instead of the quarterly formative evaluation report for the end of the grant. Reading the report what stood out was how these final one-time post-grant evaluations can be written to ignore most of the issues an entity is having and positively spin the result while still answering all questions legitimately. These are far more difficult to cover up in a quarterly evaluation format when the grant is in progress. This is not a slight of the MAAF end-of-grant evaluation report that, typical of the organization, was quite thorough. It's just a systemic limitation of this type of post-mortem grant reporting where the grantee can spin the results quite positively while proving little. The organization was able to answer the MAAF questions credibly and positively spin the 11th hour creation of its applications without alluding to the fact that it had yet to have been deployed or collected any significant user uptake or support when the report was produced. Formative evaluation is particularly useful augmenting end of grant reporting for experimental grant-making where historical experience is less available to infer a grantee's real situation and some intervention during implementation is helpful.

Awardee Meetings

MAAF hosted two meetings in round 1 and 2 respectively that framed the salient issues being addressed by the Jazz.NEXT awardees. The meeting for first round awardees took place in the middle of their implementations. It was primarily a presentation made by futurist Gerd Leonhard with some Q&A and participant experience-sharing. Two significant points Gerd made related to the Jazz.NEXT grants was that there was a need for a both a flagship or breakthrough platform for Jazz online and mobile applications to allow it to become more viral and ubiquitous. A number of the grants chosen in the first round had these specific objectives -- *underscoring that the selection process had appropriately chosen and matched projects to the actual trends needing to be addressed.*

If the theme of the first convening of Jazz.NEXT grantees was about defining the major innovation trends for the sector, the theme of the second was discussing what was known about operationalizing around them. This seemed a natural and appropriate evolution. In the first round much was unknown; the meeting took place in the context of burgeoning social networking and mobile trends and the original four Jazz.NEXT grantees were still working through their projects. In the round 2 meeting there were already clear winners in the social networking technology space (Facebook, YouTube, Twitter, etc...), as Jeb Carlson of ReverbNation pointed out. More importantly, there were four fully mature Jazz.NEXT projects at the table to share their experience with the second round awardees, who were themselves in the midst of their implementations. Also unlike the first round, which was primarily a compelling presentation by a futurist with associated Q&A round 2's meeting was far more interactive. Participants

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and speaker Jeb shared nuts and bolts issues surrounding implementation, branding, income generation models, budgeting, metrics, etc…   Topics of priority interest that emerged included:

Adaptation: A reasonable amount of any technology project budget must be allocated for the inevitable changes required to stave off obsolescence and maintain relevance in a fast changing environment.

Build versus Buy: The uber-trend in computing is for software to be delivered as service by a third party in a so-called cloud. There are a number of issues associated with this new trend:
- *Landlord rules:* Using third party platforms effectively often requires adapting organizational workflow to a more generalized standard. While users/customers have some say, the platform owner or "landlord" can also change the rules (like privacy) at its discretion.
- Institutions with the budget, staff and branding to develop their own platforms (like NPR or Dave Douglas for his label) will and should continue to exist. However the balance between the levels at which it's appropriate to build versus adapting to a third party platform will continue to be tested, particularly in the nonprofit environment where budgets are typically tight.

Sustainability: An uber-model for sustainability (like traditional corporate sponsorships and product advertising for network television or advertising and classifieds for print media) has not been found in the online world. However, one can point to venues *that do* make money, like ReverbNation, Facebook, YouTube, Huffington Post, etc… The successful models often use a formula of providing free intellectual property (e.g. digital content) in exchange for promoting/selling some tangible good/service, (tickets, t-shirts, access to artist) etc..

Another sustainability model involves offering "Freemium" services -- Providing a significant share of intellectual property for free but more premium value-added services to a narrower audience at a price that covers the free services offered; Offering paid services like detailed metrics that help users position and sell their goods more effectively; Offering paid services at small incremental pricing and collecting revenue on volume purchases of said services.

Understanding New Audience Demand: A number of attendees brought up the high costs of creating quality digital content only to find their audience consuming their lower end media on YouTube. This underscores a generational difference of expectation in products and services that producers creating digital products need to be sensitive to. The younger generation is far more interested in mobile, 24/7 easily accessible content and is far more willing to sacrifice some quality to get it.

Employing the Younger Generation to Develop Effective Online Strategies Following on the last point, the younger generation uses this technology differently. Social networking is part of its communication and collaboration DNA. The new generation has different notions of privacy living in a culture where the convenience of the *consumer* often trumps the protection of the *citizen*. *This trending is irreversible –* meaning they will inevitably outlive and replace the older generation with their cultural memes and will in turn be replaced by those of their kids. While the older generation can try to impart wisdom to the younger and continue to satisfy its similarly aged contemporaries with goods and services more appropriate to their sensibilities, it is incumbent on those trying to reach a younger audience *to satisfy their sensibilities rather than seeking to change them to the older generation's habits.* This is best done by employing, listening to and understanding the habits of this new generation. Also appreciate that this generation is influencing the way its parents and grandparents change *their habits* in relation to the new technology in order to communicate with the younger generation.

Topics of Importance Raised in Participant Discussions

- Generational difference among artists included younger artists more comfortable sharing their content than older artists.
- Licensing issues and copyright permissions was still a significant issue, as it was in the first meeting. Clip background music, compensation and how clips were used were all discussed.
- The issue of equipment, storage, bandwidth and peripheral device expense was raised related to ongoing maintenance and support of whatever platforms were developed through the grants.
- A number of the ten grantees struggled with financial issues during the grant cycle including Walker, NFCB and JJA (which simply has limited funding).
- There was a brief discussion of the Library of Congress having 13 million dollars cut from its budget and affecting NFCB's potential access to METADATA. However a broader discussion of the effects of limited State and Federal funding in future were not addressed.

The issues of both licensing challenges and increasingly large generational differences were particularly salient because Doris Duke may be unintentionally exacerbating them simply by making these important, innovative and necessary technology grants. *Consequently, the foundation may wish to look into some peripheral program support and research that examines the licensing and generational challenges the technology creates as well as recommending some solutions.*

Grant Process Summary

As manual as the process was, it's fair to say this evaluator is impressed with the overall efficiency and organization of it in both rounds, and feels that the strongest and most innovative proposals from non-profit entities did rise to the top in the selection process. MAAF was fastidious in soliciting input from the grantor, grantees, evaluator and judges to improve upon on its process. Having worked with institutions less diligent in protecting against these issues, this evaluator was also particularly impressed by the level of MAAF's effort to guard against conflict of interest and self-dealing issues in its procedures and instructions to insure consistency and fairness. The awardee get-together meetings and presenters in both rounds struck the right tone with the first meeting framing the parameters newly minted Jazz.NEXT projects needed to aspire to increase audience and the second focusing on nuts and bolts issues with seasoned first round Jazz.NEXT projects providing insight and sharing ideas with the new round of awardees. *The program would have benefitted from more of these interchanges.*

The process was in fact so well done that this evaluator would recommend using MAAF for similar competitions now that it has the experience with the subject matter, combined with its well structured methodologies and implementation procedures. MAAF didn't sit on its laurels from after round 1 and simply role out the same process. It listened to input and refined it in order to make it even better. The best compliment this evaluator can give to the process is that he would deploy it himself if the opportunity arose.

Finally, a unique element of this initiative is that it brought three distinctive foundation philosophies together in a single cohesive process. Doris Duke supplied the vision, resourcing and context for Jazz.NEXT; MAAF provided a concise, well organized and unbiased system of selecting and evaluating awardees, and this evaluator relied on the Open Society Institute's interactive and iterative process of engaging with grantees during implementation to monitor, evaluate and insure successful completion.

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SECTION #2: THE AWARDEES

Proposer and Proposal Analysis

A few rather interesting trends emerged distinguishing second round from first round grantees:

- In the first round it was all about innovation through new technology platforms, online sites, mobile apps, etc... In the second, half the awardees were facilitating innovation using a combination of their expertise and new workflow processes and *existing* social media platforms:
  - o Jazz Journalists provided training, expertise and facilitating community using existing webinar and social media platforms.
  - o Berklee Music used a revamped website, existing social media tools and community building to engage students in innovative ways.
  - o Dave Douglas used a combination of existing and new platforms as well as a new business model and original content to engage his audience online.

- While the first round awardees tended to focus on technology for their institutions, all second round projects were focused on training and platforms others could share as a central or supplementary focus of their objectives. These include the Dave Douglas open source web platform for other artists; Symphony Space providing and training B2B promoters to use its mobile apps for free; JJA offering training and courseware to others; MCG aggregating existing data for the community; Berklee to create a cyber-association of high school jazz instructors, and NCFB for public broadcasting Jazz Radio Stations.

One similar trend noted in both rounds was the tendency for platforms and particularly mobile apps to take longer to develop than originally assumed, Symphony Space, Dave Douglas, NFCB, MCG and Berklee all had similar issues discussed in more detail below. Another was that content creation was uniformly the easiest parts of the project to execute across awardees, whereas processing and distributing it and generating larger audience proved the harder technical challenges.

For most projects, first and second round of Jazz.NEXT grants inclusive, a fourth round of reporting months after the stated objectives were *due* to be completed was an imperative even for well-managed projects. Technology platforms often take longer to develop than planned and the grant cycle proved relatively short for a full sophisticated software lifecycle, from design to production, to be completed, especially for organizations not typically used to managing them.

Previous reporting noted the weakness in separating IT planning grants from implementation grants related to potential project obsolescence and impact on overall project selection. Clearly grantees need more realistic project planning, but it should be integrated in an implementation grant as part of an articulated design process where awardees can test assumptions in a timely manner before implementation begins to better judge time and resources required to implement.

Individual Awardee Discussion
Evaluator's note: Listing projects alphabetically or by round was infeasible due to the preferred methodology of comparing projects that were similar in the first and second rounds. Therefore the projects are presented in roughly the order of success and innovation with the strongest projects presented first and the weakest at the end.

National Public Radio (NPR)
"NPR is significantly building our jazz offerings, using the capacity of NPR Music to forward jazz appreciation, education and innovation. The website is evolving, with new iterations that better utilize modern technologies to communicate the live experience, engage an active audience and create an ecosystem that is exciting, lively and in tune with technology"

NPR used the Jazz.NEXT grant to create the type of rich interactive platform Gerd Leonhard's referred to in his discussion with the grantees. In a number of respects NPR Music had a significant advantage in this evaluation/reporting regime because it operates a tech savvy virtual venue with a large staff; has sophisticated marketing and reach; has a dedicated national audience already; has easily accessible log files of objective metrics; and experience with these types of grants and reporting. That being said, throughout the project it leveraged these assets to the maximum extent. Based on NPR's performance, the grantor should have a high degree of confidence that it can deliver on its vision of using technology to effectively promote Jazz and build audiences. For sheer reach this grant was unparalleled.

Relevant NPR Statistics:
- More than 500 entries were made to *A Blog Supreme.*
- More than 600 other rich features posted online.
- 175 lively jazz concerts for listening or downloading.
- 86 dynamic artist interviews and profiles.
- 66 themed listening lists as part of the "Take Five: A Weekly Jazz Sampler" series.
- 47 new album reviews, made available at *npr.org/music* with photos and audio extras.
- 15 jazz albums previewed in the First Listen series, offering audio streams for a week before their release in stores, with a review by NPR editors.
- 6 jazz Tiny Desk Concerts presented with video, including Esperanza Spalding which has attracted nearly 30,000 page views.
- 188,000+ unique visitors per month to jazz.
- 1.68 million+ page views to jazz over four months.
- 330,000+ page views to the Village Vanguard concert series. Three percent of Web visits to the Vanguard series resulted in clicks to other features on npr.org/jazz.
- Almost 4,000 total followers to the Blog Supreme Twitter feed—up more than 100%.
- 22,000+ total subscriptions to the Jazz Notes newsletter, an increase of more than 7,000 subscriptions during the grant period.
- Throughout the grant period, NPR's jazz content received *more than 7.2 million page views.*
- NPR Music's "50 Favorite Albums of 2010" included 7 jazz albums, attracting 1.1 million page views.
- *NPR Music* received more than *68 million page views*; it was busiest in *December '10*, entertaining more than *eight million page views* during that month alone.

Relevant NPR links:
http://www.npr.org/music/genres/jazz-blues/
http://www.npr.org/blogs/ablogsupreme/
http://www.npr.org/series/90611896/live-at-the-village-vanguard
http://www.npr.org/series/newport-jazz-festival/?ps=sa

Jazz Journalists (eyeJAZZ)

"The eyeJAZZ Training Program will equip up to 30 jazz journalists and interested others with "pocket" video cameras, train them in basic production and editing techniques, and facilitate the distribution of their eyeJAZZ productions."

This project is one of the better representations of the spirit and objective of the original Jazz.NEXT initiative; providing a relatively small amount of capital to create a unique, innovative and successful project with potential long term impact. It promotes Jazz in the media and public sphere at the grass roots levels where obvious communities do not exist. Comparing NPR and Jazz Journalists organizationally the two could not be more different in resources, capacity and technical acumen.

The project was well-organized, well-articulated and run with clear metrics. The training was so well-received that 52 others *with their own cameras* joined the official class of 35 with 8 of these receiving completion certificates for a total of 31 graduates (89% of a target graduating cohort of 35). Training was extremely rigorous. Over 215 videos were created and with the help of Jazz Journalist facilitation some were published in JazzTimes, City Arts New York and Capital BOP. Additionally, trainee videographers published their work in local venues. Aside from the obvious "products" – 1) new media clips of Jazz created for journalistic consumption 2) online media venues interested in publishing them, and 3) clubs and artists interested in being promoted -- *Over 20 hours of <u>reusable</u> online curricula was created in the course of training the Jazz journalists*. How this is edited and leveraged may have more long term impact promoting Jazz than the graduates the grant originally trained -- and who are still creating jazz clips. About a dozen of the graduates have actually sold material they produced and one has formed a company creating videos according to eyeJAZZ guidelines for creating clips.

Addressing the 800 pound gorilla in the room, JJA is a small, primarily volunteer organization run by a personality with limitations in the diplomacy department. That being said, it's hard to overlook passion, organization, dedication, innovation and accomplishment, and sometimes sharp elbows are needed to get things done. The other issue is trust (or lack thereof) bestowed on journalists in general. As a rule, artists, promoters and venues would much prefer positive reviews of their work to objective journalistic reactions which might be negative. Hence a built-in reticence and/or suspiciousness often must be overcome to providing access, particularly to the "cub" reporters that the project creates. A number of benefits were realized in addition to the core program that is as important as its original objective:

- A complete and reusable online curriculum.
- A set of legal guidelines that set out best practices and protect copyright and other rights.
- An active online community that can be activated to report on jazz around the country.

Relevant eyeJAZZ links:
http://www.eyeJAZZ.tv/p/about.html
https://www.facebook.com/eyeJAZZ
https://www.facebook.com/groups/eyeJAZZOrganizers/ ("private" group)
https://www.facebook.com/groups/eyeJAZZTrain/ (a "private" group)
http://vimeo.com/search/videos/search:eyeJAZZ/st/f9cb4a47 (3 pages of training session webinars)
http://news.jazzjournalists.org/2011/02/eyeJAZZ-tv-applications-close-remarkable-response/
https://sites.google.com/a/jazzjournalists.org/jja-video-project/assignment-submissions

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Dave Douglas and Greenleaf Music

Dave Douglas took on a particularly ambitious and challenging technical project all at once including:

- The generation and promotion of new Jazz content
- The overhaul of its web platform and movement to a larger scale cloud computing environment
- The creation of a branded new media [cloud] player for its content
- The development of mobile apps on multiple platforms
- The development of a Wordpress API that automates a lot of the functionality for an artist to get online with his/her material and promote it on social networks.

For the sheer scope of the project with a limited budget and timeline Dave Douglas executed the project relatively well with at least one unforeseen outside factor influencing final delivery. None of the other projects were as broad or ambitious in their technical development which included a website, server overhaul, mobile applications and a Wordpress API with social networking capabilities for artists to use.

Related to issues it could control the project scaled back on its mobile platform development to focus on Apple versus Android platforms because of a combination of cost and technology development issues as well as the reality that a larger percentage of its audience used the Apple platform. By the time everything else had been built Dave Douglas had exhausted the budget and will only develop the Android platform when more funding comes available. Better upfront project planning might have resolved the Android development issue. The decision to correct course during implementation and focus on at least one mobile platform (iPhone App) and the other elements of the project was a reasonable one given the limited time and budget.

An unforeseen circumstance that further delayed Greenleaf's planned March 2012 launch/promotion of the project until May involved a classic IT issue. The Wordpress plugin for other artists was developed to take advantage of a particular aspect of Facebook and Twitter functionality which allowed users to _schedule_ future postings to both). Unfortunately Facebook recently modified its offering significantly and the function that allowed this automatic future posting to occur was modified in a way that effectively rendered this particularly [important] functionality of the Dave Douglas Wordpress API useless. This is just the type of issue that makes systems projects so tricky/costly/time consuming. The Wordpress API had been completed user tested and was just about to go live when this occurred.

Dave Douglas/Greenleaf had to find the problem, determine it was the result of a change in Facebook functionality, and then work around it. That's where the Artist's API stands at this point. It had to be retested with the workaround functionality. There are currently four artists representing real end-users of the completed product testing the plugin, (Matt Ulery, Linda Oh, Curtis Macdonald and rock band Brighton, MA). In addition to the Facebook issue, the artists have been providing feedback to make the app more user-friendly. Once Dave Douglas is confident the plugin has been fully tested for the second time, promotion will begin heavily.

For all the various project components, the open source template for other artists to upload their content, share their calendar, etc. was clearly the grant focus. While it would have gotten around eventually to mobile app development as a natural evolution of the Dave Douglas Brand the Jazz.NEXT grant allowed Dave Douglas/Greenleaf to focus on a platform others could use as well, _(just as the Jazz.NEXT grant influencing the Symphony Space's decision to share its new mobile platform with others)._ This platform was also particularly important to the grant because the majority of artists do not have access to grants or technical expertise to build something for themselves.

Technically one could make the case that the Dave Douglas/Greenleaf project was not completed; one and not two mobile apps were created and the Artists API is still being tested. However, that's a bit too simplistic an assessment. One must balance that perspective with the broad technical objectives of the project, its potential impact and the fact that Facebook decided to change an aspect of its functionality that was out of Greenleaf's control literally at the last minute after testing had completed, thus delaying the launch of its completed API.

Greenleaf did manage to generate new content; overhaul its web platform; convert to a cloud computing environment; develop a mobile app and media player for the most ubiquitous mobile platform (iPhone) within project timelines.   Interestingly, with the development of the new platforms and release of new music Dave Douglas made #1 as an iTunes download for the first time ever. One cannot easily draw a direct correlation between being a #1 iTunes download and all the work done on extending the online platform, increased social networking and a timed limited release of new content online. However, it's reasonable to conclude that these innovations had a positive impact on reaching the #1 download status. Statistics also indicate that what Dave Douglas/Greenleaf did accomplish has already impacted audience development:

Relevant Dave Douglas/Greenleaf Statistics:
- From site launch July 2011 to December 2011, growth of Unique Visitors up 40% (2,496 > 4,034)
- From site launch July 2011 to December 2011, Mobile site Visits increased 36% (3,890 > 5,995)
- Facebook followers increased by 7% to 4,562
- Twitter Followers increased by 31% to 4,334
- New subscribers were up 11%
- There have been over 10,000 downloads of the iPhone/iPad apps

As for the artists Wordpress API – its more complete than not, and currently being comprehensively retested by the artists that will be its users with Facebook workarounds that already allow it to once again exploit the functionality of that social network. What this evaluator cannot assess yet is the amount of uptake it will have once released. However, it is clear Dave Douglass/Greenleaf is behind it, is focused on making it as easy to use as possible, and will promote it heavily once released.

The expectation is that Greenleaf site subscriptions will continue to increase as a direct result of this project. The new mobile and web platforms afford broader and easier access for artists developing music to post on it and the audience to access it. This ease of posting to it has already spurred Greenleaf to broaden the music content on its subscription site.

Relevant Dave Douglas links:
http://www.greenleafmusic.com/about - New website
http://www.greenleafmusic.com/cloudplayer - Cloud Player
http://www.greenleafmusic.com/store/greenleaf-portable-series - Greenleaf Portable Series

Symphony Space (SS) ***Monterey Jazz Festival (MJF)***
(These proposals are discussed together because of certain similarities noted in the discussion.)

Symphony Space (SS)
*"Symphony Space will create a smartphone app (**The Symph App**) specifically to showcase and stream jazz performances, which will be widely marketed to diverse audiences, and which will be open-coded and distributed to the jazz community for use by other jazz artists, producers, and presenters."*

Symphony Space focused on developing mobile applications for its project, and like Monterey was successful in creating new content for it. Monterrey additionally focused on its educational platform web overhaul (DMEP). Although Symphony Space had technical issues, when problems were unearthed it still focused on completing all objectives and modifying future deadlines to deal with current problems. The project was also handled directly by the Executive Director and had very well coordinated internal legal support for intellectual property issues. Symphony Space's stated goal is to share its mobile apps free with other third party B2B Jazz presenters, and train them to use it and its ability to produce ad revenue for them.

Symphony Space also had one of the more sophisticated multi-layered online/offline marketing campaigns planned well in advance of completion of its mobile app launch:

- 10,000 Postcards were distributed in advance of and throughout launch period, by hand at Symphony Space and at related venues. Postcards were available in the lobby.

- Both the general SS audience and jazz fans were targeted with postcard inserts in SS programs.

- Jazz music fans and folks who already know the Symphony Space brand were targeted on Symphony Space's 45,000 name e-mail list.

- All portable device listeners were targeted separately with ad placements via Google, Admob and possibly Facebook. 75% of the marketing budget was used to target smartphone users through AdMob, and the remaining twenty-five spent on mobile web users through Google Ads.

- A plan to attract downloads of the Symphony Space Live application, over the course of eight weeks, to Apple iPhones and Android devices.

- Two different ad designs for each of operating systems; one designed to attract fans of jazz and the other aimed at the theatre and culture lovers.

As a result of this three-pronged campaign – press, online, and postcard distribution - Starting in mid-January and extending through mid-February it produced:

- **Online:** Facebook Likes: 2,861 / Twitter Followers: 89

- **Advertising (AdMob/Ad Words):** Impressions: 51,227 / Click-through: 1,089
- **Postcards:** approx. 5,000 jazz-specific postcards distributed as follows:
  o Hand-to-hand (outside concert venues); Symphony Space lobby; program inserts; Bulk mail to other presenters for their lobbies. (QR code included in postcards: 118 scans altogether)

Content: Symphonyspacelive.org includes about 40 jazz programs (including multi-genre programs). At the launch of the SS app in January, it streamed Wall to Wall Miles Davis for 24 hours and repeated this stream a couple of weeks later.

Website traffic:	Since launch (Jan-Mar)	previous 3 months (Oct-Dec)
Unique:	4,845	2,399

App Development: All apps were launched on January 11, 2012, and then re-launched on January 27: App downloads to date:

Apple iOS:	1,805	**Android:**	241

Streams accessed:	Since launch (Jan-Mar)	previous 3 months (Oct-Dec)
Pages:	43,739	13,283
Files:	69,171	16,745
Hits:	619,618	18,103

A wish list for application improvements and upgrades has already been compiled. These will be undertaken in the coming months using funding outside the JazzNEXT program.

Distribution to Other Presenters of Open Source Mobile App Code: Ten-plus jazz presenters/producers were contacted to assess interest. The following have expressed a strong interest in using the code: **WBGO**; **Jazz at Lincoln Center** and **Jazz Gallery.** Each presenter has met with Murray Street Productions to learn about the app, and each has had an extended conference call with Symphony Space's Interactive Manager. The code has been embedded in a web page along with documentation and descriptions of the apps. These are being distributed to the partners, and Symphony Space's personnel will be available for follow up support. *Murray Street will also be contacting all Jazz.NEXT grantees to offer the code for their use.*

Future Revenue Generation: The apps currently have two promotional banners on the home screen, which are being used to promote SS programs. SS hopes to attract sponsors in the future, to whom it will offer these banners. Incorporating advertising through mobile services such as AdMob and Ad Words will require further development of the apps.

Relevant Symphony Space Links
http://itunes.apple.com/app/symphony-space-live/id491641010?mt=8 - Apple iOS
https://play.google.com/store/apps/details?id=com.symphony.android.symphonyspacelive.activity - Android
http://www.symphonyspace.org/live/documentation/ - Open Code

Monterey Jazz Festival (MJF)
"The Monterey Jazz Festival's Digital Music Education Project (DMEP) is experimenting with the use of new technologies to connect artists and audiences together in meaningful and mutually beneficial ways. Education and entertainment blend seamlessly together for the audience while artists are able to expand their audience base and sales revenues at no cost."

Like many projects, Monterey had not planned adequately for the legal and technical challenges they encountered. However the good news is that with some remedial support they got back on track and indeed delivered a relatively strong project with content, training material and mobile apps when given extra time to meet their objectives. As the project addendum below demonstrates, the long term impact of their original implementation challenges *did not* limit the further success and development of the project nor its ability to extend its audience reach months after the project completed. This is not unusual with technical projects. If implementation challenges can be overcome successfully, the difficulty of the moment is often subsumed in long term benefits and lessons learned. Unfortunately,

the only dark spot was that initial thought of generating revenue from the mobile app resulted in very limited success, even months later – another common web problem – monetizing intellectual property.

Relevant Monterey Statistics:
- 120 artist interviews for its educational site
- 495 recommended recordings
- 720 influential artist citations and profiles
- 840 YouTube concert videos
- There was a 53% increase (8000 accesses) to its DMEP platform by end of grant.
- Access to its Vimeo master class clips increased by about 40% to 2447 over the grant period.
- Its SoundCloud accesses and downloads increased slightly (9%) to 393 downloads.
- On Facebook, Vimeo embeds and SoundCloud plays increased by 48% and 25% respectively (Indicating the Vimeo platform was more popular for users).
- About 500 users downloaded the Monterey NGJF mobile apps by end of grant with about 3 times more accessing its iPhone apps over its Android apps (iPhones are more popular that Androids with Jazz users at this time – Dave Douglas noted this as well).
- Of the 206 unique clicks on iTunes only one $5.99 song was recorded resulting in a .30 cent commission.

Project Addendum- Monterey

This evaluator kept in touch with Monterey to determine what a Jazz.NEXT project might look like a year after completion. While this could not be done for every project due to time and scope restrictions, Monterey was selected because it represented a good bellwether. It was a first round project that had enough time to mature after completion. It had a medium sized application development challenge relative to the others, and like a number of other awardees it was a live presentation venue. Management was also behind the project and the organization had a good financial footing, again reflecting a number of other projects. Finally, like many other projects, it had development and delay challenges during implementation. The statistics below show significant gains in Monterey audience development and interest a number of months after completion despite the original implementation challenges. Monterey also continues to add new mobile apps and content to its initial successes.

Jazz.NEXT covered the original development costs of the DMEP iPhone and Android apps and MJF then covered the development of its 2011 Next Generation Jazz Festival (NGJF), and the 54th Annual Monterey Jazz Festival (MJF/54) apps. The MJF/54 app was very well received by patrons and the press who enjoyed being able to read concert schedules in the dark. The MJF/54 app also featured live web streams from one of the stages -- a first for MJF.

MJF has since signed on to have Seed Labs build new versions of all three apps in 2012. The updated DMEP app will feature the 50 new interviews recorded in 2011, new links into Amazon for each recommended recording, and a database featuring educational artist quotes MJF has gathered from its interviews. The new DMEP and NGJF apps will be out in early March and the new MJF/55 app will be live in April 2012.

The prospective sales of songs on iTunes and Amazon both underperformed, and were nominal. People come to listen to the artist interviews but it doesn't seem to translate into online sales of their material through the Monterey platform.

Monterey Audience Development just after platform completion and half a year later:

	All of 2011	**19-May-11**
	App: DMEP, NGJF, MJF/54	App: DMEP & NGJF
Mobile Apps:	**3403**	**1011**
iPhone Downloads	2073	1011
Android Downloads	1330	629
Total Downloads	3403	382
Total Sessions	26038	5537
Total Time Spent	981 Hours	124 Hours
SoundCloud:		
2011 Plays	11995	7418
2011 Downloads	938	393
Vimeo:		
2011 Plays	4605	2447
YouTube:		
Total Plays:	13519	
DMEP Website:	**In 2011**	**In 2010**
Total 2011 Page Views	196177	12536
2010 to 2011 Page Views	1,565% Increase	
Top 10 DMEP Pages		
909 Page Views	Harry Connick, Jr.	
783	Dave Brubeck	
556	Wayne Shorter	
532	Esperanza Spalding	
470	Brian Blade	
439	MJF Clinicians	
430	Jeff Hamilton	
424	John McLaughlin	
410	Joshua Redman	
407	Wynton Marsalis	
2012 DMEP Inventory:		
171	DMEP Interviews	
999	Influential Artist Citations	
679	Recommended Recordings	
11	Master Class Videos	

Savannah Music Festival and Berklee Music
(These proposals are discussed together because of their similarity.)

Savannah Music Festival
"Savannah Music Festival's (SMF) primary jazz technology objectives are to digitally document and disseminate the creative and academic work of jazz artists, enhance communication between students and teachers, and connect members of the jazz community with each other, while also engaging audiences and strengthening the infrastructure of the jazz music field."

The Savannah Music project met its content, audience, performer and promotional objectives, designing and implementing an attractive platform on time and budget. It demonstrated a clear *vision* and project managed the implementation appropriately. It gathered input from all stakeholders, (clinicians, band directors, students, etc.) and continues to learn which features are most successful and which to modify.

Savannah's objective was to create a platform to manage and distribute its training and performance material through a web-based learning platform and it accomplished that objective.

Relevant Savannah Statistics:
- As of January 2011 it had 1540 unique visitors to the new platform and 42 applicants.
- It produced almost 70 audio concerts and 22 Radio Shows.
- It also produced 12 video interviews, 4 video concerts and a 40 minute documentary for marketing its program to classrooms nationally.

Its post grant challenge is securing additional funding in order to market and disseminate the newly created web-based learning center to jazz students across the country.

Relevant Savannah links:

http://www.swingcentraljazz.org/inspiration/videos/overview-swing-central-jazz.php
-General project promo video
http://www.swingcentraljazz.org/vote.php *- online combo competition and voting system*
http://www.swingcentraljazz.org/inspiration/videos/ *- Playlist Players*

Berklee Music

"Berklee College of Music will implement an interactive, web-based project to connect in new and creative ways high school jazz musicians and band directors who participate in the college's annual High School Jazz Festival. Berklee will use online technologies to promote and develop interest in jazz music, jazz education, and jazz careers among high school students and teachers throughout the United States."

Berklee chose very a different tact in its development, focusing not as much on a completely new platform but rather on a significant enhancement of its web site, the addition of some new functionality (online registration) and a real focus on promoting user ownership of the process by inviting students to participate and shape the project through social networking and actual development. While similar to Savannah in objective, Berklee focused quite effectively on process rather than platform. It will be interesting to see in a year or two how Savannah's more top down platform development approach and Berklee's grass roots participation approach impacts the success of the two initiatives. In particular, it will be interesting to see who generates a larger and "stickier" audience and better experience for bands, band leaders, general users, and artist/teachers.

Relevant Berklee Statistics:

- Berklee more than doubled the visits to its site to 9013 unique visitors.
- YouTube channel views increased by 249% to almost 10,000 views.
- By creating a Facebook fan page rather than a group it increased viewership and participation by 1500% and 1800% respectively by more efficiently using the power social networking. "Likes" increased by 10% to a total of 3,368.
    - People Talking About (*the number of unique people who created a story about the BerkleeJazz/HSJF Page from 3/3 to 3/17):* 547 people
    - Virality *(the number of unique people who saw a story published by a friend about the BerkleeJazz/HSJF Page from 3/3 to 3/17)*: 25,630 people
    - Reach (*the number of unique people who saw any content associated with the BerkleeJazz/HSJF Page from 3/3 to 3/17)*: 27,197 people
- UStream (BerkleeJazz live coverage of the HSJF auditorium shows)
    - 745 unique viewers tuned in through the day. 360 hours of live coverage were viewed.
- Around 200 school bands/vocal groups participated and 5,000 attend Berklee's jazz festival.

The revamped website, made possible by the grant, is now in full use and helped Berklee register all the participants (nearly flawless and seamlessly they say). The new site is complete with festival info (some of which could not be put on the site, including the new competition schedule) and the community/blog section. This year, instead of giving band directors CDs of their performance, Berklee uploaded all of the audio files right to the site. Also, the evening awards were streamed live.

Recent budget cuts may impact the Berklee project adversely, or at least slow it down. Economic realities dictate it will have to rely more on volunteer student rather than staff support to keep it going. However, since it was operationalized using student support to begin with, it is well positioned to continue this way in tight economic times.

The Berklee proposal detailed specific objectives it wished to meet which seemed aspirational after its core operational project challenges were met. Responses from Larry Bethune (below), detail the extent to which they were met as of March 2012. Work is still needed to reach outside the Berklee community, and its financial concerns may further impact these objectives:

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Web: Http://internautconsulting.com

1. **Launch a "cyber-association" of high school jazz instructors where none exists:**

   - *No formal association has been formed, but now Berklee has engagement with the directors in a new way. Concurrently, an association of jazz educators has sprung up called JEN (Jazz Education Network) not from Berklee but it has a liaison.*

2. **Promote and develop interest in jazz music, jazz education, and jazz careers among high school students and teachers throughout the United States.** 0

   - *This has begun, still much to do to build it and ensure activity. Berklee has recently begun a dialogue with the Smithsonian National Museum of American History. It maintains an online jazz historical and educator resource at smithsonianjazz.org. The hopes are for of future collaborations towards enriching jazz education.*
   - *Berklee has also featured local participating high school jazz ensembles as well as profiles on this year's featured clinicians (SFJAZZ, Hailey Niswanger '11, and Kendrick Scott '03).*
   - *Berklee has primarily focused on the human interest element surrounding the HSJF2012, which it believes helps spur and bolster interest in jazz.*
   - *The site has largely revolved around HSJF 2012 and is offering festival wrap-up coverage.*
   - *Berklee have offered articles and video on rehearsal and performance preparation tips ([Boston Arts Academy article](#) and [Kendrick Scott article](#))*
   - *Berklee has an album of the week offering historical content on jazz's most notable records*
   - *Berklee Has introduced two new series:*
     1) Jazz Influenced - offers a glimpse at non-jazz artists who have been influences by jazz (Stevie Wonder and Steely Dan)
     2) Piano Spotlight - bio pieces on some of jazz piano's most influential players (Oscar Peterson, Art Tatum, & Bill Evans -- more to come)
   - *Berklee will transition to broader jazz-related topics in the coming weeks, including more Jazz Influenced and Piano Spotlight*
   - *Berklee is exploring the addition and implications of a message board to the site*
   - *Berklee continues to seek online resources for networking/collaborative opportunities*

3. **Allow Berklee to expand the reach of the festival beyond the northeastern U.S. to other areas of the country:** *Have begun this, further cultivation and expansion required.*

4. **Distribute educational materials:** *Have not done a lot of this, more a second phase after festival*

5. **Will be a vehicle to engage jazz communities:** *It will, but we have just begun to build, right now focusing on our known community (high schools) and moving to engage other communities.*

6. **Exchange ideas about jazz performances:** *When we have an active "membership," then this will happen, not really happening, yet. The message board above is designed to help facilitate this.*

Relevant Berklee links:

http://berkleejazz.org/ - main site
http://berkleejazz.org/ensemble-schedule/ - competition schedule
http://community.berkleejazz.org/ - main community page
http://community.berkleejazz.org/thecheckout/ - "The Checkout" interviews
http://community.berkleejazz.org/community-information/ - community info

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Walker Arts

"The Walker continues to implement/experiment with a variety of on-line and other approaches to build and engage jazz audiences. We're actively seeking to involve/engage audiences before, during and after performances, building new resources for outreach, participation and education. In particular, we continue to create relationships with new, younger audiences through diverse educational, new media, and social networking platforms, as well as building greater understanding and loyalty among existing jazz fans. Interdisciplinary programming enables the Walker to potentially draw new audiences from its visual arts and non-jazz audiences."

The Walker statistics point to a moderate success at generating more audience and awareness.

- Walker managed 18 jazz blog posts over the course of the grant and a series of articles by Jeremy walker on Jazz. Both found a unique readership in the 100's with Walker's articles twice as popular.
- For the launch of the 2010/11 season, Walker created a music download card which they handed out at our Performing Arts season preview, season opening party, and first jazz show. These cards featured a web address patrons could visit to download a free song from each of the musicians/music groups participating in the 2010-11 Walker Performing Arts season. Final data confirmed that 15% of the cards had been redeemed.
- The Bill Frisell curatorial talk received over 4,300 page views and according to Walker "extensive" comments on YouTube, (this interviewer noted 18 comments in January 2012). A shorter edited clip received 1,959 views. These clips spread to dozens of aggregated sites. More curatorial interviews were scheduled.
- In Walker's post-grant online survey following the Brad Mehldau and Jenny Scheinman concerts, only 37% of those surveyed indicated that they were "aware of the online Jazz content (videos, interviews, articles) on the Walker website and mnartists.org." 3% of those who attended Brad Mehldau's concert found out about the concert through online ads. Online ads were the result of working with Walker's Marketing department. Its *New York Times* jazz branding ad ran for over two months and received 103 click-throughs to the landing page. A Facebook ad ran for two months and received 308 click-throughs. Minnesota Public Radio online received 515 click-throughs.

Relevant Walker links:

2010 blogs entries :
**http://blogs.walkerart.org/performingarts/2010/07/20/jazz-now-walker/http://blogs.walkerart.org/performingarts/2010/07/29/walker-jazz-radio/
http://blogs.walkerart.org/performingarts/2010/08/30/catch-walker-jazz-radio-before-it%E2%80%99s-gone/** - About summer Jazz initiatives

http://blogs.walkerart.org/performingarts/2010/10/18/young-players-dig-brad-mehldau/ - Blog collaboration with MacPhail kids

http://blogs.walkerart.org/performingarts/2010/10/08/spark-of-being-retelling-a-literary-masterpiece/ - Overnight Re: View:

Walker Channel curator interview examples:
**http://www.walkerart.org/channel/2010/dave-douglas-in-conversation-with-curator-phi
http://www.walkerart.org/channel/2010/jenny-scheinman-in-conversation-with-curator-**

Jazz events trailer:

http://www.walkerart.org/channel/2010/a-look-at-dave-douglas-and-bill-morrisons-spa
 YouTube video of Bill Frisell with PB:
http://www.youtube.com/watch?v=nvW6H4iPeeo

National Federation of Community Broadcasters (NFCB)
"The National Federation of Community Broadcasters (NFCB) embarks on a project designed to promote the preservation and forward progression of jazz music – the Jazz InfoVault. In direct response to meetings/conference calls with several of the nation's leading jazz stations within public radio, NFCB will design, test, and implement a national metadata and music database. The Jazz InfoVault will serve as a downloadable jazz encyclopedia and digital music library at public radio stations around the country to improve upon the presentation of jazz on air, online and on mobile devices."

To meet its Jazz.NEXT grant objectives NFCB was supposed to run a pilot and put its new searchable online database into production with 10 Albums and/or 100 of the most popular Jazz tracks on it as selected by top Jazz radio station project participants. It then expected 2-3 stations to review and pilot the new online platform.

To date there are about 80 tracks from 15 albums released over a span of 30 years as well recording dates and locations for the tracks, and some cover art and/or review links (copyright is an issue here). There are 103 musicians, the instruments they play, birth and death dates, and links to bios where available. A couple of stations have looked at the site (WDNA [Miami],KTSU [Houston] and KCSM (San Mateo) and their cursory feedback (partial page emails) is positive, although no one seems to be piloting the prototype, and some data (release dates) require cleanup. NFCB has requested feedback on a few occasions with only this email feedback received to date and more supposedly on the way soon.

Some Technical issues causing error in the prototype appear to have been cleared up since this evaluator last used it in January, and indications are consultants were brought back to fix them. The pilot is functional with most of the originally proposed data populating it.

The pilot now appears to be dormant. One of the issues with such inactivity is that the hosting provider occasionally updates the underlying operating system, database and PHP application on the server. This could cause the system to destabilize or some functionality to not work in future because of backwards compatibility issues (a standard issue related to customized applications on hosted server) if no active support for the pilot exists to update it.

The Executive Director's original thought was that once the database was up and populated with comprehensive records of the 100 most popular identified tracks, it would be much easier to find funding for the project. No further addition of new records was anticipated for the system without further funding; not even the continued entry of less detailed records to broaden its appeal and usefulness to stations. Because the objective of the project was to create a system and populate it with 100 of the most popular tracks, a comprehensive plan had not been developed to populate the database automatically with far more records.

Relevant NFCB links:

- **http://www.jazzinfovault.org/design2/** The prototype with all the functionality
- **http://www.jazzinfovault.org** page only shows the overall header design and says "Coming Soon"

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Manchester Craftsman's Guild (MCG)

"This project will be the design and implementation of the next two phases of the Jazz Information Commons (JIC). The JIC is an interactive website which provides a meaningful way for the public to interact with data about jazz performances in the United States (past and future) that motivates and inspires online visitors to become more active supporters of jazz through live performance, purchases of recorded products, social networking and advocacy. The first phase of the JIC is in the final stages of completion. The proposed project will develop and implement the presenter and consumer facing interfaces. The platform is open source and allows for API's to connect to the JIC database from countless perspectives."

This initiative was clearly one where the vision and project objectives were far too outsized for the parameters of the Jazz.NEXT grant in both time and money. It was in the works well before the Jazz.NEXT grants were announced and the grant became a way of resourcing and focusing the project. However, while the project fit the Jazz.NEXT innovation criteria its scope, time requirements and cost did not.

As of this report I was told the project (back end, user interface and mobile app) was still on track to be complete and launched "sometime" in April. Experience indicates that if this evaluator were to come back to check at end of April, some items would still be in process of being fixed, and data loaded -- but the project is much closer to launch than not at this point, and something should be available by June or possibly earlier. Checking the site (http://www.thejazzcommons.org) it is obvious most of the software infrastructure is in place, and it is clear what MCG is trying to capture. Doing a search however, the data is just not there in relevant form to demonstrate MCG's objectives. Census data was finally received for the crucial venue information and geo-locating aspect of the project, but has yet to be added. Also:

- There are still items left to fix in the application.
- A script needs to be written to load the census data. Only census location data relevant to presenters in the system will be loaded to avoid extraneous data.
- Only three presenters have yet to sign on to load their data (MCG, Animal Crackers and Smithsonian Jazz). This evaluator was recently told is was purposeful because MCG wishes to wait for the app to be complete and census data to be loaded before asking more to join, and the summer will be the best time to do so –this suggested delay/reasoning of signing on new presenters was new information to the evaluator.
- At present, the system maintains 38K-39K records on a daily basis. Minor past events are dumped from the aggregator feeds each day so that the system doesn't get to full of useless data. All individual presenter data is kept permanently on the system.
- 10% of all MCG site users come from the mobile platform; a significant but relative difference as only 70 users per day visited the site over the last 10 months (ref: Google analytics).
- It will still be some months before one can assess if presenter and aggregator information is making it into the system, and more people are making use of it. Many assumptions have gone into these points, and there is somewhat of an "if you build it they will come" attitude that has not proven itself valid yet. However, as a work in progress, it is an innovative and compelling concept to aggregate and analyze relevant performance and venue data with a lot of the design and programming work already completed.

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The site:
- Has the potential to be an impressive Jazz aggregation site mixing Jazz content, real ticket data and census demographics.
- Provides presenters an extended venue for reaching their audiences and consumers with more options to view, follow, learn, attend and purchase.
- Provides all a level of aggregated data and visualization to make analytical decisions that may not have been possible without it. There is also enough already tangibly completed to demonstrate both the vision and the will to execute to completion.

In short, the vision is valid, and execution to date clearly demonstrates *potential*; but:
- A $150,000-$200,000 grant (if not more) over 18-24 months was more realistic for this project.
- There is still 6-12 months off between having the apps done and evaluating use (e.g. presenters and aggregators adding data and consumers using it).
- Due to technical challenges and data ownership reticence presenters and aggregators have to date not flocked to provide their data to the system.
- Expected census [demographic] data important to the system has only just arrived and more programming is necessary to enter it.

Relevant MCG links:
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User Project Summary

In future, to meet a dual objective of assessing platform completion *and* getting enough real data to assess initial audience development a project timeline of 16-18 months is far more plausible; especially to evaluate projects were technical platform development is the priority. Where platform development is not the project priority, 12-15 months is a more reasonable timeframe. This evaluator had already *added* a fourth evaluation reporting period to each of the two awardee cycles assuming that the initial timelines would be too constricted. With the fourth cycle added, the assessment was able to make up for project delays and report successful platform completion (or near completion). However, in the case of Monterey, Berklee, Symphony Space, NFCB and Dave Douglas (60% of total projects) even the added reporting cycles proved too limited to evaluate audience development. As this was a donor priority and original objective, further extended reporting was added to pick up this data.

Had the evaluations been restricted to the original *actual* grant period rather than a few months after expected completion, *only two of the ten projects* (NPR and eyeJAZZ) would have had enough time to both complete their projects *and* gather real data on user impact. NPR had a clear organizational, technical and structural advantage and was building out an existing platform. The eyeJAZZ project did not create a new platform for its project but rather used existing social networking tools. So it's reasonable to assume that more time is required to evaluate these types of grants because the majority of other awardee's focused on application platform building -- which proved to require more time. Finally, application development delays occurred in both rounds, one (25% of grants) in the first round and five (80% of grants) in the second. They were more acute in round 2 because:

1) There were [1/3] more grants with the potential for delay.
2) Many of the round 2 awardees concentrated on both platform development and moving what they produced out to audiences beyond their own institutions (round 1 awardees primarily concentrated their objectives internally). This requirement to meet the needs of more diverse constituencies added a cooperation component requiring more time to facilitate it.

The size of the original grant raises an interesting point of conjecture. A number of grantee's could have used a larger initial grant to extend their activities and indeed NPR noted the beneficial effects of effectively doubling its grant for this work with the follow-on innovation grant it received. One is left to consider if a larger initial grant would have increased the pressure on Walker to better coordinate and implement the project as a priority within its institution. Put another way, in a large institution like Walker; did the limited size of the grant against what could be technically accomplished lead to a smaller vision that effected its prioritization in the organization? Conversely, for the Jazz Journalists Association and its project goals, $75,000 was still a significantly large grant.

APPENDX A: THE GRANT EVALUATION PROCESS

Evaluation Methodology and Report Templates

This section defines the basic templates, methodology and metrics used for the evaluation and reporting process.

Objectives

We are all familiar with the standard post-mortem program evaluations when it is too late to help a grant succeed or be more successful. Jazz.NEXT was designed as an innovative experimental program with an evaluation component that was designed to be more formative and activist:

1) It helped the grantor evaluate program progress.
2) It evaluated the program *during* the implementation process when feedback is most effective in identifying problems and providing remedial assistance to resolve them.
3) It helped the grantee assess program progress with a relevant management tool.
4) It helped the grantee turn useful evaluation information into solicitations for more audience, artists, partnerships and funding.

Methodology

The methodology was rather simple and designed to be minimally intrusive.

1) At the beginning of the grant cycle each grantee was asked to design and submit a report over the course of the project of no more than two pages long (see next section for details).

2) These finalized reports were submitted over the course of the grant at quarterly intervals. First round awardees reported in these four periods: January-May-September 2010 and January 2011. Round 2 awardees reported in these four periods: January-May-September 2011 and January 2012. The last (fourth) reporting cycle in both rounds occurred after the grants [should] have completed. ***Note:*** An additional reporting period was added for 1 grantee in the first round and 4 grantees in the second due to project delays.

3) During each report submission cycle the evaluator contacted the grantees to discuss the results of the report submitted, clarify any information and also note any support requests or observations (outside of extra financial help from the original grantors) the grantee might have. The grantee reports submitted to the donor each quarter included a separate report of their interviews and evaluator analysis.

4) The information in the reports allowed progress to be measured over time based on objective and subjective metrics starting with a baseline in the first report and then progressing. Reports designed by each grantee also contained standardized elements of information (see next section) making them comparable across project initiatives.

Evaluation Report Template Content

Each grantee report contained the following information relevant to its project:

1) A short "news" section updating project progress.
2) A brief section on any capacity issue or challenges the project has come up against.
3) Three to four metrics that tie directly to the objectives identified in the grantee's project summery/objectives statement and that are measurable over time.
4) A section on marketing and promotional activities.
5) A subjective testimonial or case study section relating to how the program affects an individual artist or audience to balance the objective metrics.

The individual grantees were contacted at the beginning of their respective reporting cycle and submitted the templates and metrics they expected to use over the course of the grant in order to make comparisons across grant duration possible for each individual grantee.