

The Woodlands Township

# Cultural Facility Needs Assessment

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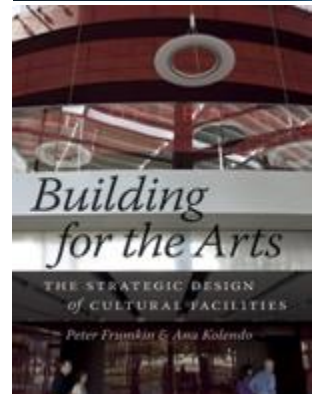
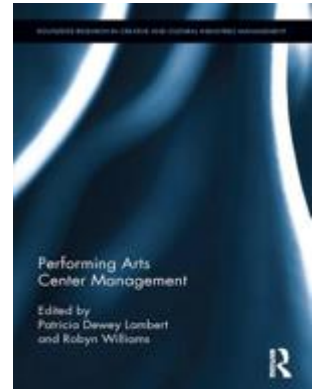
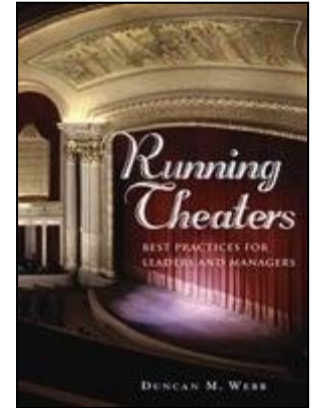
# About the project



# Webb Management Services

- \* Webb Management Services, Inc. is a management consulting practice for the development and operation of arts and cultural facilities. We work for governments, schools, developers, and arts organizations on facility feasibility, business planning, and strategic planning. Our practice was founded in 1997, and we recently started our 381<sup>st</sup> assignment.
- \* We have conducted two previous studies in The Woodlands in 1998 and 2006. Other recent projects in Texas include the MATCH project in Houston, the Dallas Arts District Business Plan, and the Buddy Holly Performing Arts Center in Lubbock.
- \* Duncan Webb authored *Running Theaters* in 2005, a best practices guide to the operation of multi-user performing arts facilities in North America.

building creativity





## Study brief + background

- \* Located 30 minutes north of Houston, The Woodlands is a master-planned community with a multitude of indoor and outdoor recreation opportunities.
- \* For many years, the Township has discussed the possibility of developing a Cultural Arts Center, a facility that could house a theater, exhibition space, museum, administrative offices, classrooms/studios/rehearsal spaces, public spaces, and green spaces.
- \* The community is already home to the 16,500-seat Cynthia Woods Mitchell Pavilion, an outdoor amphitheater that functions as the summer home of the Houston Symphony, a run-out performance space for the Houston Ballet, a presenting venue for the Houston Grand Opera and Texas Music Festival Orchestra, and a concert venue programmed by Live Nation.
- \* A new facility, it is thought, would complement the Pavilion's activities while providing support to, and promoting collaboration among, The Woodlands' cultural entities.
- \* To assess the feasibility of this idea, the Township has hired Webb Management Services, as part of a team lead by Gensler, to assess the need for new and/or improved cultural facilities. As and if new facilities are recommended, the team will then work to develop physical, financial, and operating plans to guide future operations.



# Assessment methodology

- \* Our assessment of needs considers the case for facilities in terms of audience demand, user demand, the existing supply of facilities, and how such a project supports the broader goals of the community and the region.
- \* To complete the assessment, we have:
  - \* Interviewed a cross-section of cultural, political, and community leaders;
  - \* Toured and assessed local and regional cultural facilities;
  - \* Studied the size and characteristics of the market area (including full-time and part-time residents, as well as short-term visitors);
  - \* Conducted a community survey;
  - \* Assessed user demand for new or improved facilities; and,
  - \* Identified the potential benefits and impacts that additional cultural facilities could have on The Woodlands and the region.



# Study informants

To complete this study, we conducted a series of 61 confidential in-person and telephone interviews and small group meetings. We would like to take this opportunity to thank all of the interview participants to date.

- \* Julie Ambler, Leadership Montgomery County
- \* Michael Arendes, Indian Springs Village Association
- \* Joel Bartsch, Houston Museum of Natural Science
- \* Mike Bass, Former Township Board of Directors
- \* Darryl Bayer, The Woodlands Symphony
- \* Nelda Blair, Former Township Board of Directors
- \* Nickole Bobley, ArtFeel
- \* Brian Boniface, The Woodlands Township Board of Directors
- \* John Brown, The Woodlands Township Board of Directors
- \* Keith Brumfield, Class Act Productions
- \* Gordy Bunch, The Woodlands Township Board of Directors
- \* Vic Cherubini, Epic Software
- \* Rebecca Coates, The Woodlands Methodist School
- \* Angela Colton, The Woodlands Children's Museum
- \* Lauren Combs, The Woodlands Art League
- \* Mary Connell, The Woodlands Township
- \* Gillian Crane, The John Cooper School
- \* Scott Cutler, The Woodlands Salon Series
- \* Betz Demonico, The John Cooper School
- \* Fred Domenick, The Woodlands Convention and Visitors Bureau
- \* Laura Fillault, The Woodlands Township Board of Directors
- \* Brenda Gottlieb, The Woodlands Art Council
- \* Cindy Hardin, The Woodlands Art council
- \* Peggy Hausman, Former Township Board of Directors
- \* Lana Hazlett, Former Township Board of Directors
- \* Linda Head, The Woodlands Area Chamber of Commerce
- \* Robert Heineman, The Woodlands Development Corporation
- \* Missy Herndon, Interfaith of The Woodlands
- \* JJ Hollie, The Woodlands Chamber of Commerce



# Study informants

- \* Robert Horton, Conroe Independent School District
- \* Brandon Kahn, Williamstown Theatre Festival
- \* Kim Lacayo, Anadarko
- \* Alecia Lawyer, River Oaks Orchestra
- \* Steve Leahey, Alden Bridge Village Association
- \* Amy Lecocq, The Woodlands Art Council
- \* Jerry MacDonald, Cynthia Woods Mitchell Pavilion
- \* Michael Maher, The John Cooper School
- \* John McMullan, The Woodlands Township Board of Directors
- \* Jane Minarovic, Inspire Film Festival
- \* Janet Mullings, Sam Houston State University-The Woodlands Center
- \* Miguel Nogueras, Jr., Scarab Club/Adnormal
- \* Don Norrell, The Woodlands Township
- \* Damon Palermo, Palermo Barr
- \* Brian Pate, Cynthia Woods Mitchell Pavilion
- \* John Powers, The Woodlands Township
- \* Rick Ray, The Woodlands Chorale
- \* Vicki Richmond, Former Town Center Improvement District

## Directors

- \* Ed Robb, Former Township Board of Directors
- \* Stuart Schroeder, Cochran's Crossing Village Association
- \* Boni Schuetz, Boni's Dance
- \* Ronald Shields, Sam Houston State University-The Woodlands Center
- \* Ann Snyder, The Woodlands Township Board of Directors
- \* Gil Staley, The Woodlands Area Economic Development Partnership
- \* Ted Stanley, College Park Village Association
- \* Don Stockton, Conroe Independent School District
- \* Alex Sutton, The Woodlands Development Corporation
- \* Dragos Tapu, Glade Gallery
- \* Tim Welbes, The Woodlands Development Corporation
- \* Shannon Wilson, Cynthia Woods Mitchell Pavilion
- \* Jeff Young, Cynthia Woods Mitchell Pavilion

- \* Bruce Rieser, The Woodlands Township Board of

## General themes

- \* Over the course of our interviews, a number of themes began to emerge, including:
  - \* Fundraising in The Woodlands is focused on services/projects/initiative that support medicine and poverty.
  - \* Traffic is becoming increasingly problematic.
  - \* More opportunities for kids, families, and the special needs population are needed.
  - \* It is important that any new facility support as much of the community as possible.
  - \* Investing tax money into a project like this will draw criticism.
  - \* Undeveloped land in The Woodlands is limited and expensive.
  - \* There is a perception that local high school venues work well for outside use.



# Context

## Previous Studies Completed by Webb Management Services

- \* ***Business Planning for Cynthia Woods Mitchell Pavilion:*** In 1998, Webb Management Services developed a business plan for the Cynthia Woods Mitchell Pavilion.
- \* ***Needs Assessment for Cultural Facilities in The Woodlands:*** In 2006, Webb Management Services was hired by The Woodlands Town Center Improvement District to undertake a feasibility study for new cultural facilities in The Woodlands Town Center. After an extensive research process, we presented the Improvement District with the following options:
  - \* A branch facility for the Houston Museum of Natural Science;
  - \* A ballet education center;
  - \* A community arts center featuring a small to mid-size performance space with 400 to 500 seats, exhibition space, a media center, classrooms and practice rooms, and community gathering space.

The Improvement District ultimately decided to move forward with the development of a Houston Museum of Natural Science satellite, completing a market feasibility study for it. The project, however, was waylaid by the Great Recession in 2008 as well as ensuing priority changes within the Township.

## The Woodlands Arts Council Cultural District Initiative

- \* The Woodlands Art Council is currently working to develop a cultural district in The Woodlands through the Texas Commission on the Arts. They are in the early stages of this process.



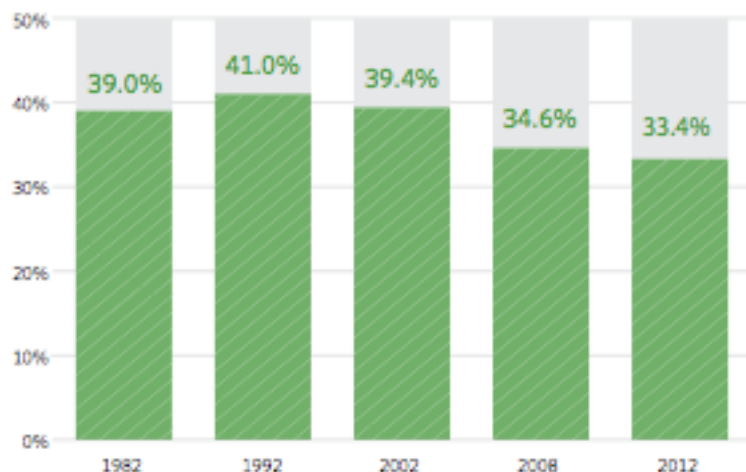
# Forces + trends



# Arts participation

- ✧ The NEA's Survey of Public Participation in the Arts has long been considered the best dataset on arts attendance.
- ✧ The 2012 survey confirmed that fewer adults are attending virtually all types of performing arts activity, a trend that has been apparent through several survey cycles.

Percent of U.S. Adults Who Attended at Least One of Various Types of Arts Performance or Visited an Art Museum or Gallery: 1982-2012



Performing arts events included: jazz; classical music; opera; musical and non-musical plays; and ballet. These are all activities for which attendance rates have been tracked since 1982.

Percent of U.S. Adults Who Attended a Performing Arts Activity, by Type (Excluding Musical and Non-Musical Plays): 2002, 2008, and 2012

	2002	2008	2012
Classical Music	11.6%	9.3%	8.8%
Jazz	10.8%	7.8%	8.1%
Dance Other than Ballet	6.3%	5.2%	5.6%
Latin, Spanish, or Salsa Music	NA	4.9%	5.1%
Ballet	3.9%	2.9%	2.7%
Opera	3.2%	2.1%	2.1%

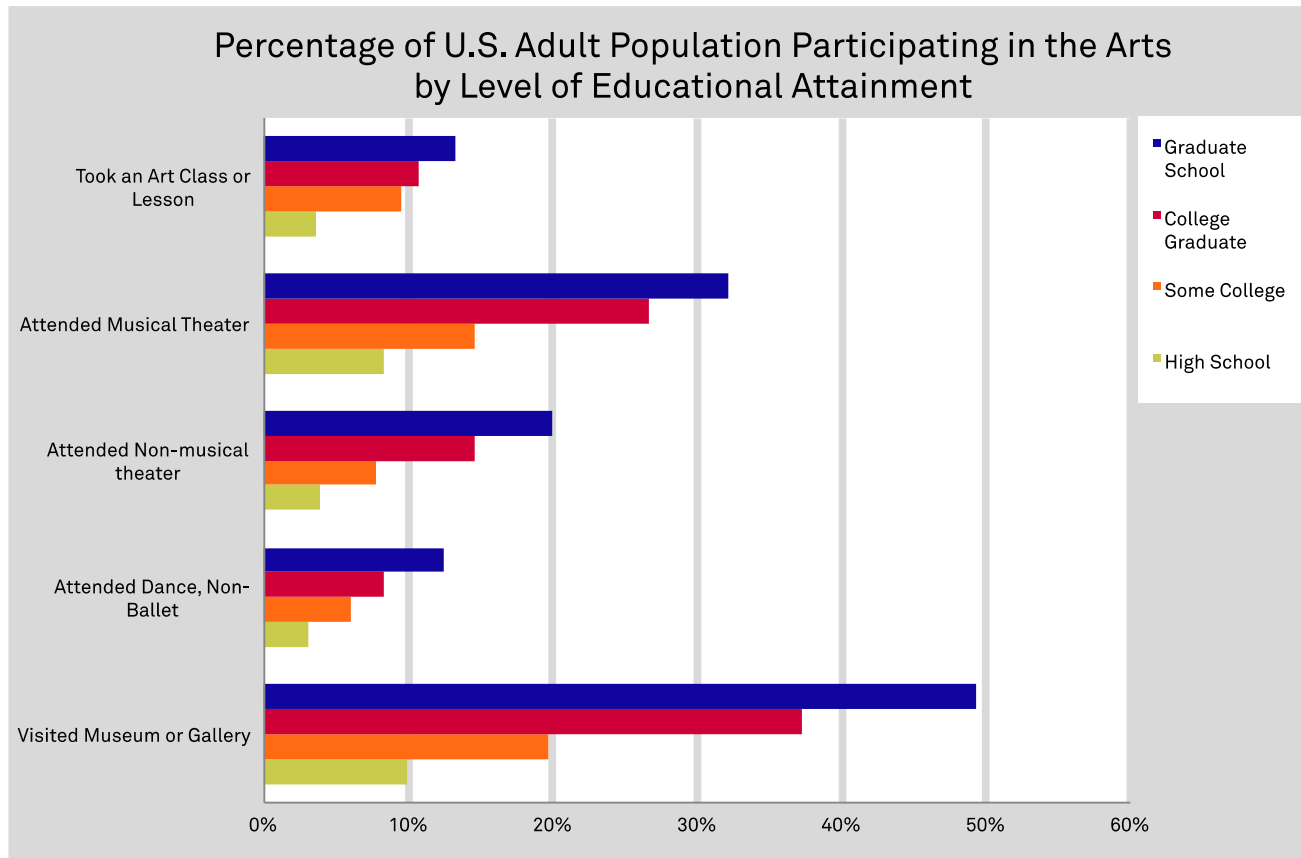
NA = This question was not asked before 2008.





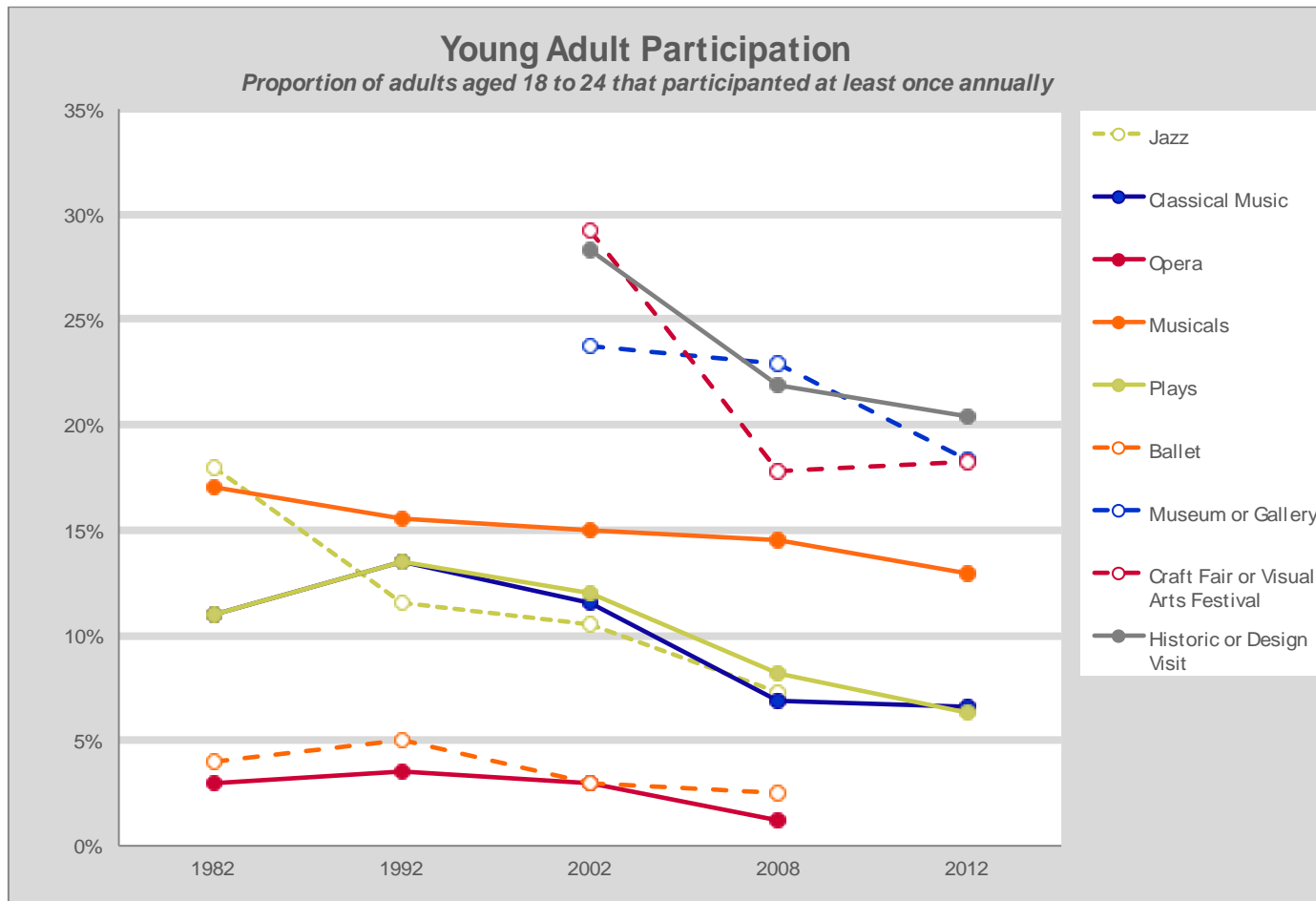
# Arts participation

\* It also confirmed that educational attainment continues to be the leading indicator of arts participation.



# Youth arts participation

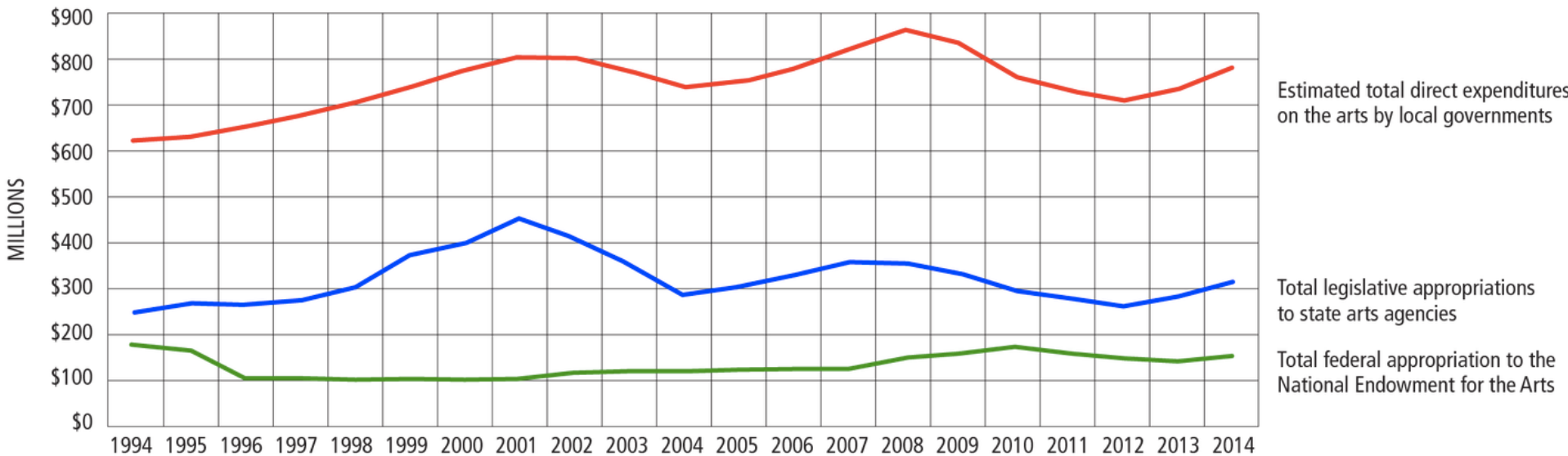
- \* And that participation in the arts by younger adults has been trending downwards for over 20 years across all disciplines.



# Public sector funding

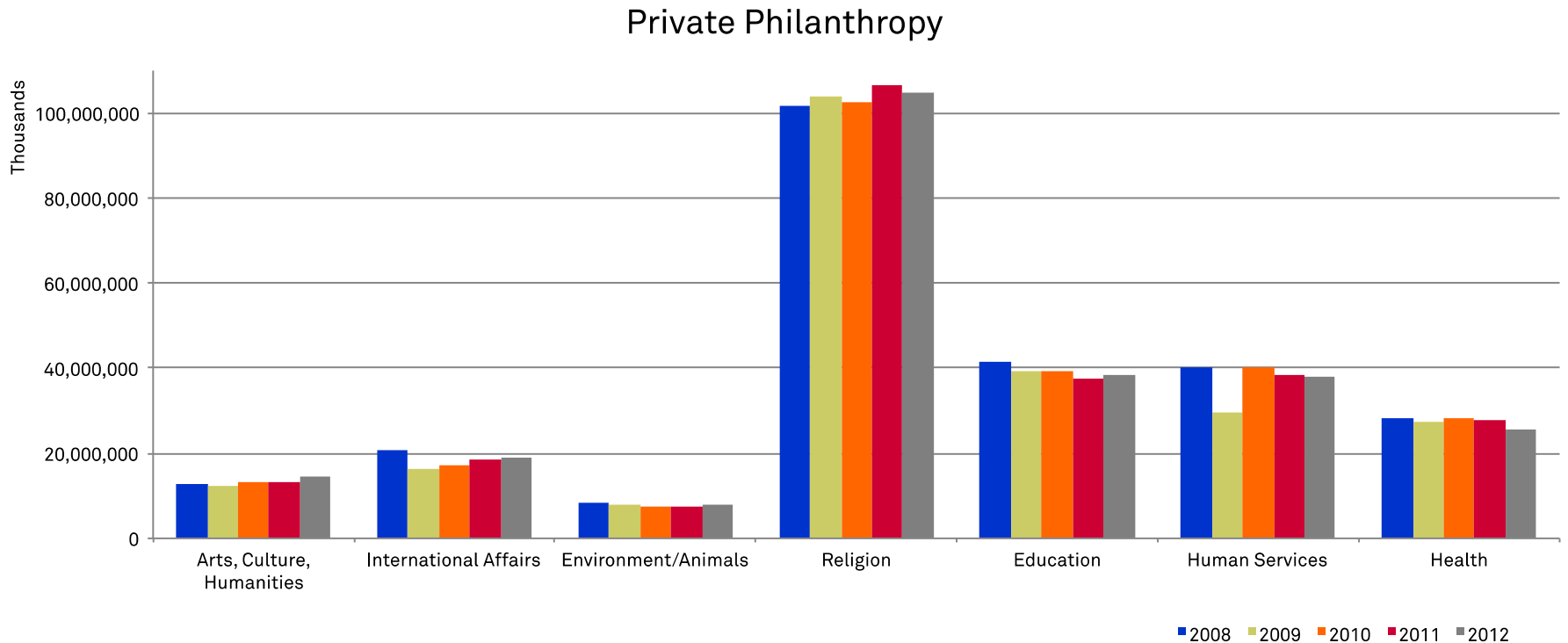
- \* Another challenge is the pressure on different levels of government to reduce direct arts funding.

**Federal, State, and Local Government Arts Funding, 1994–2014**



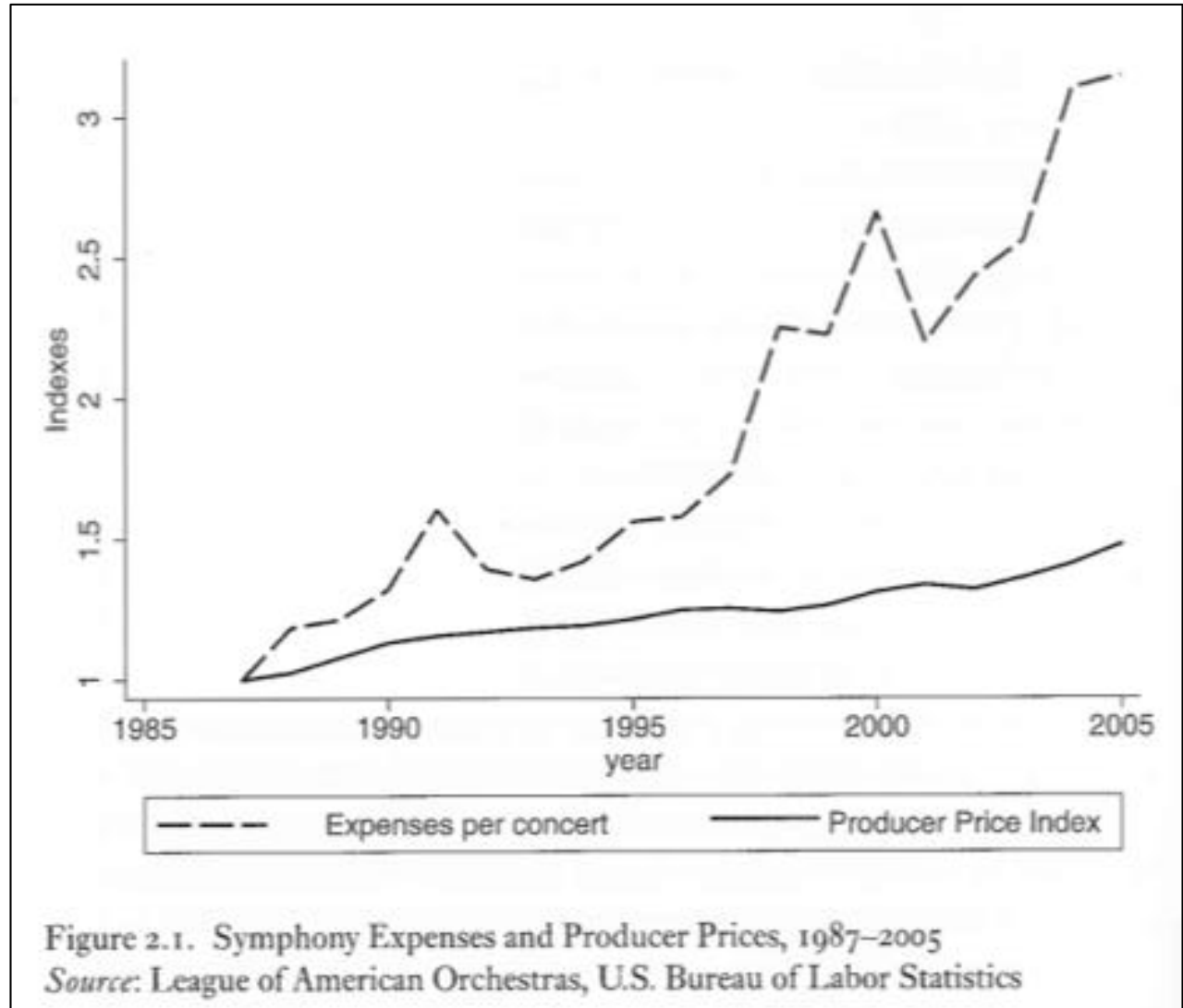
# Private sector philanthropy

- \* There is also more competition for private sector support coming from emerging areas like environmental sustainability and healthcare.



# Baumol's cost disease

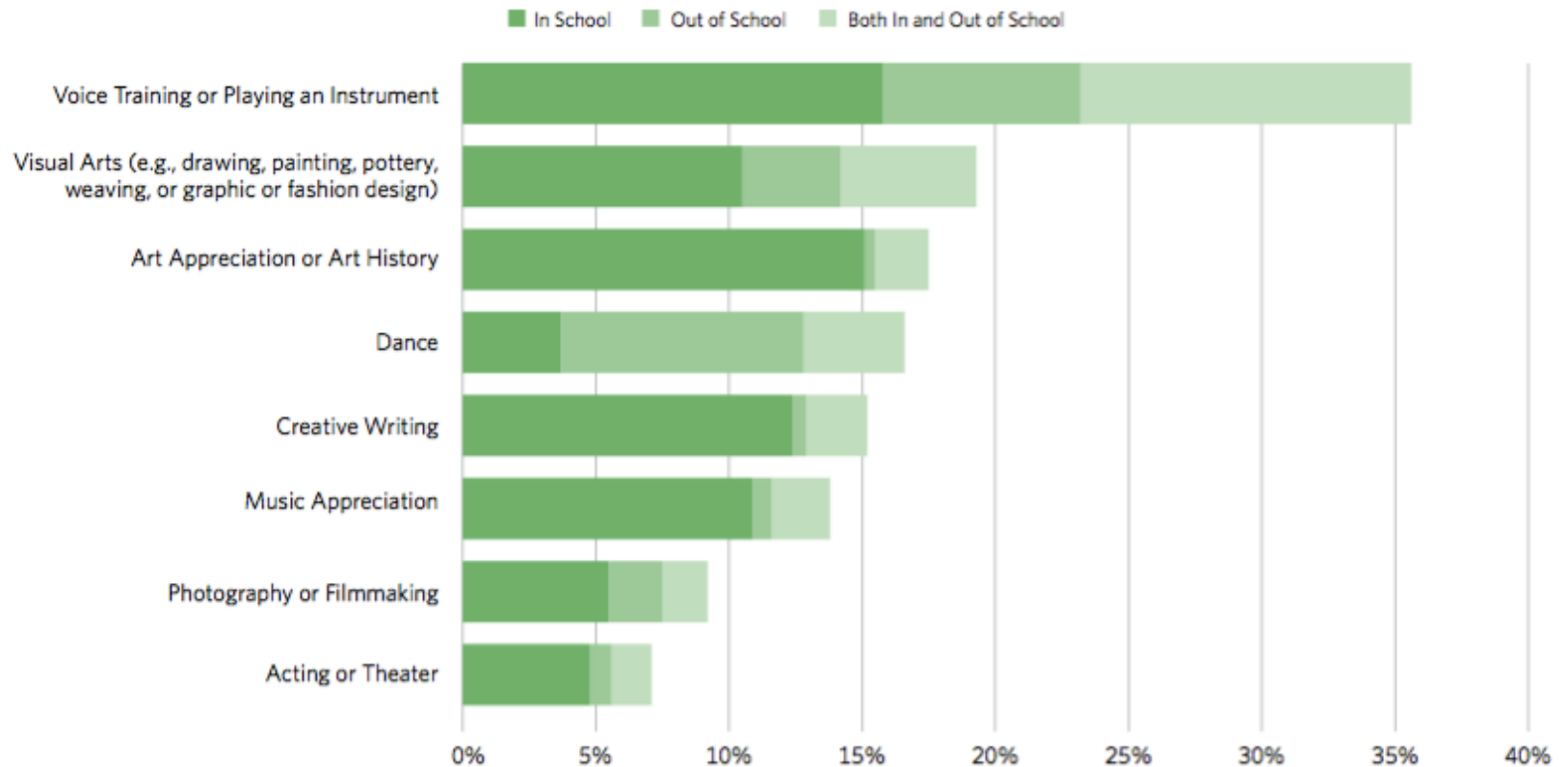
- \* The economic challenge of arts organizations is that there are no productivity gains over time in the way that the "product" is created. Thus, as costs inevitably increase, arts organizations must fundraise more money every year just to stay even.



# Active arts participation

- \* The good news is that active participation in the arts is growing, with more people looking for ways (and places) to express their personal creativity.

## Percent of U.S. Adults Who Ever Took an Art Class or Lesson, Whether In or Out of School, by Subject: 2012



# Arts education

- \* Arts education is also growing, mostly due to the development of outreach and education programs by nonprofit arts organizations.

**Figure 72.** Distribution of Funds Budgeted for the Arts (in Millions of Dollars)



The Chicago Public Schools  
Arts Education Plan 2012-2015:

**Bringing the Arts to Every Child in Every School**

CHICAGO PUBLIC SCHOOLS CPS DEPARTMENT of ARTS EDUCATION





# From palaces to districts

- \* There has been an important shift in the past 30 years away from palaces of culture towards districts of culture.
- \* Districts can developed over time and generally include small and existing arts facilities. They tend to be more inclusive and authentic in their communities. They can dramatically enhance commercial development efforts be being porous and creating a compelling destination for residents and visitors.





# The value proposition for the arts

- ✧ The other good news is that the sector is finally able to articulate a strong value proposition to justify public and private sector support. This generally involves making the connection between the arts and other key goals such as:
  - ✧ Economic development
  - ✧ Creative place-making
  - ✧ Downtown revitalization
  - ✧ Cultural tourism
  - ✧ Quality of life
  - ✧ Business and workforce development and retention
  - ✧ Community development
  - ✧ Arts in education
  - ✧ Healing – physical, mental, spiritual, and communities



# Facilities responding to changes

- \* Arts facilities are responding to these challenges and opportunities, as follows:
  - \* By embracing a broader definition of cultural activity that reflects the diversity, heritage and means of creative expression of all people
  - \* Shifting from the old image of a theater as a place that lights up occasionally for the select few to a new image of a place that is always open, always active and much more inclusive, aspiring to be the community living room
  - \* More collaborative efforts to promote the development of cultural districts
  - \* From an orientation to passive participation to a focus on active programs
  - \* From goals relating to cultural advancement to goals relating to community development
  - \* A greater focus on the social experience of attending an event
  - \* Finding ways to maintain a low cost of access for nonprofit arts groups
  - \* The addition of secondary, temporary, and outdoor spaces
  - \* Providing audiences with some measure of control over their experience



# Texas Cultural Trust: 2017 State of the Arts

- \* The **2017 State of the Arts Report** assesses the role and impact of the arts on the economy and education. Key points include:
  - \* The arts generated \$5.5 billion in 2015, an increase of 25.1 percent over the last 10 years.
  - \* In the Houston-Sugar Land-Baytown metro area, the arts had an impact of \$330 million.
  - \* The creative sector in Texas employs one in 15 Texans; arts, design, entertainment, sports, and media occupations account for 118,690 jobs.
  - \* In Houston, the creative workforce represents 8.1 percent of the total workforce.



# Market analysis



# Market analysis

## Overview

This analysis will define the market and examine the potential for a new cultural facilities to attract and serve audiences, paying close attention to key indicators for arts participation and attendance such as educational attainment and household income.

## Methodology

To define the market for new arts and cultural facilities in The Woodlands we first reviewed our previous work in and around the area as well as the PFK Consulting report completed for the proposed Houston Museum of Natural Science satellite. In addition, we mapped 2016 ticket buyer data for Class Act Productions and current membership data for The Woodlands Children's Museum.

This allowed us to define the market as follows:

- \* The Woodlands Township,
- \* A 20-mile radius surrounding The Woodlands Township Building, and
- \* The Houston CBSA.

We then collected demographic data for each market segment from Nielsen Segmentation + Market Solutions, a market research resource that expands and extrapolates Census data using a variety of inputs. Lastly, we examined local and regional tourism data in order to assess the potential for attracting regional visitors to new arts and cultural facilities.



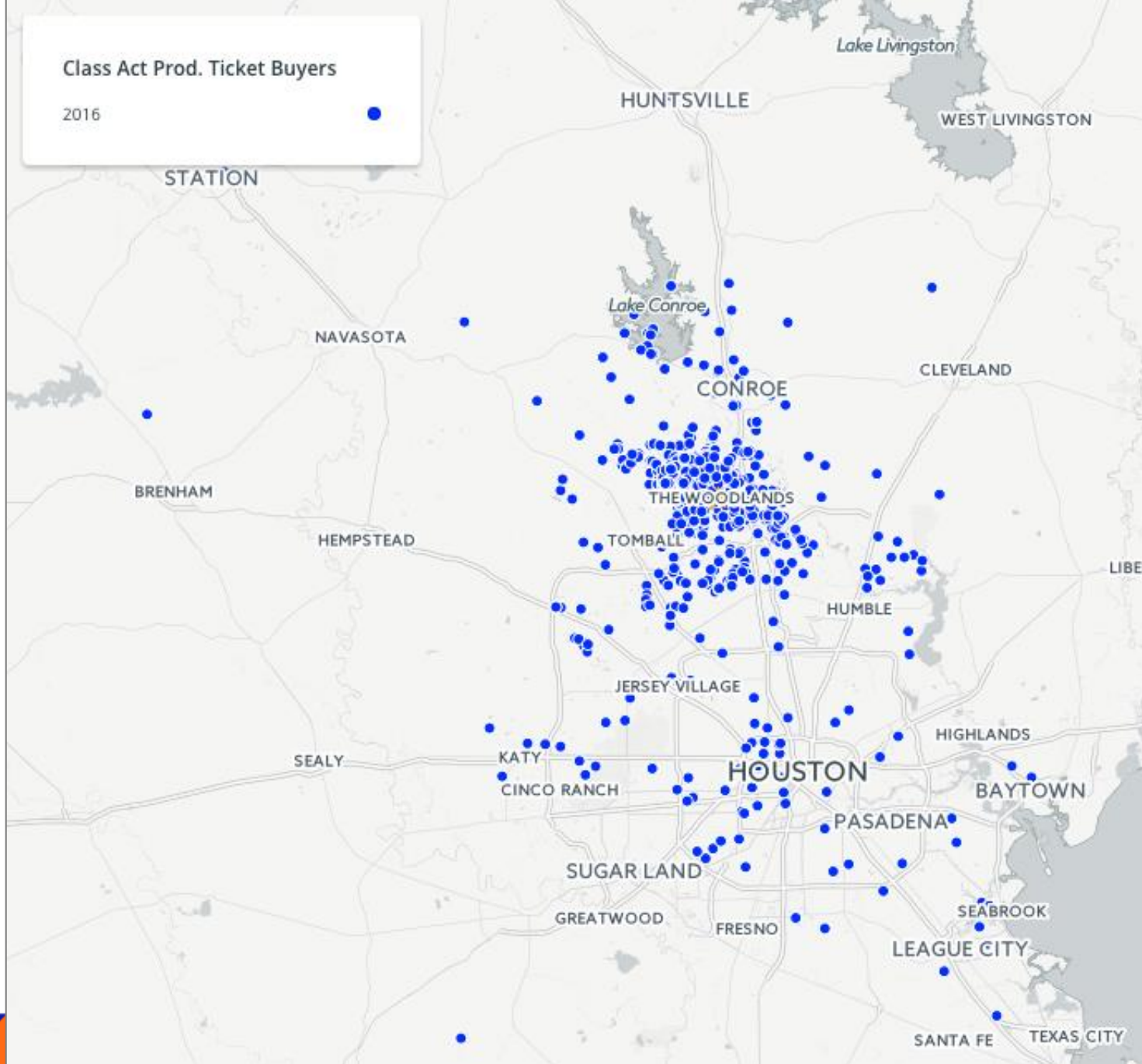
## Defining the market: other studies

- \* ***Webb Management Services' Needs Assessment for Cultural Facilities in The Woodlands:*** Our previous study in The Woodlands identified the market as The Woodlands, Montgomery County, and the Houston CBSA. Our research indicated that residents of The Woodlands have an extremely high propensity to support the arts given their high education and income levels. The report identified non-residents, families and young adults, and empty-nesters as any new facility's likely audience.
- \* ***PKF Consulting's Market Feasibility Study for the Proposed Houston Museum of Natural Science—The Woodlands:*** This study compared the demographics of Harris County, Montgomery County, South Montgomery County, East Montgomery County, Conroe, and the 10- and 20-mile radii from The Woodlands Parkway and IH-45. It determined that the target market for a satellite museum in The Woodlands would be the population within a 20-mile radius of The Woodlands.



## Defining the market: class act productions ticket buyer data

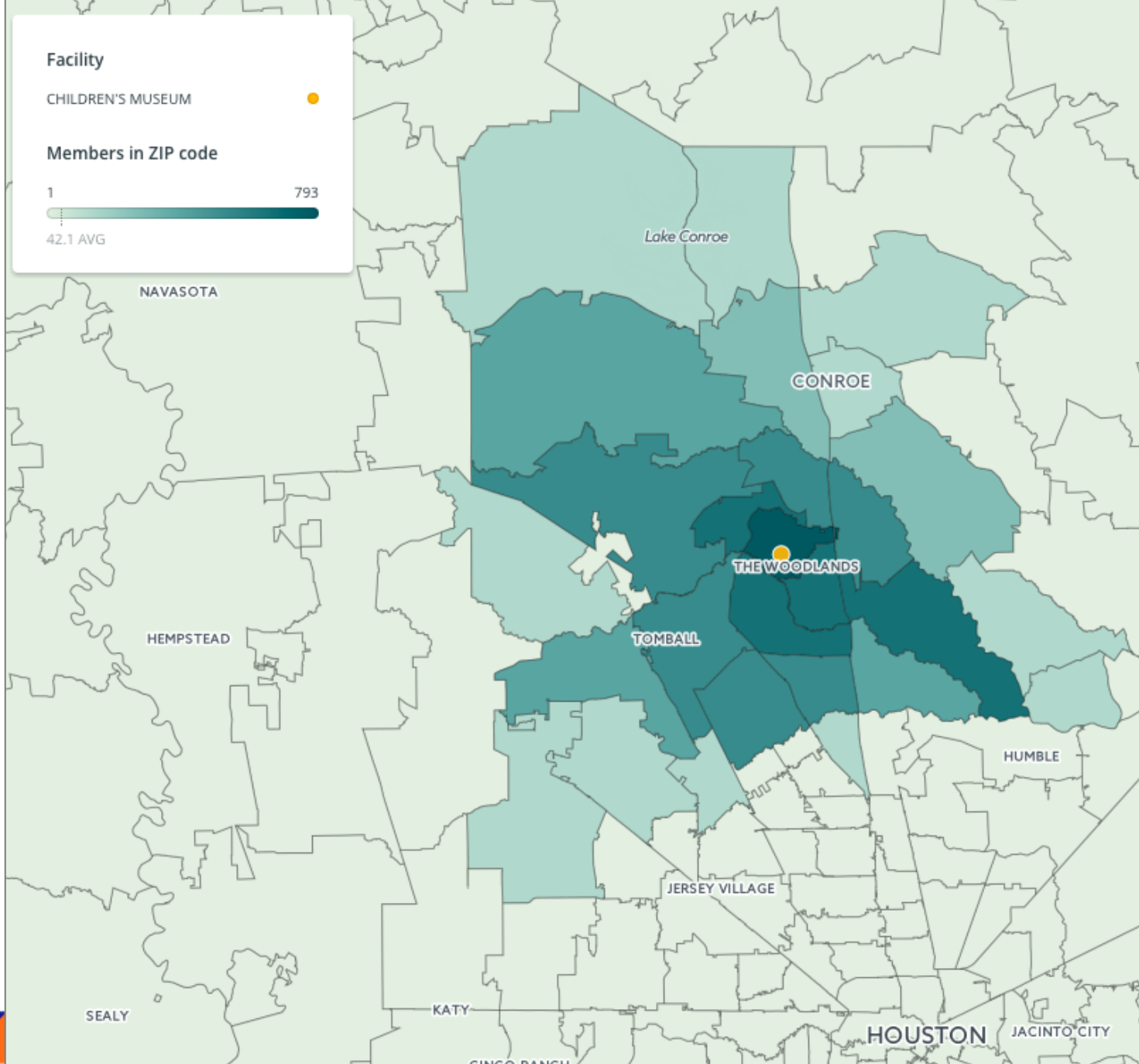
- \* This map indicates Class Act Productions ticket buyers for 2016.
- \* In total, 5,463 addresses were mapped. Of these, 4,982, or 91.2 percent, are within a 20-mile radius of The Woodlands Township Building.





## Defining the market: the woodlands children's museum membership data

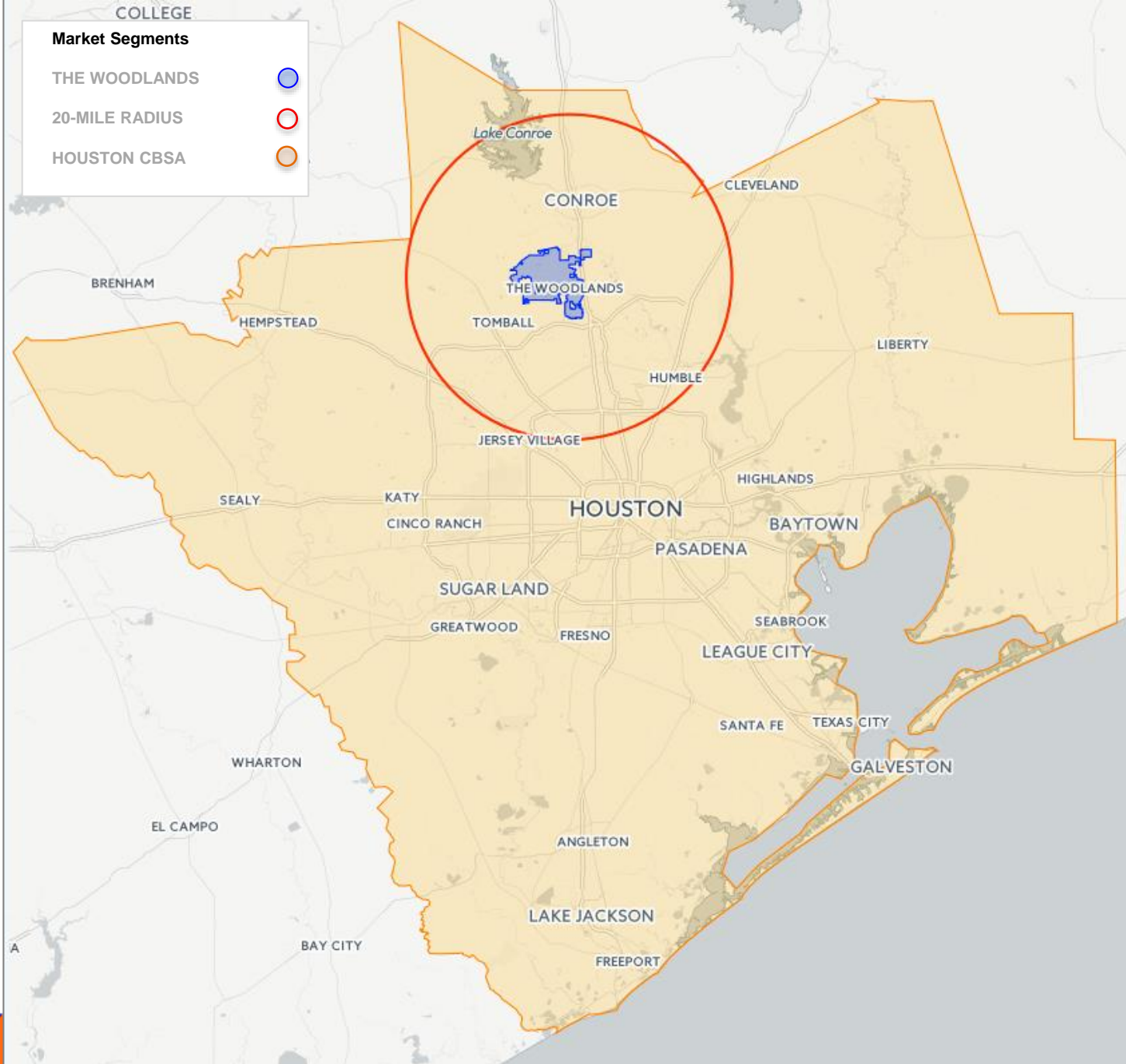
- \* Here, The Woodlands Children's Museum members are mapped according to zip code.
- \* Zip codes 77381, 77382, 77389, and 77386





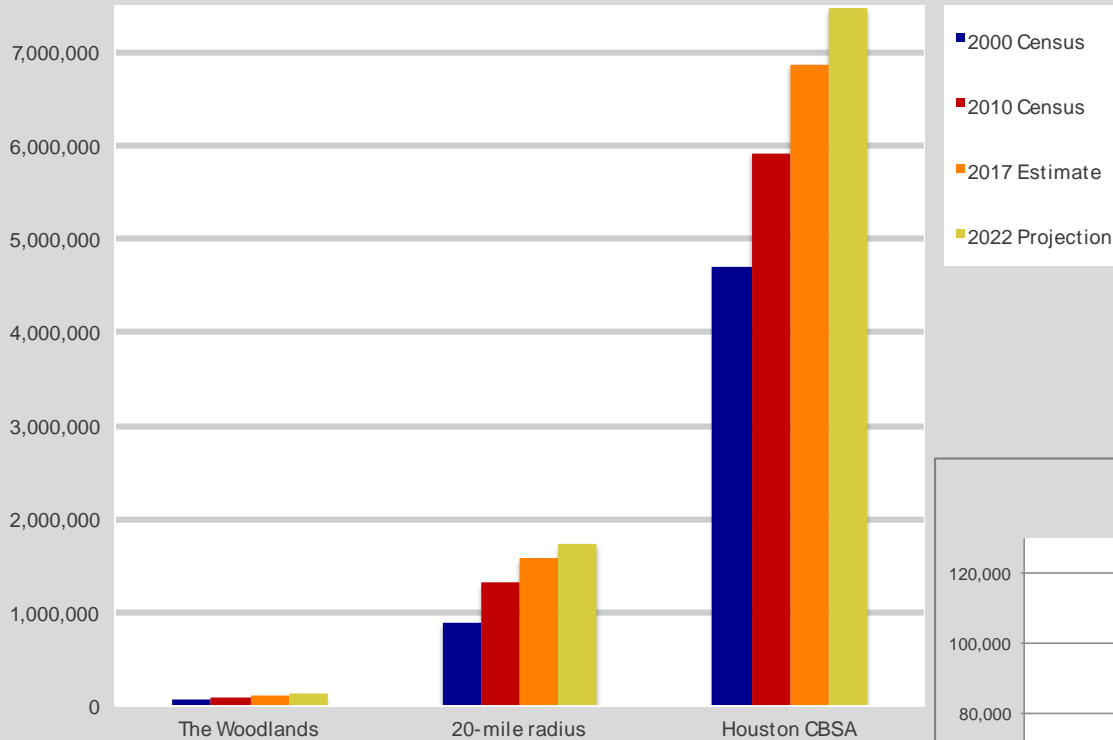
## Defining the market: market segments

- \* **Market Segment 1:**  
The Woodlands Township
- \* **Market Segment 2:** A  
20-mile radius around  
The Woodlands  
Township Building
- \* **Market Segment 3:**  
The Houston Core  
Based Statistical Area  
(A CBSA is a U.S.  
geographic location area  
consisting of one or more  
counties that are anchored  
by an urban center of at  
least 10,000 people plus  
adjacent counties that are  
socioeconomically tied to  
the urban center by  
commuting.)



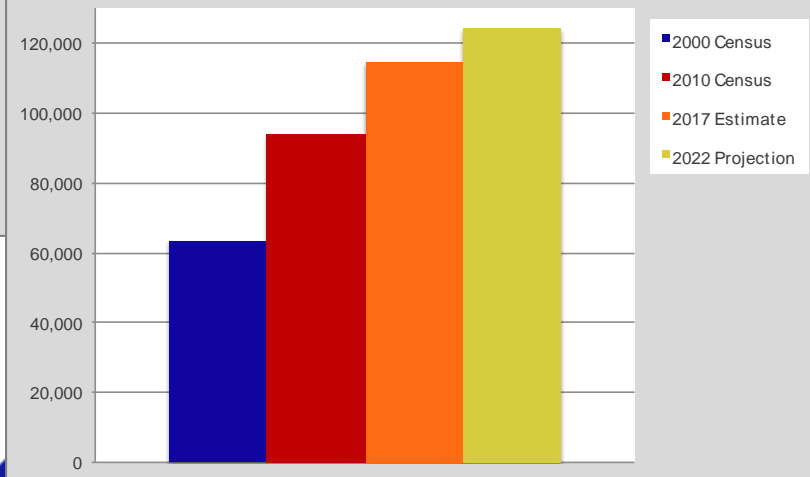
# Market size + growth

**Population: The Woodlands + Regional Markets**



- \* Since 2000, the population in and around The Woodlands has been rapidly growing.
- \* Between 2000 and 2010, The Woodlands population grew by 48 percent. Between 2010 and 2022, it is projected that the population will have grown an additional 30 percent, from 93,847 in 2010 to 124,219 in 2022.
- \* Within the 20-mile radius, there is a similar pattern of growth, with the population projected to reach 1.7 million by 2022.
- \* Although still considerable, population growth is slowest in the Houston CBSA, where it increased by 26 percent between 2000 and 2010 and is projected to increase by 25 percent between 2010 and 2022.

**Population: The Woodlands**



## Market size + growth

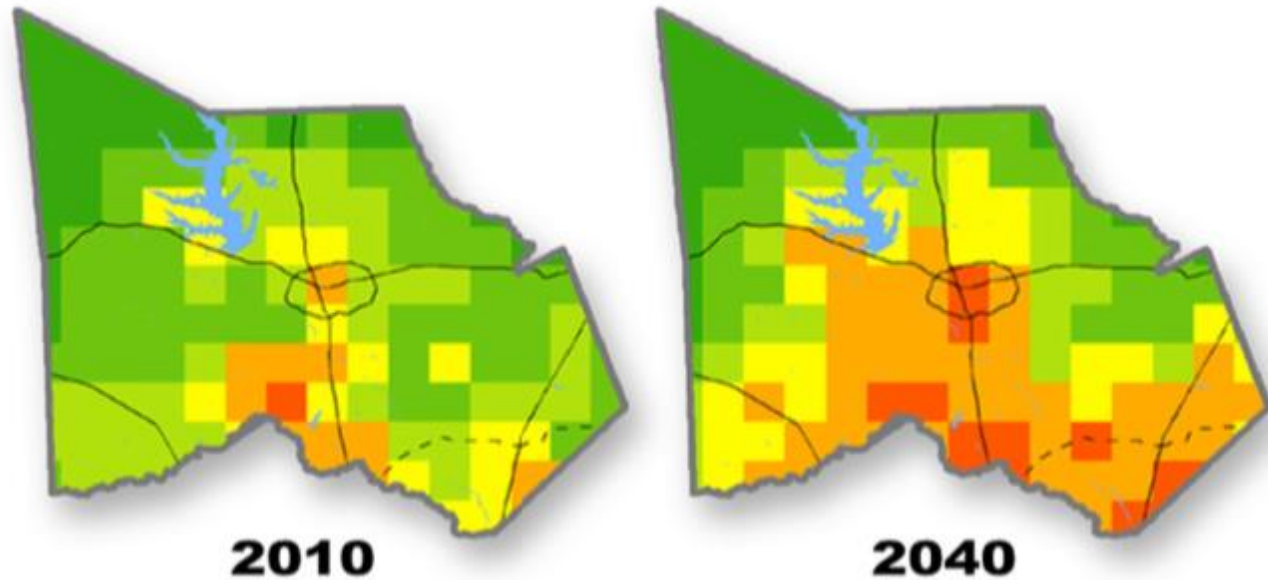


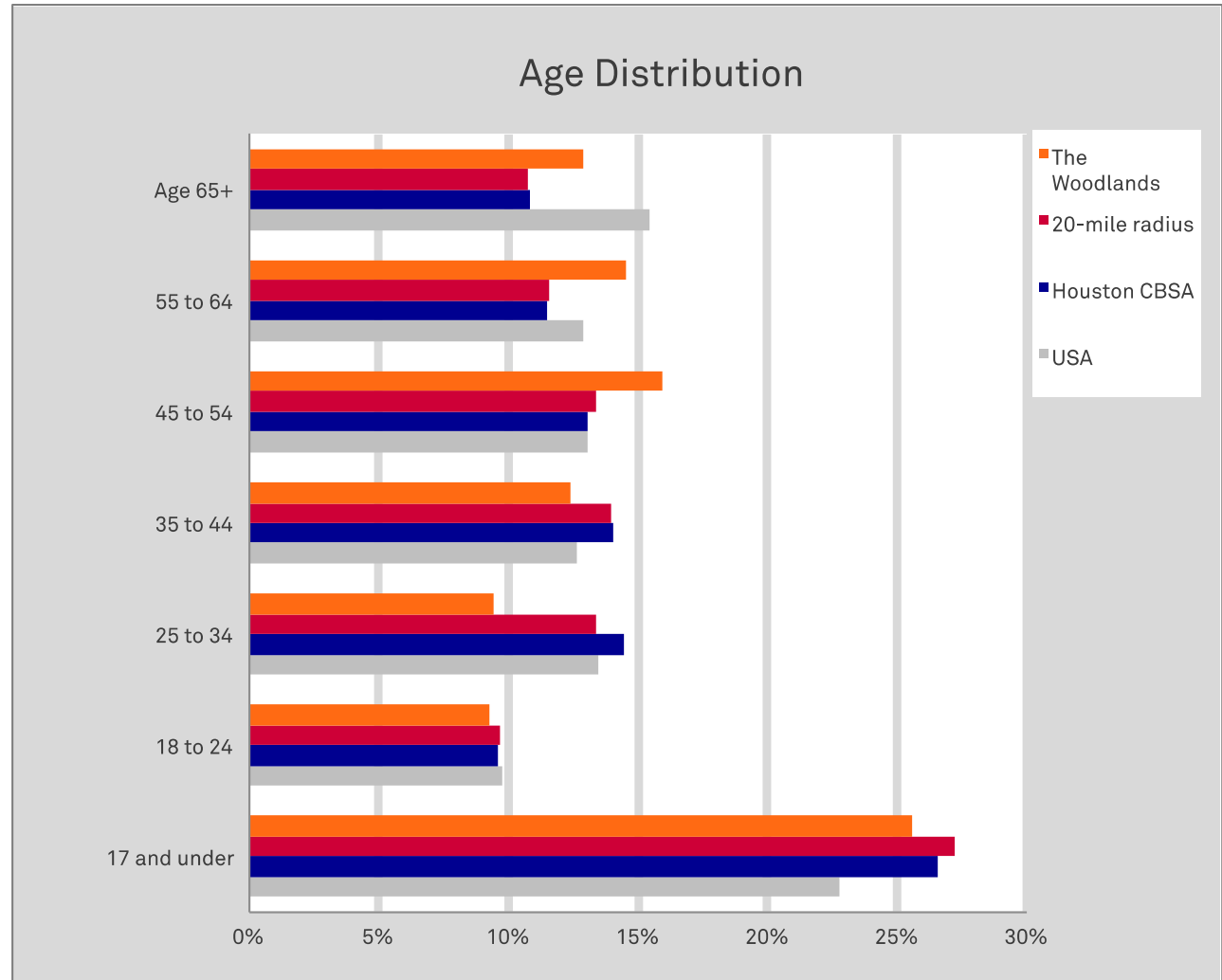
Figure E5: Population Projection Locations

- \* This image, pulled from the **2016 Montgomery County Thoroughfare Plan**, indicates areas of projected population growth in Montgomery County.
- \* Notably, it highlights The Woodlands as a hub within the county, with growth projecting outward from it.



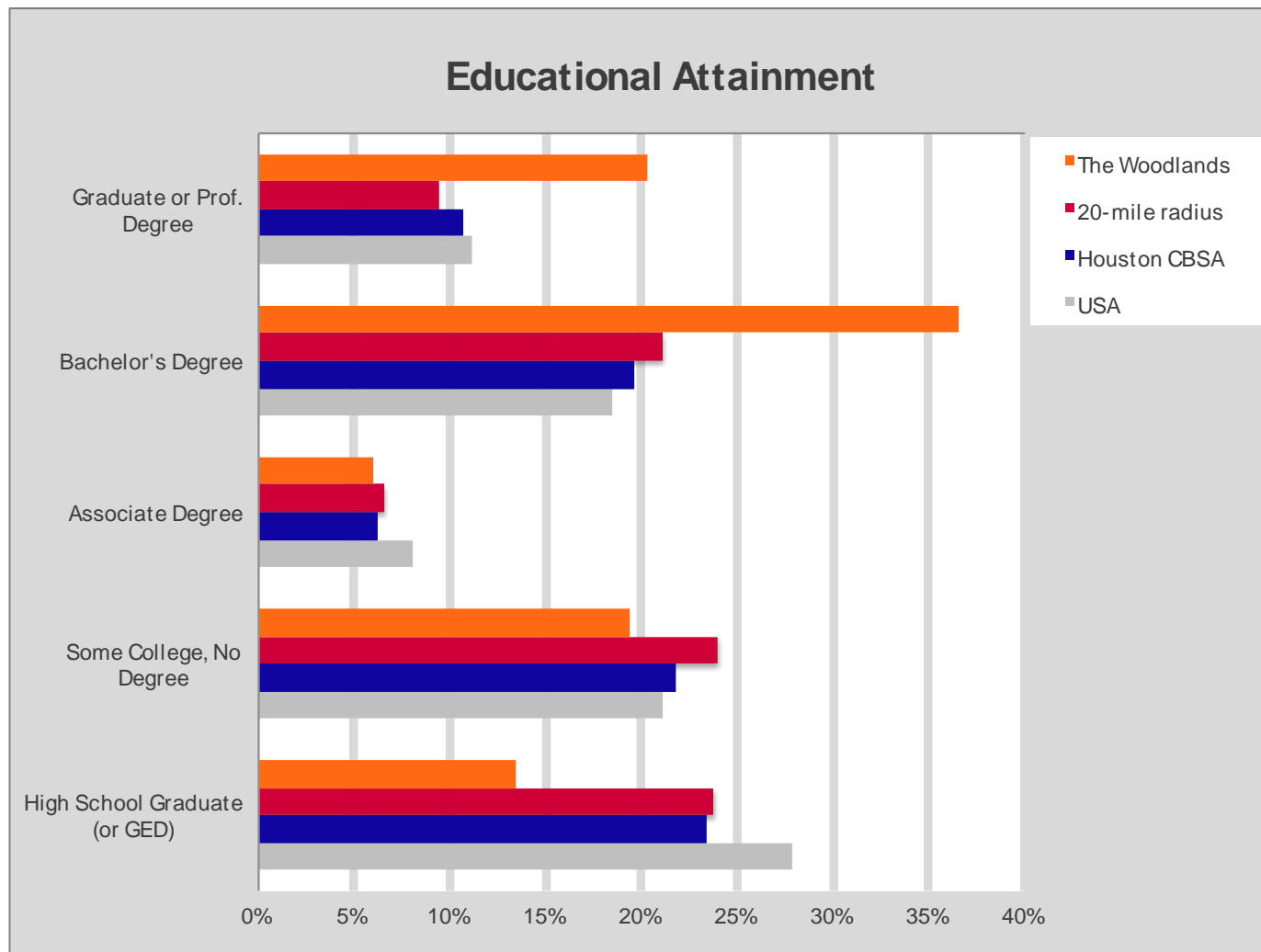
## Market characteristics

- \* In all three market segments, there is diversity in age, although The Woodlands skews slightly older.
- \* The '17 and under' population represents slightly more than one-quarter of the population in each market segment, suggesting a large number of families.
- \* Notably, the '25 to 34' age group represents only 9 percent of the population, compared to 13 percent in the 20-mile radius, 13 percent in the United States, and 14 percent in the Houston CBSA.



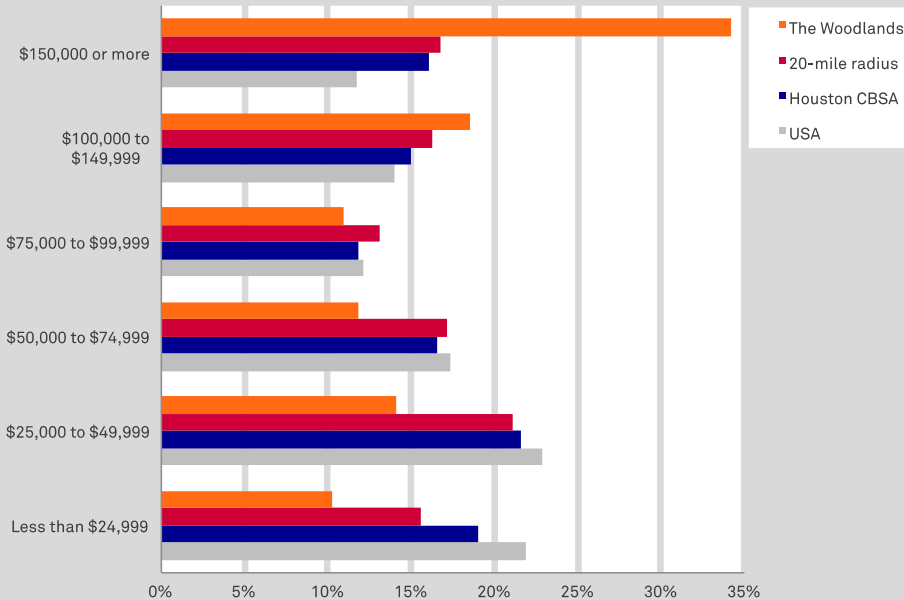
## Market characteristics

- \* The Woodlands market is very well educated: 37 percent of the population has a Bachelor's Degree and 20 percent has a Graduate or Professional Degree.
- \* To compare, only 21 percent of the 20-mile radius and 20 percent of the Houston CBSA have Bachelor's Degrees, and only 9 percent of the 20-mile radius and 11 percent of the Houston CBSA have Graduate or Professional Degrees.
- \* There is however a significant 'Some College, No Degree' population which represents 19 percent of The Woodlands population, 24 percent of the 20-mile radius population, and 22 percent of the Houston CBSA.

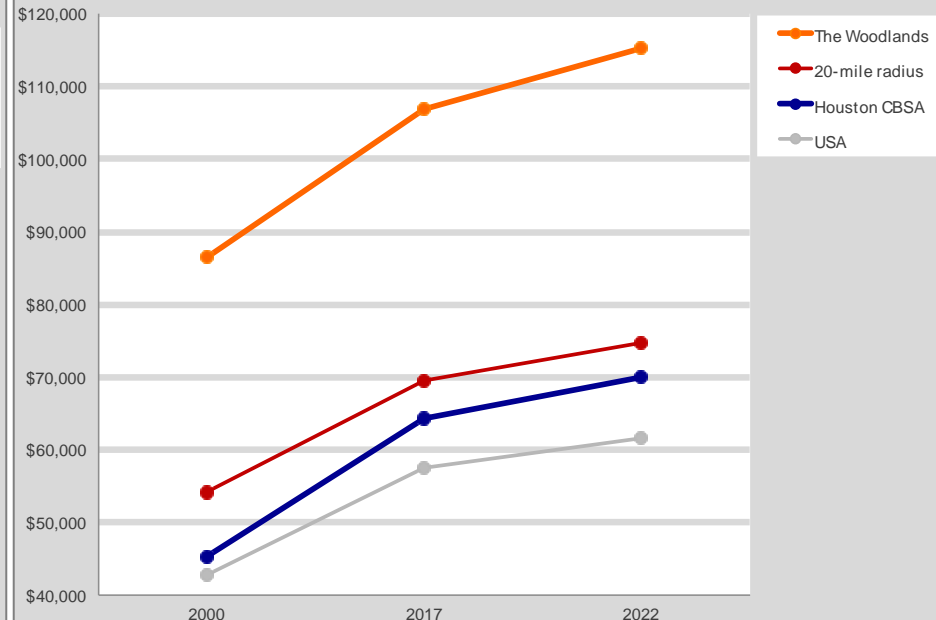


# Market characteristics

Household Income Distribution



Median Household Income

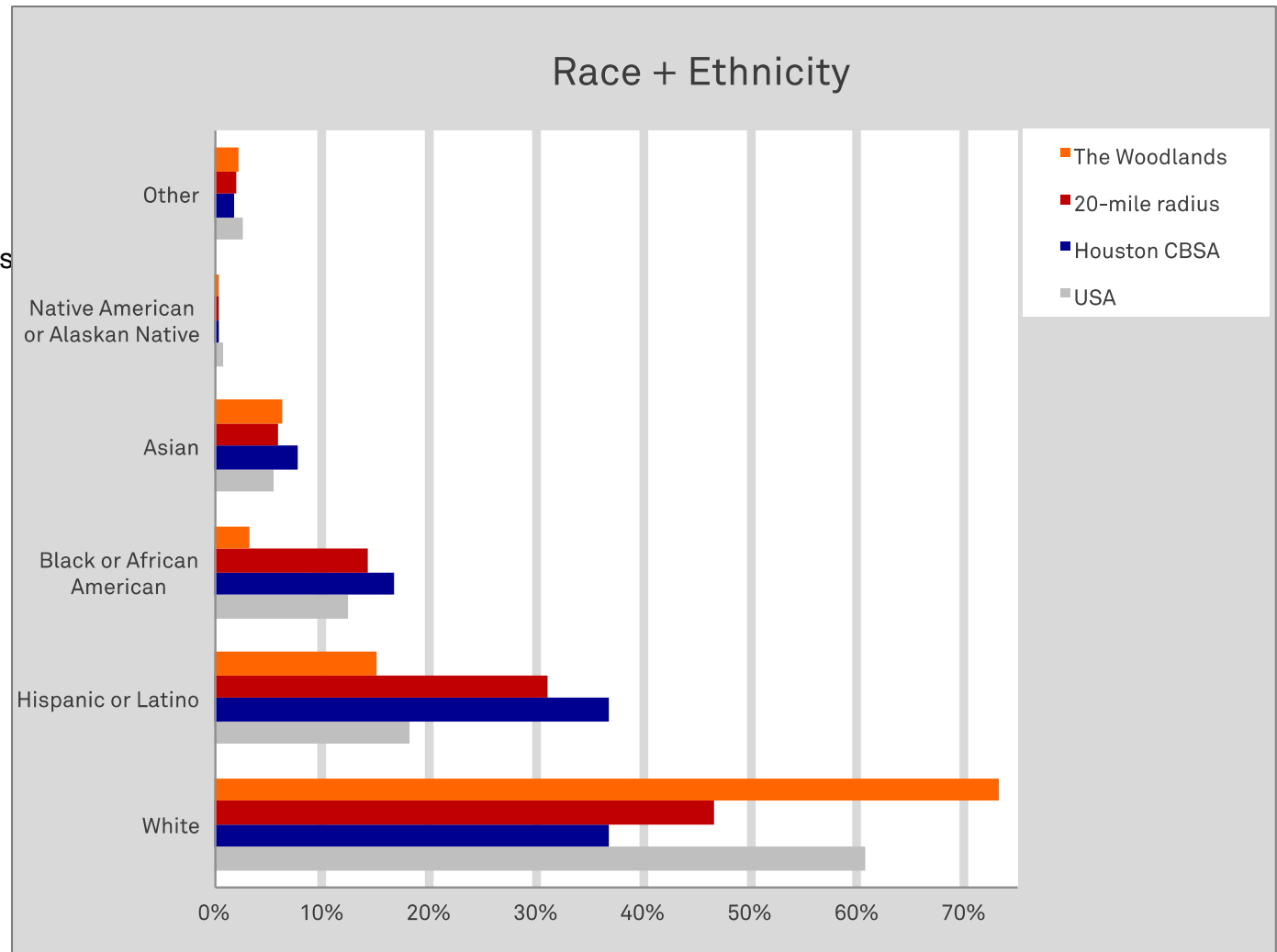


- \* The population in The Woodlands is affluent: 34 percent of the population has a household income of \$150,000 or more, which is well above the national average of 12 percent. In the 20-mile radius, 17 percent of the population falls into this income bracket as does 16 percent of the Houston population.
- \* In the 20-mile radius, 21 percent of the market has an income of \$25,000 to \$49,999. This number is similar in Houston at 22 percent.
- \* Looking at median household income, there is a significant gap between The Woodlands and the regional market segments. For 2017, it is estimated that median household income in The Woodlands is \$106,924. This is projected to increase to \$115,346 by 2022. In the CBSA, the 2017 median household income is estimated at \$64,261 and is projected to increase to \$70,017 by 2022.



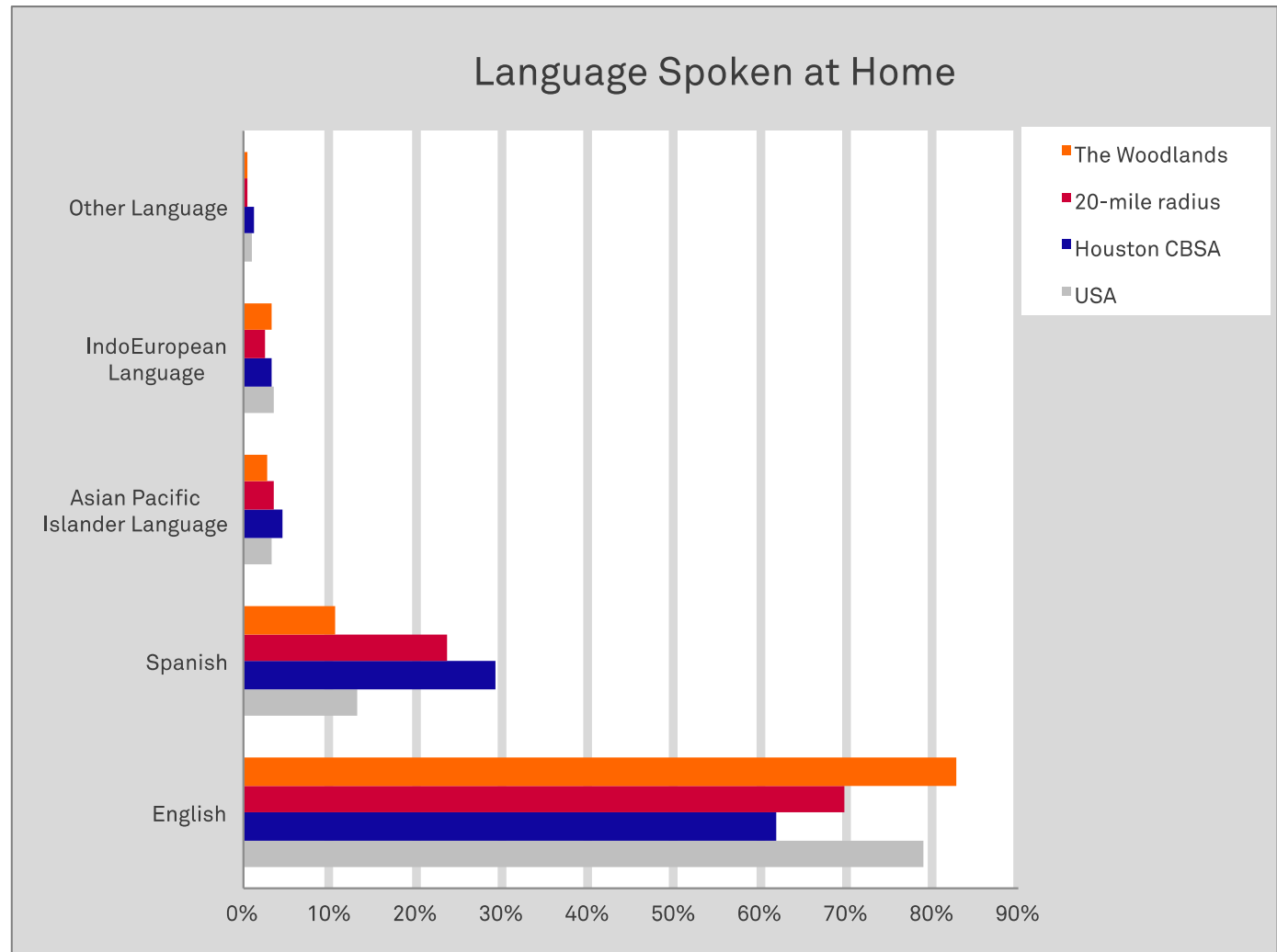
# Market characteristics

- \* Although The Woodlands has a majority White population (73 percent), the regional population is incredibly diverse.
- \* In the 20-mile radius, 31 percent of the population is Hispanic. In the Houston CBSA, this number increases to 37 percent.
- \* The 20-mile radius and Houston CBSA also have notable Black or African American populations: 14 and 17 percent, respectively.
- \* And, in all three market segments, between six and 8 percent of the population is Asian.
- \* Over time, the market is projected to grow increasingly more diverse.



## Market characteristics

- \* In all market segments, English is the primary language spoken at home.
- \* There is, however, a large Spanish speaking population, particularly in the 20-mile radius (24 percent) and the Houston CBSA (29 percent).
- \* In addition, there are pockets of Asian Pacific Islander and Inco-European language speakers.





# Tourists and tourism

- \* According to data collected from The Woodlands Convention and Visitors Bureau (CVB) website, tourism in The Woodlands has:
  - \* Generated \$10.6 million in local tax revenue;
  - \* Generated \$17.1 million in state tax revenue;
  - \* Created \$313 million in total spending; and,
  - \* Created 3,940 jobs in travel and tourism.

In addition, the most common words used by visitors to describe The Woodlands are 'beautiful', 'relaxing', 'fun', 'clean', and 'upscale.'

- \* In 2016, the CVB developed a **Strategic Marketing + Communications Plan**. It identified audience segments for The Woodlands as:
  - \* Business Travelers,
  - \* Meetings Professionals,
  - \* The Sports Market,
  - \* The Leisure Market, and
  - \* Niche Segments (empty nesters, girlfriend getaways, international, etc.).

Target markets were identified as:

- \* Leisure and corporate business travelers within a 150-mile radius of The Woodlands, and
- \* Corporate meeting planners in the Austin and Houston areas.



# Tourists and tourism

- \* In addition, The Woodlands, partnership with The Atkins Group, completed a *Brand Sentiment Research Study* in 2016. The data used for the survey was collected through a series of online focus groups and surveys directed at meeting and event planners, residents, and visitors. Results are as follows:
  - \* Meeting and event planners find The Woodlands' most enticing qualities to be the activities in the area; great meeting space, catering, and staff; cost effectiveness; and it's convenience as a location. Traffic and around The Woodlands, however, was cited as a concern.
  - \* Half of all visitors surveyed indicated that they were "very" or "somewhat" familiar with The Woodlands and many have made more than one trip to the community.
  - \* Shopping and dining are the primary drivers for all visitors, although when asked how suitable The Woodlands is for various types of trips, respondents indicated that it is very well suited for concerts/special events.
  - \* Forty-seven percent of overnight visitors indicated that they attended an event or concert while in town.
  - \* Most respondents view The Woodlands as a short trip/getaway as opposed to a long vacation destination. This last point is of interest as, according to the report, shorter trips are more about escaping the routine of daily lives and recharging than they are about learning or discovering something new.



# Tourists and tourism

- \* Lastly, *The Economic Impact of Travel on Texas , 1994-2015p*, created by Dean Runyan Associates in 2016, indicates the following:
  - \* Total direct travel spending in Texas in 2015 was \$68.7 billion, a 2.2 percent decrease from the previous year.
  - \* State and local tax revenue reach \$6.2 billion in 2015, marking a 4.9 percent increase of 2014;.
  - \* International visitors spent \$6.9 billion in Texas in 2015 (12 percent of all visitor spending).
  - \* United States residents living outside of Texas spent \$25.4 billion (43 percent of all visitor spending).
  - \* For the Houston-Sugar Land-Baytown metropolitan area, travel-generated tax revenue per household in 2015 was \$650.
  - \* In Montgomery County, total tax revenue per household was \$370.
  - \* In the Houston-Sugar Land-Baytown metro area, visitor spending reached \$13.7 million in 2015; of that, \$1.5 million was spent on Arts, Entertainment, and Recreation.



# The AFTA local arts index

- \* The Local Arts Index is a tool launched by Americans for the Arts in 2012 to help understand the characteristics of cultural life of individual communities as measured at the county level.
- \* The Index considers four dimensions:
  - \* **Arts Activity:** Levels of participation and production;
  - \* **Resources:** The flows of arts revenues and organizational resources used in the arts;
  - \* **Competitiveness:** The arts relative to other community economic markers; and,
  - \* **Local Cultural Character:** Attributes of the arts that differentiate places from each other.
- \* The next slide contains highlights from the Index for Montgomery County. For comparison, Median and Average County Indicators have also been included.



# The AFTA local arts index

\* This slide contains highlights from the index for Montgomery County.

\* For comparison, Median and Average County Indicators have also been included.

Americans for the Arts: Local Arts Index (April 2015)	Montgomery County	Median County Indicator Value	Average County Indicator Value
<b>Market Characteristics</b>		<b>National (2015)</b>	
2015 Population estimate	537,559	320,090,857	
Educational attainment: Bach or higher, age 25+	32.2%	29.0%	
Median household income	\$68,838	\$55,551	
<b>Cultural Participation</b>			
Adult population share playing musical instrument, 2012-14	11.9%	11.6%	11.8%
Adult population share attending live performing arts, 2012-14	19.9%	20.4%	20.1%
Adult population share attending popular entertainment, 2012-14	30.3%	11.2%	12.5%
Adult population share visiting art museums, 2012-14	12.1%	11.2%	12.4%
Overall participation in arts + culture activities 100=1 activity/year/person, 2012-14	183.0	144.0	144.6
<b>Cultural Programming</b>			
Total nonprofit arts expenditures per capita, 2009	\$60.71	\$16.93	\$58.18
Total nonprofit arts expenditures per capita, 2010	\$68.32	\$17.05	\$59.18
Total nonprofit arts expenditures per capita, 2012	\$52.68	\$17.05	\$59.18
<b>Consumer Expenditures</b>			
Estimated expenditure on admission fees per capita, 2015	\$35.26	\$22.40	\$23.14
Estimated expenditures on recorded media per capita, 2015	\$59.96	\$56.62	\$58.33
Estimated expenditures on musical instruments per capita, 2015	\$15.15	\$9.46	\$10.01
Total estimated selected expenditures per capita, 2015	\$403.73	\$343.05	\$345.93
<b>Artists + Arts Businesses</b>			
Solo artists per 100,000 population, 2009	139.33	113.70	147.60
Solo artists per 100,000 population, 2011	140.40	121.89	157.22
Solo artists per 100,000 population, 2012	145.4	121.89	157.2
Solo artists per 100,000 population, 2013	155.1	121.53	156.9
"Creative Industries" businesses per 100,000 population, 2009	309.60	163.50	188.60
"Creative Industries" businesses per 100,000 population, 2013	235.85	1134.50	155.22
"Creative Industries" businesses per 100,000 population, 2014	223.19	122.97	157.22
<b>Arts Nonprofits</b>			
Total nonprofit arts organizations per 100,000 population, 2012	4.33	12.51	18.07
Arts education organizations per 100,000, 2012	0.41	1.49	3.00
Collections-based nonprofit organizations per 100,000 population, 2012	1.24	3.86	6.34
Humanities + heritage nonprofit organizations per 100,000 population, 2012	0.41	3.96	7.02
Media arts nonprofit organizations per 100,000 population, 2012	0.00	1.60	3.00
Performing arts nonprofit organizations per 100,000 population, 2012	1.44	4.06	6.01
Field service arts nonprofit organizations per 100,000 population, 2012	0.62	2.54	4.43
Visual arts nonprofit organizations services per 100,000 population, 2012	0.21	1.50	3.10
Museums per 100,000 population, 2015	3.01	15.80	26.30
Public libraries per 100,000 population, 2012	1.40	10.60	18.70



# The AFTA local arts index: conclusions

- \* Compared to the Median and Average County Indicator Values, overall participation in arts and cultural activities in Montgomery County is high. When it comes to popular entertainment, 30.3 percent of the adult population in Montgomery County attends compared to an Average County Indicator Value of 12.5 percent. The percentage of adults attending live performing arts in Montgomery County, however, lags slightly behind the Median and Average County Indicators: 19.9 percent attend in Montgomery County compared to a Median of 20.4 percent and Average of 20.1 percent.
- \* Until 2012, total nonprofit arts expenditures were considerably higher than the Median and Average County Indicator Values. Between 2010 and 2012, however, total nonprofit arts expenditures dropped from \$68.32 to \$52.68. To compare, the Average County Indicator Value in 2012 was \$59.18.
- \* Consumer expenditures on the arts in Montgomery County are well above the Median and Average County Indicator Values, particularly when it comes to admission fees (estimated at \$35.26 per capita for 2015 compared to a median of \$22.40 and average of \$23.14).
- \* Between 2009 and 2013, it is estimated that the number of solo artists per 100,000 population has increased from 139.33 to 155.07. The number of “Creative Industries” businesses, however, is estimated to have decreased from 309.60 in 2009 to 223.19 in 2014. The trends in both of these categories are on par with trends in the Median and Average County Indicator Values.
- \* As of 2012, the total number of nonprofit arts organizations in Montgomery County per 100,000 population (4.33) was considerably lower than the Median and Average County Indicator Values (12.51 and 18.07, respectively). The same is true of the number of arts education organizations, collections-based nonprofit organizations, humanities and heritage nonprofit organizations, media arts nonprofit organizations, performing arts nonprofit organizations, field service arts nonprofit organizations, visual arts nonprofit organizations, museums, and public libraries per 100,000 population.



## Market conclusions

- \* The market for the arts is large and growing.
- \* In The Woodlands, the population is well-educated and affluent, both of which indicate a propensity to support the traditional performing arts.
- \* Regionally, the population is somewhat more diverse, indicating opportunities for a mix of traditional and non-traditional arts and cultural programs.
- \* Each market segment has a large '17 and under' population, indicating opportunities for family programming.
- \* There is also considerable diversity, indicating opportunities for culturally specific programs.
- \* Tourism in The Woodlands generates \$10.6 million in local tax revenue. Many visitors travel to The Woodlands to shop or eat out. Others consider the community a short trip or getaway destination and indicated its suitability for conventions, corporate meetings, concerts and events.
- \* Montgomery County has a population that attends and spends more on the arts and entertainment than other areas, but the actual number of arts and cultural organizations is well below national averages.



# Community survey





# Community survey

## Overview

- \* The **Cultural Arts Survey** was designed to collect community input on the arts and culture in The Woodlands Township. Available online, the survey was comprised of 24 multiple choice and free-text questions and was open for responses from February 2 through February 27, 2017.
- \* Questions focused on how and where the community participates in the arts, whether or not they feel new arts and cultural facilities in The Woodlands are needed, and the role they feel arts and culture should play in the community.

## Methodology

- \* The Woodlands Township was responsible for distributing the survey, which was done via:
  - \* Twitter, Facebook boosts, Facebook advertising + Instagram;
  - \* The Woodlands Township Website;
  - \* Press Release;
  - \* The Talk of the Town eNewsletter; and,
  - \* Other Local News Coverage (*Woodlands Online, Community Impact Newspaper, The Paper Magazine, Houston Chronicle*).
- \* In total, there were 1,422 survey responses. That number, however, decreased to 1,270 when incomplete surveys were removed from the data.
  - \* Of those responses, 1,165 were completed by residents with The Woodlands zip codes (as defined on the Township website).
  - \* Other zip codes that frequently appeared represented the areas of Spring, Conroe, and Montgomery.



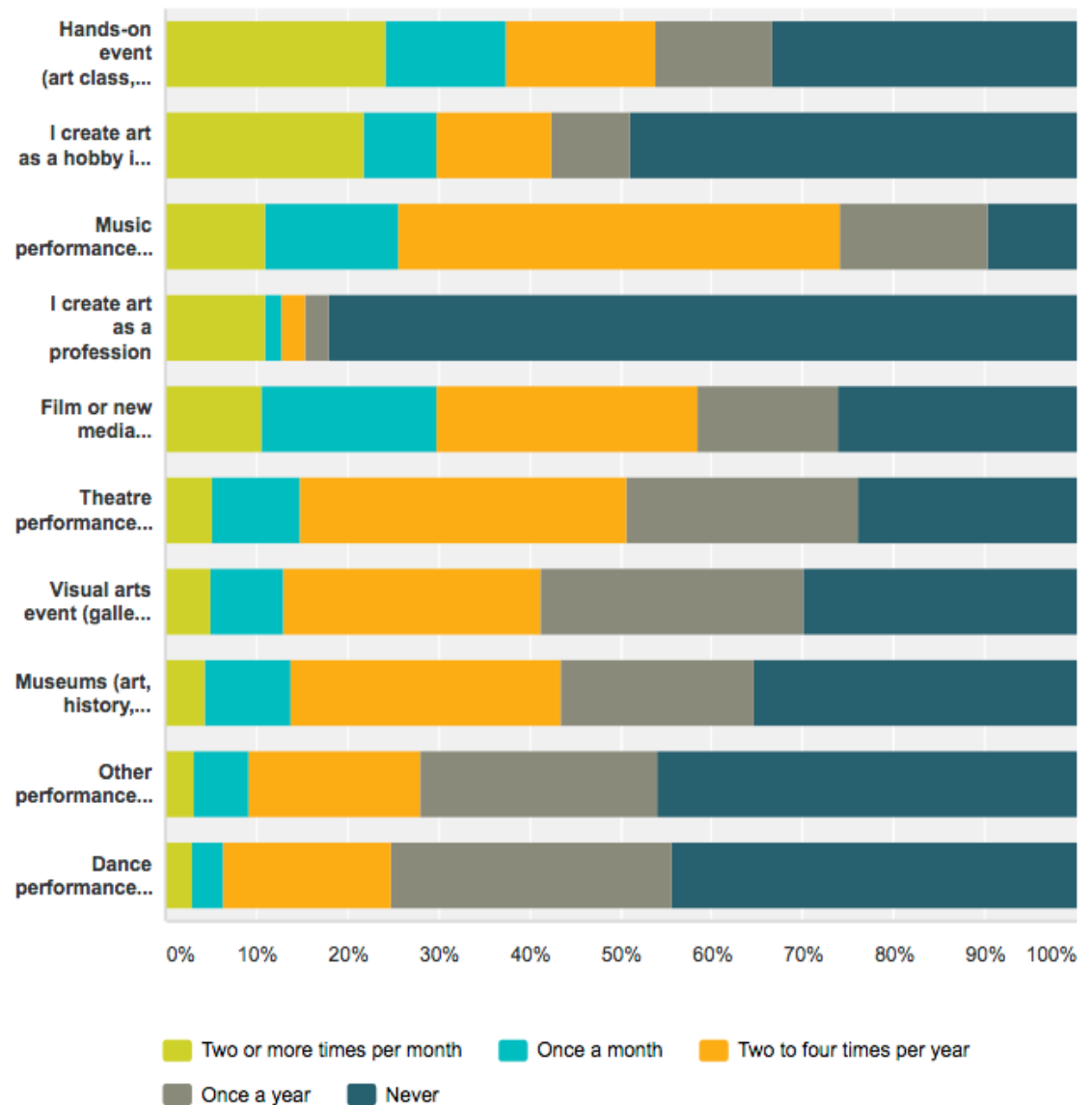
## Results: Arts Participation in The Woodlands

- \* When asked what types of cultural events respondents attend in The Woodlands and how often, 48.52 percent of survey respondents answered that they attend a music performance two to four times per year. An additional 35.85 percent of survey respondents answered that they attend a theatre performance two to four times per year.
- \* Conversely, 81.99 percent of survey respondents indicated that they never create art as a profession.
- \* The majority of respondents indicated that they participate in these events at the following venues:
  - \* Cynthia Woods Mitchell Pavilion (88.54%),
  - \* Market Street (62.85%),
  - \* Woodlands Waterway Art Festival (62.26%).



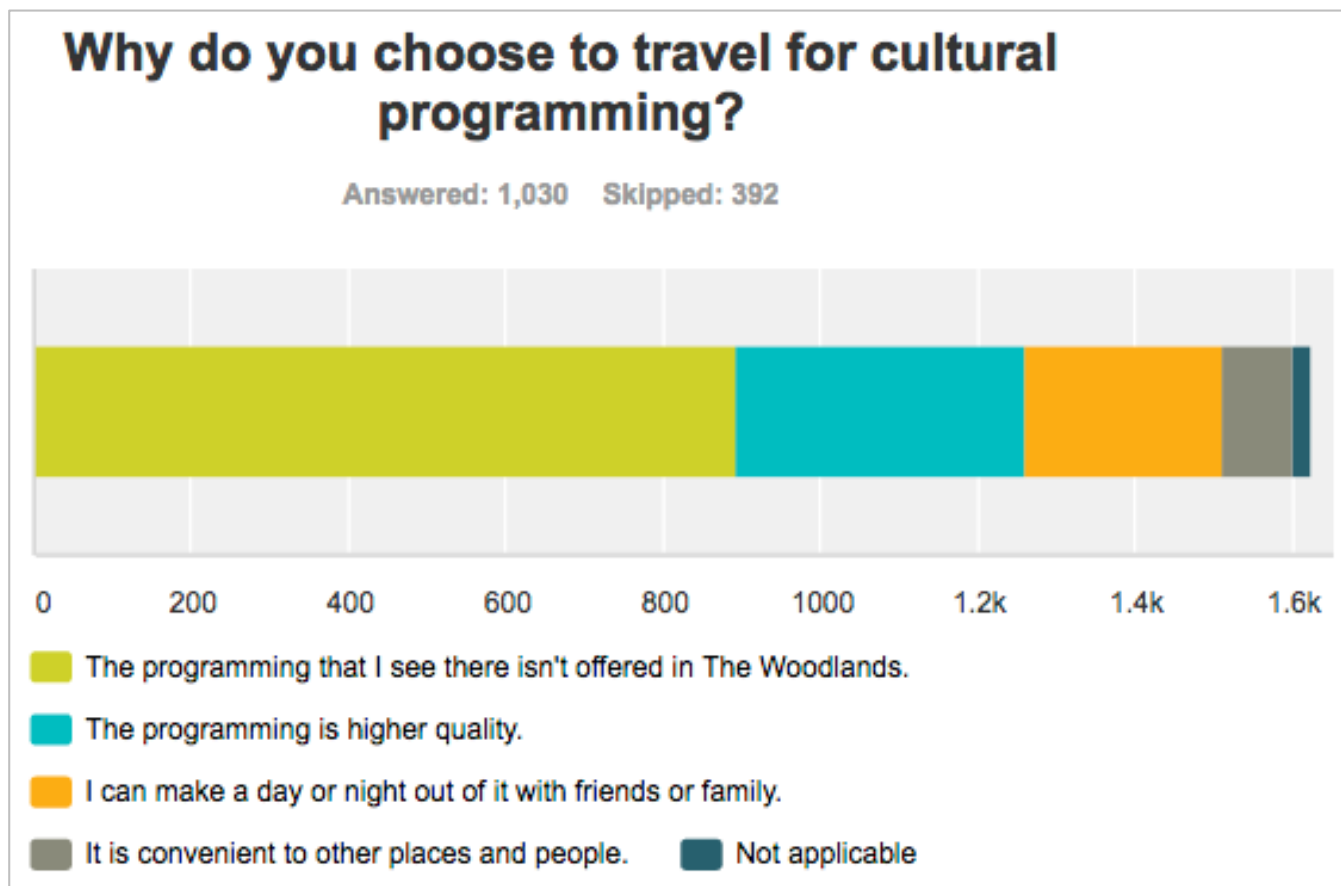
### What types of cultural events do you attend in The Woodlands and how often?

Answered: 1,269 Skipped: 153



## Results: Arts Participation Outside of The Woodlands

- \* The majority of survey respondents (84.26 percent) indicated that they attend cultural programming outside of The Woodlands.
- \* Of those:
  - \* 50.76 percent indicated that they attend cultural programming outside of The Woodlands 2 to 4 times a year; and,
  - \* 23.24 percent indicated that they attend cultural programming outside of The Woodlands once a month.
- \* The majority of respondents choose to travel for cultural programming because what they want to see is not offered in The Woodlands (86.80 percent).

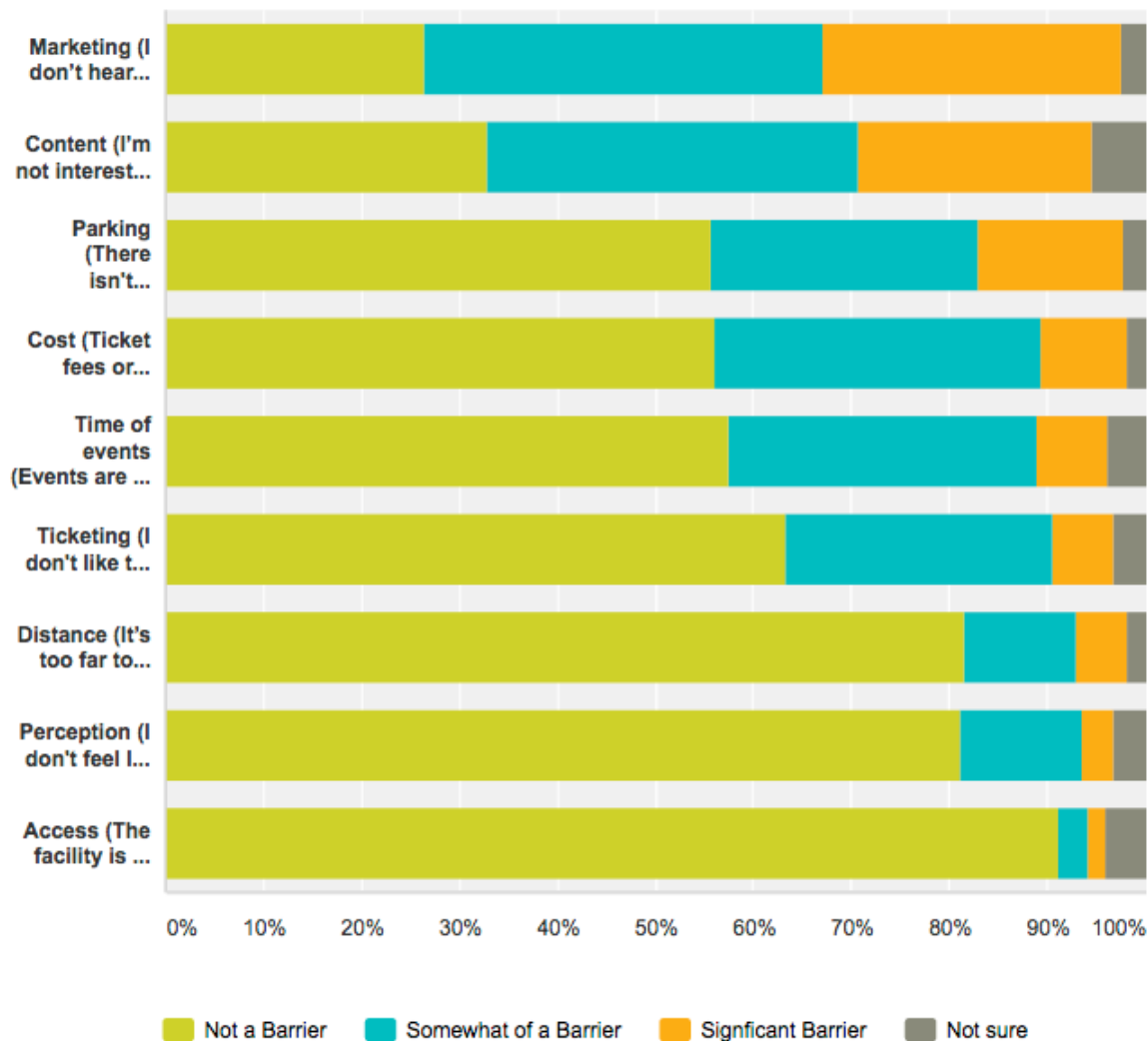


## Results: Barriers to Participation

- \* When it comes to the barriers that impact an individual's ability to participate in the arts, 30.50 percent of survey respondents indicated that 'Marketing (I don't hear about events at all or until it's too late to plan)' is a significant barrier and 40.74 percent indicated that it is somewhat of a barrier.
- \* Further, 23.67 percent of respondents indicated that 'Content (I'm not interested in what is offered)' is a significant barrier to participation, and 38.00 percent indicated that it is somewhat of a barrier.
- \* 'Access (The facility is not ADA compliant...)', 'Distance (It's too far to drive...)', and 'Perception (I don't feel like the space is for me...)' are not perceived as barriers to participation to the majority of survey respondents.

### To what extent do the following factors pose a barrier to your participation in arts and cultural programming in The Woodlands?

Answered: 1,217 Skipped: 205



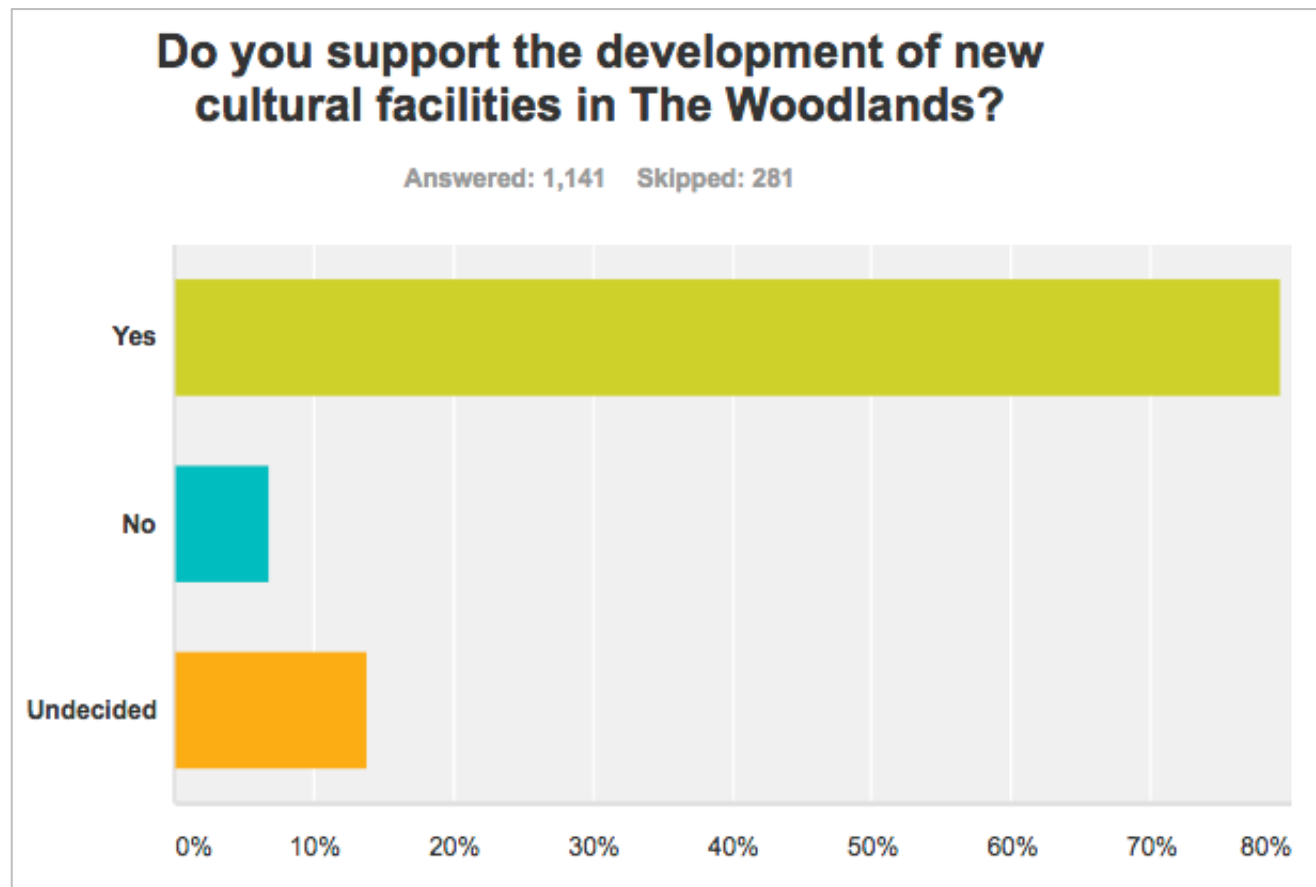
# Results: Cultural Development in The Woodlands

- ✧ When asked whether or not they agree with the statement, “The Woodlands would benefit from additional arts and cultural programming,” 60.09 percent of survey respondents indicated that they strongly agree.
- ✧ When asked what types of cultural offerings and activities or arts education programs are needed in The Woodlands, respondents answered that the following are definitely needed:
  - ✧ Plays (52.98%),
  - ✧ Broadway on Tour (51.61%),
  - ✧ Musical Theatre (48.51%),
  - ✧ Music (45.56%),
  - ✧ Local and/or Regional Theatre Companies (44.17%),
  - ✧ Museums—Science + Nature (41.80%),
  - ✧ Work by Local Artists (39.91%),
  - ✧ Community-wide Festivals + Events (38.07%),
  - ✧ Visual Art Exhibitions (36.72%),
  - ✧ Family Events (36.15%), and
  - ✧ Museums—History (36.15%).



# Results: Cultural Development in The Woodlands

- \* There is strong support for the development of new cultural facilities in The Woodlands, as can be seen in the graph at right.
- \* However, free text responses revealed that there is some resistance to a project that will increase property taxes and a distaste for spending money on the arts.
- \* For example, the survey asked that participants provide other thoughts on the need for particular types of arts and cultural offerings in the community. In total 340 respondents supplied input. Of those, 27 respondents answered that they either did not want their property taxes to increase or did not think public money should be spent on the arts. (Some of these answers are included on the next page.)



# Results: Cultural Development in The Woodlands

- \* When asked about additional thoughts on the need for particular types of cultural offerings and activities or arts education programs in The Woodlands, 340 respondents provided a free-text response. A sampling of those responses have been included here:
  - \* “The Woodlands NEEDS an independent book store! Great place to foster love of literary arts, offer artisan workshops and lectures, readings, children's theater, etc. Also, more indie cafes with live music.”
  - \* “I would object to using tax \$ to fund or subsidize workshops and classes in the arts. If there is a market for classes and workshops, let the free market provide them.”
  - \* “Due to what seems like limited space available in the woodlands to provide multiple spaces for each area of interest, I think one large cultural/performing arts venue that could be used by multiple groups would benefit the community best. Meeting rooms for classes/programs/lectures, a hall w/stage for performances, studio space and the halls and open areas could be used to display art.
  - \* “We are rich in culture if you look outside The Woodlands. We are too small to burden our community with more expense.”
  - \* “Indoor venue for the all the arts plus workshop space. Place to go at night and weekends for entertainment that's a smaller venue than the Pavilion. Make drinks and food available to take into the theatre.”
  - \* “Hispanic heritage month celebration. Multicultural celebration of the woodlands with traditional dances, food, music celebrate the diversity that we have and make everybody feel welcome.”
  - \* “There are so many people from different places around the world in this community, it could provide a great opportunity to celebrate and bring us together in a meaningful way. I usually think of downtown Houston first for cultural opportunities because there aren't a lot here even though I think the demand is!”
  - \* “Don't try to be Houston; consider recognizing and promoting local art-local meaning Montgomery County, surrounding counties and Texas. Build on our community strengths and the art, theatre and music programs within CISD! Are there opportunities to bring local musical theatre acts to the pavilion on non-peak nights?”

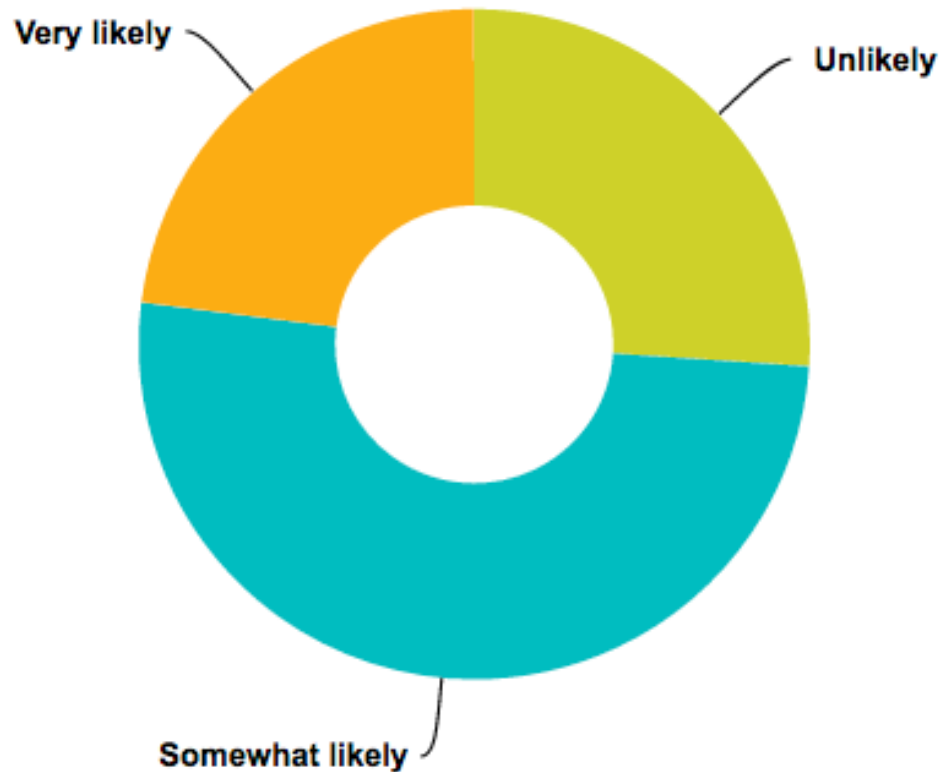


## Results: Cultural Development in The Woodlands

- \* When asked about their likelihood to financially contribute to the development/construction and/or ongoing operation of new arts and cultural facilities, 50.96 percent of survey respondents indicated that they are 'Somewhat likely.'
- \* Twenty-six percent of respondents indicated that they are unlikely to financially support such a project and 22.98 percent indicated that they are very likely to provide financial support.

**If the development of new arts and cultural facilities in The Woodlands is found to be feasible, how likely would you be to contribute financially to their development/construction and/or ongoing operation?**

Answered: 1,140 Skipped: 282





## Results: Cultural Development in The Woodlands

- \* More than half of survey respondents (63.90 percent) of are in support of developing facilities and services that support the creative process of artists and arts organizations. (Eighteen percent are not in support of such development and 18.09 percent are unsure.)
- \* When asked about support for developing facilities and programs that focus on multi-media arts and technology, 59.23 percent of survey respondents indicated that they are in favor of such development. (Nineteen percent are not in support of such development and 21.96 percent are unsure.)
- \* It is very important to survey respondents that arts and cultural activity in The Woodlands support 'Quality of Life/Livability' (62.36 percent), 'Social Interaction' (47.55 percent), 'Our Arts Reputation' (46.37 percent), 'Community Identity' (46.00 percent), 'Local Artists' (43.08 percent), and 'New Artists' (40.47 percent).



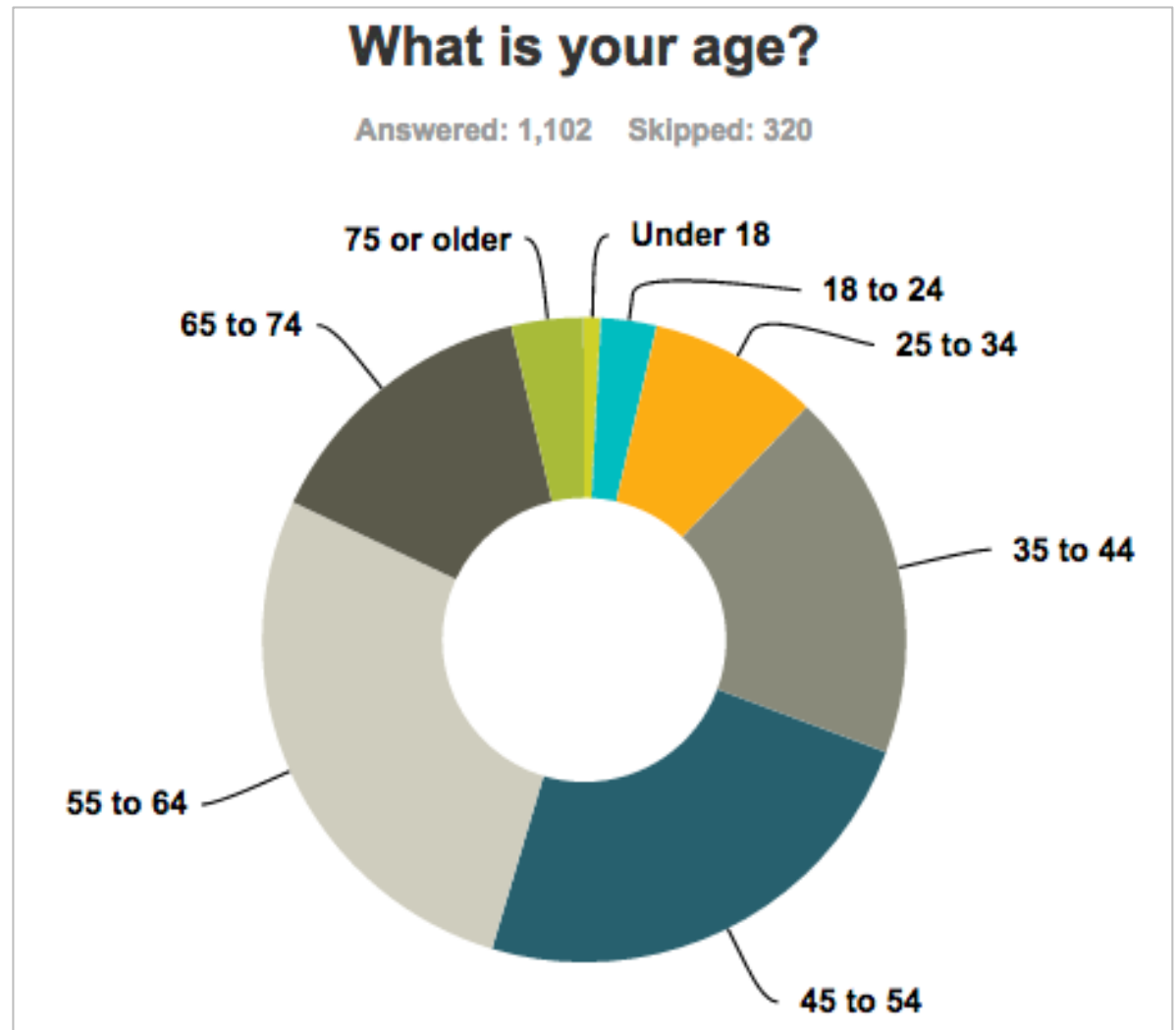
# Results: Cultural Development in The Woodlands

- \* When asked to provide additional thoughts or comments on the arts in The Woodlands, 108 respondents left free-text comments, including:
  - \* “The Woodlands should take advantage of all that we have to offer to the larger community and draw people in. The Arts can do that as well and while here people will spend money. This helps the town and my taxes!”
  - \* “It would be great if these types of studios would be available to artists. HOWEVER, I do not believe that this should be provided via tax dollars. It seems more like a business venture. I would be fine w creating a studio space that would charge and eventually pay for itself. Our kids have excellent art programs at school. And adults should pay their own way. Lastly, we have too many events bringing in more people. I am not interested in things to bring in more. I am interested in supporting those who live here.”
  - \* “Multicultural, international. Our events should represent and welcome our diverse community.”
  - \* “I have lived in The Woodlands for over twenty years and I think too much is geared toward tourism instead of for the residents to enjoy.”
  - \* “The Woodlands would benefit most if it would participate in a larger regional concept that would be attractive to more than just Woodlands residents. There is enough local emphasis already, but more major, major, co-ordinated efforts must occur to bring in professional touring shows ideal for a 1200 seat venue, and it must be regional for easier access for the entire county. Lone Star College would be the most logical host for this concept. Please don't insist on keeping these efforts inside TW. Think big.”
  - \* “Tax dollars should be spent on infrastructure and police services. Art and culture should be funded thru private donations not tax dollars.”
  - \* “A museum about the history of this area (the lumber mills, etc.) that also presents forest preservation as a need for the future would be great.”
  - \* “Absolutely astonishing that a community the size and education of its populous would NOT have an arts/theatre district. Having to travel into Houston is ridiculous. The "new" ice rink is an example of NOT listening to the residents.”



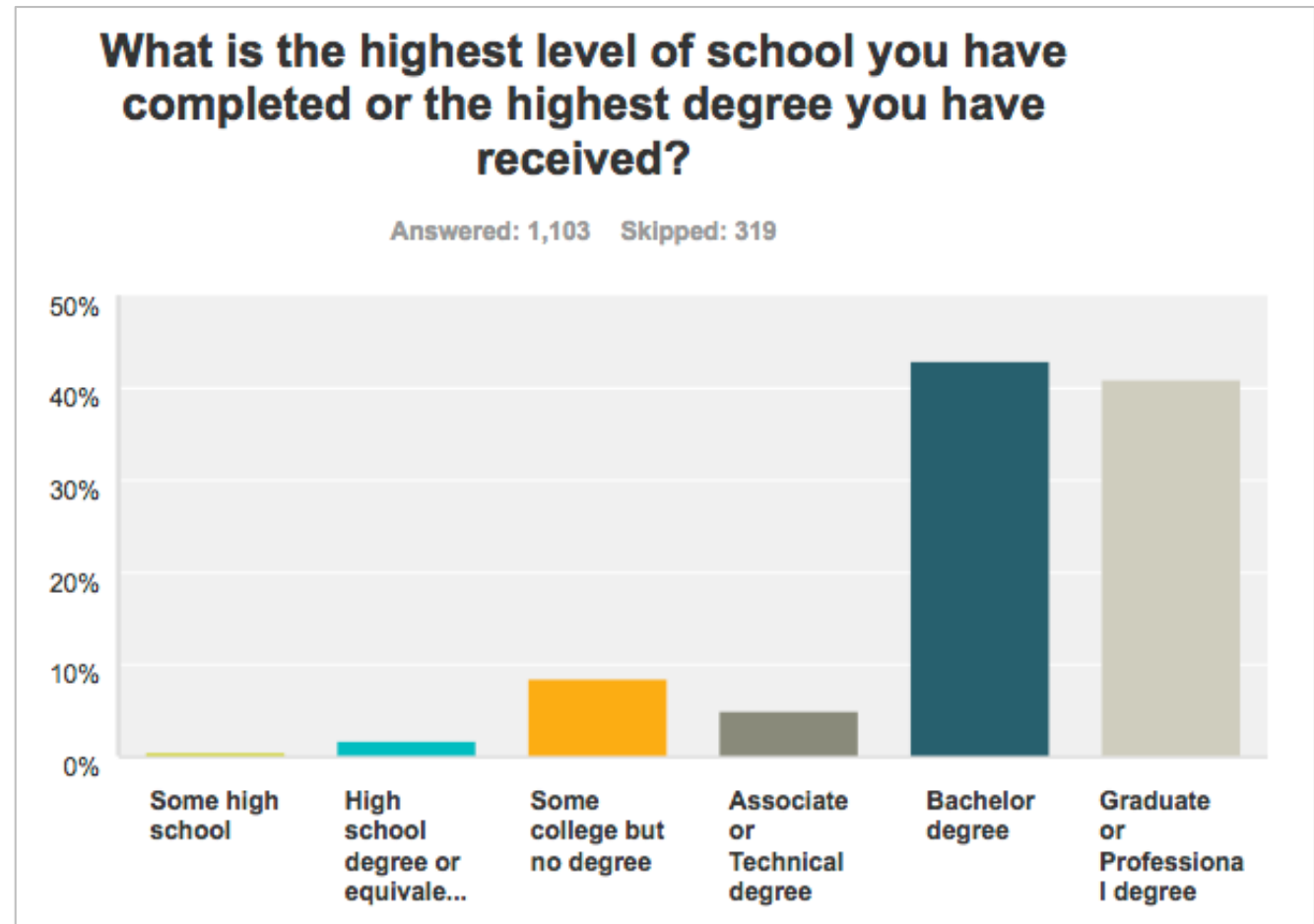
## Results: Respondent Characteristics

- \* The following slides consider the demographics of survey respondents.
- \* The graph at right indicates that respondents represented a variety of age groups:
  - \* 55 to 64: 27.40%
  - \* 45 to 54: 23.96%
  - \* 35 to 44: 18.51%
  - \* 65 to 74: 14.34%
  - \* 25 to 34: 8.53%
  - \* 75 or older: 3.63%
  - \* 18 to 24: 2.81%
  - \* Under 18: 0.82%



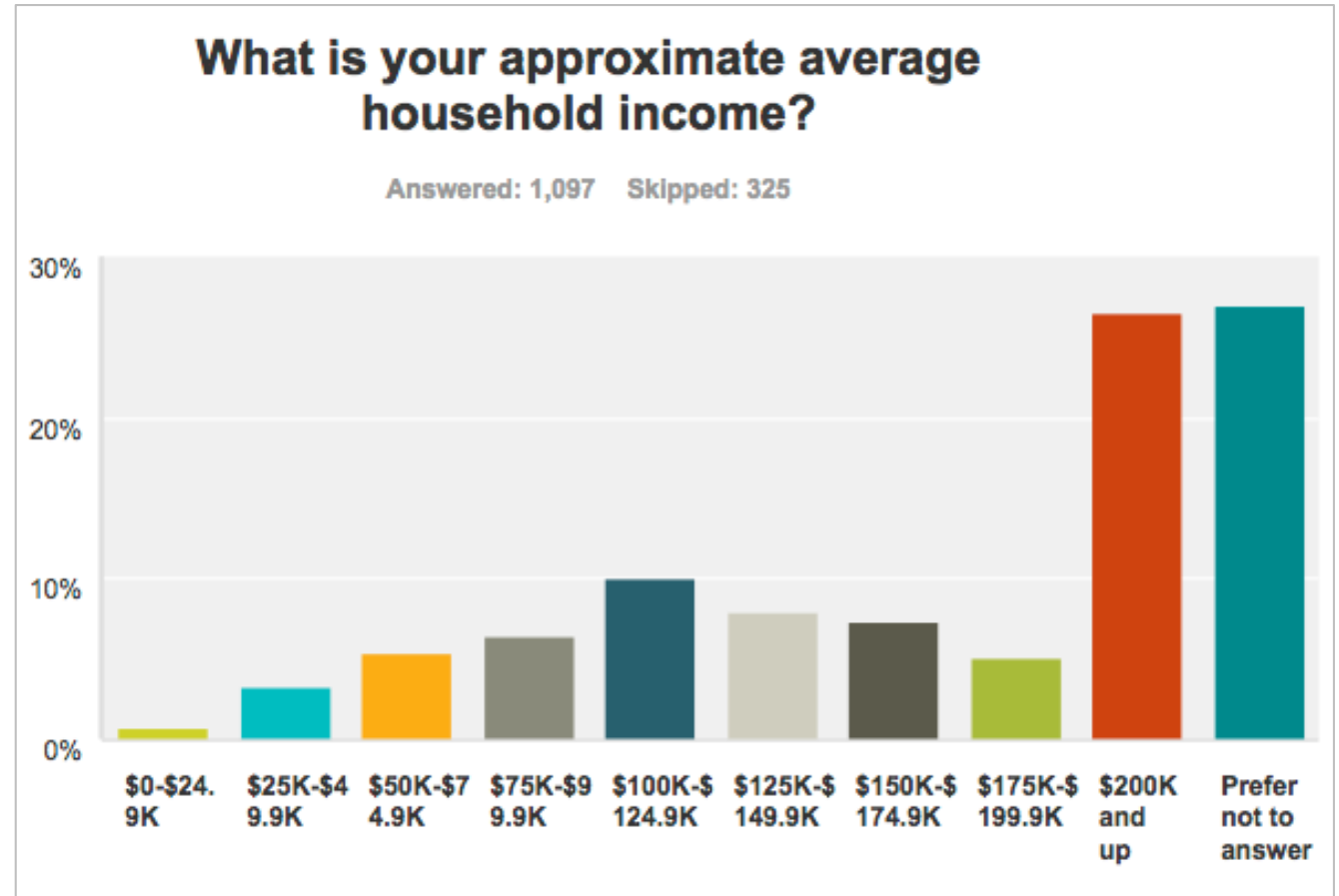
## Results: Respondent Characteristics

- \* Survey respondents are well-educated: 42.97 percent have a Bachelor degree and 41.07 percent have a Graduate or professional degree.



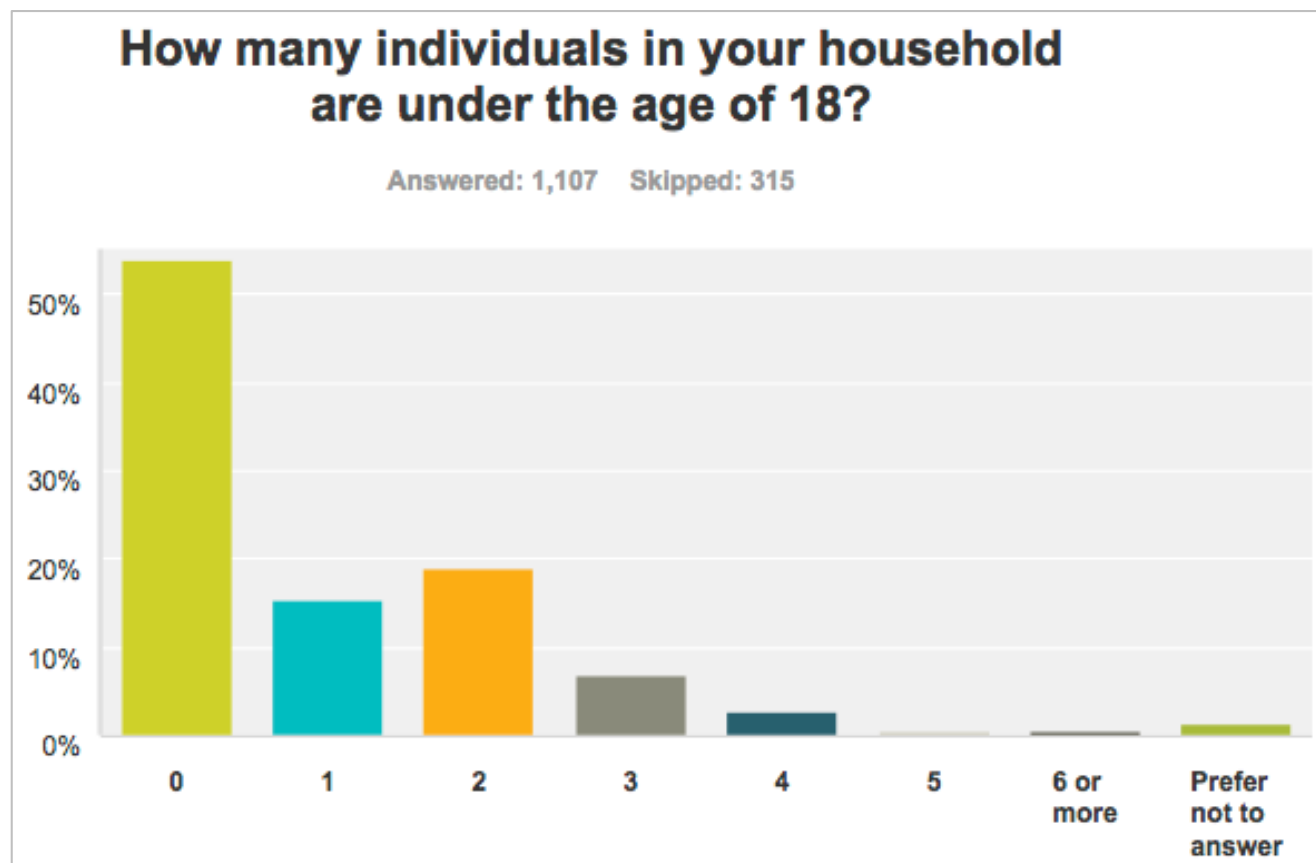
## Results: Respondent Characteristics

- \* They are also affluent: 26.62 percent have an average household income of \$200K and up.
- \* An additional 26.98 percent preferred not to answer the question.



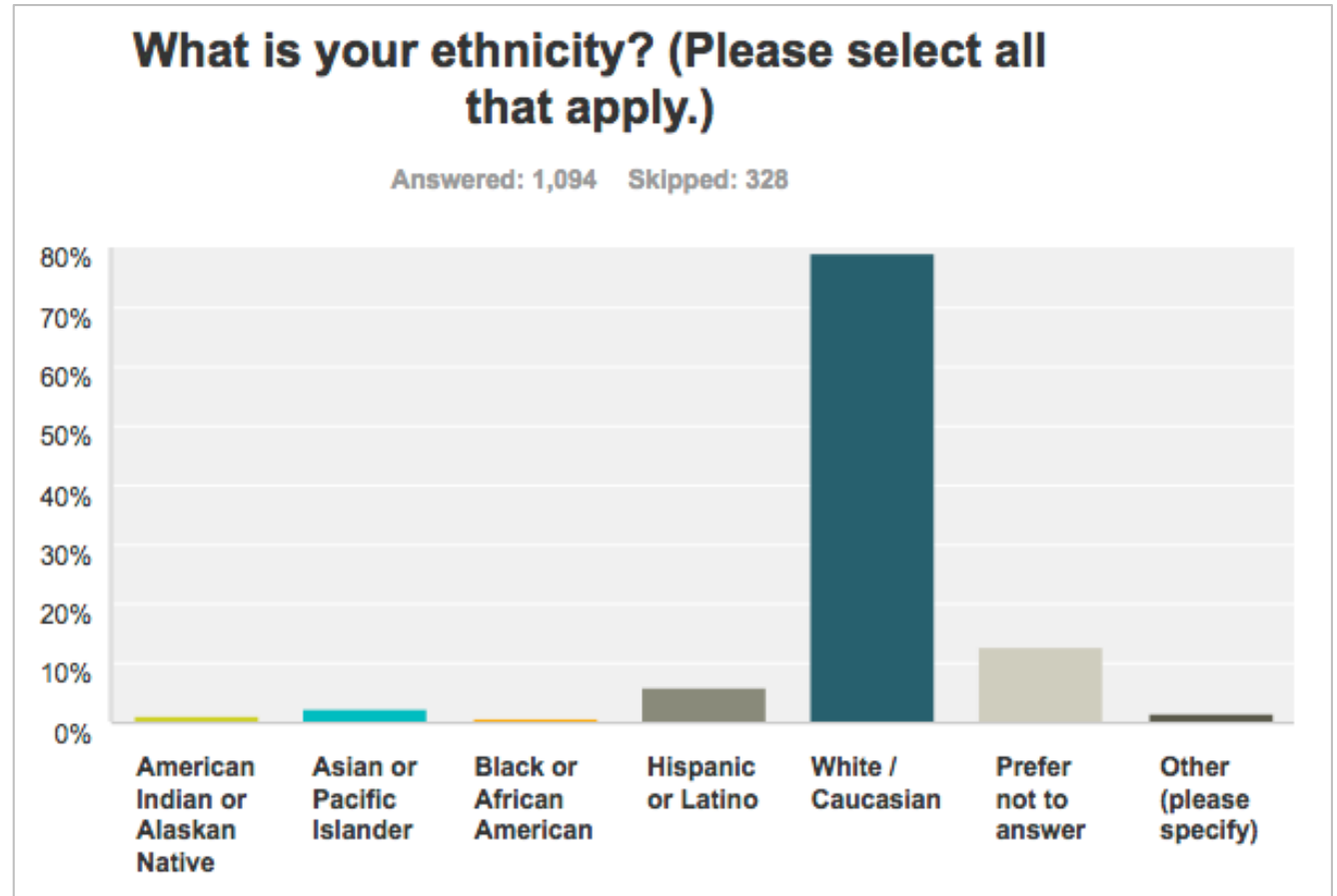
## Results: Respondent Characteristics

- \* Most households do not have anyone under the age of 18.



## Results: Respondent Characteristics

- \* Overwhelmingly, respondents were White/Caucasian (79.07 percent).



## Survey conclusions

- \* The survey indicates that residents of The Woodlands and surrounding communities actively attend the arts, although most are traveling outside of The Woodlands to do so.
- \* The primary barriers to participation in the arts in The Woodlands are marketing and content, indicating that there is work to do in terms of sharing information about events and that there are opportunities to diversify the programs that are offered.
- \* The majority of survey respondents support the development of new and/or additional arts and cultural programs and facilities, and most are likely or somewhat likely to contribute financially to their development, construction, and/or ongoing operation.
- \* More than half of survey respondents are supportive of facilities and programs that support the creative process and more than half are supportive of facilities and programs that focus on multi-media arts and technology.
- \* Respondents indicated that supporting quality of life and livability are the most important things when it comes to increasing arts and cultural activity in the community.
- \* The demographics of survey respondents are representative of the population of The Woodlands.





# User demand



# User demand

## Overview

Over the course of this needs assessment, we gathered information on demand for various types of space from local and regional arts and cultural groups and organizations.

## Methodology

To complete this phase of the assessment, we worked with the Township to identify a number of community groups, educators, and other organizations that might have demand for new or improved cultural space(s). Finally, having asked all parties to estimate the number of times they might use a cultural space throughout the year for performances, rehearsals, classes, workshops, exhibitions, meetings, and/or events, we created a series of charts that quantify demand.



# User demand

✧ The following potential users indicated demand for space:

- ✧ **Lone Star Community College-Montgomery:** Lone Star Community College-Montgomery has expressed interest in developing arts and cultural facilities. Demand for such space exists on the part of the College's Theatre Arts, Art, and Music departments as well as the College for convocations and graduations.
- ✧ **Inspire Film Festival:** Inspire Film Festival held its inaugural festival in February and, met with much success, has already been scheduled for next year. The event takes place at multiple venues across the city; however, working with commercial theaters can be challenging. The organization has interest in a large, divisible theater that can accommodate between 500 and 1,000.
- ✧ **The Woodlands Symphony Orchestra:** After a five-year hiatus, The Woodlands Symphony Orchestra is back and focused on highlighting the musicians of The Woodlands. The Symphony's ideal venue would have 1,200 seats, great acoustics, a multi-function lobby, and classroom and workshop space.
- ✧ **Boni's Dance + Performing Arts Studio:** Boni's Dance + Performing Arts Studio is in its 33<sup>rd</sup> year. The school has demand for a 1,000-seat theater with rehearsal space and choir and band rooms.
- ✧ **The Woodlands Christian Academy:** The Woodlands Christian Academy has 600 students in Pre-K through 12<sup>th</sup> grade. Currently, the school uses a multi-purpose room for band concerts, plays, and other arts activities. The school is interested in using a new facility for student productions, graduations, and fine art exhibitions.
- ✧ **River Oaks Chamber Orchestra:** River Oaks Orchestra is a 40-piece professional orchestra that plays throughout the Houston metro area. The group's ideal space would have around 1,000 seats with some flexibility, configurable acoustics, some tech, and recording capabilities.
- ✧ **ArtFeel/Storytelling:** ArtFeel is a multi-media project that will highlight public art in The Woodlands. As a component of that work, ArtFeel could imagine using a performance space for a storytelling series that's akin to *The Moth*.



# User demand

- ✧ **Sam Houston State University:** Sam Houston State University would like to get more involved in arts and culture and has demand for a facility in The Woodlands a few days each year.
- ✧ **Class Act:** Class Act is a youth-focused community theater that was started in 1996. Their ideal facility would have 500 to 600 seats and great technical capabilities.
- ✧ **The Woodlands Chorale:** The Woodlands Chorale is a 50-voice chorus with a loyal following. Leadership is interested in a 350-seat theater that could also be used for rehearsals.
- ✧ **The Woodlands Salon Series:** The Woodlands Salon Series presents small classical concerts in a 100-seat theater that is based in a home. While this format has been successful, the Series organizer does not want to present house concerts forever and is interested using in a small recital hall for events.
- ✧ **Conroe Independent School District** and **The Woodlands Methodist School** also expressed demand for new performance facilities but were unable to quantify capacity or demand. In addition, Glad Gallery is interested in having access to a facility where its represented artists could speak.
- ✧ Anecdotally, we heard that there are a number of **visual artists** and **writers** in need of studio space. Artists, in particular, are in need of a larger, more industrial art space where they can work with resin, use welding equipment, and so on.



# User demand

- \* The following charts work to quantify demand for new arts and cultural facilities in The Woodlands.
- \* This first chart shows 17 different potential users of new performance space, each with varying levels of demand and different capacity needs.
- \* The chart indicates that, in total, there are 1,059 days of demand for performance facilities in The Woodlands: 197 days for rehearsals and tech, 354 days for performances, and 508 days for 'other' events (classes, fundraisers, speaking events, etc.).
- \* Lone Star Community College has the most demand for space (625 days of use), followed by The Woodlands Symphony Orchestra (190 days of use).

User Demand: Performance Space	Rehearsal/ Tech	Performances	Other	Total	Low Capacity	High Capacity	Average Capacity
Lone Star Community College-Montgomery: Student Affairs	2	3	-	5	500	5,000	2,750
Inspire Film Festival	-	-	4	4	500	2,000	1,250
The Woodlands Symphony Orchestra	104	8	4	116	-	-	1,200
The Woodlands Area Youth Symphony	52	2	-	54	-	-	1,200
Boni's Dance + Performing Arts Studio✦	1	1	-	2	-	-	1,000
The Woodlands Christian Academy: Lower School Productions + Graduation	2	2	1	5	-	-	1,000
River Oaks Chamber Orchestra	-	5	-	5	-	1,000	1,000
ArtFeel/Storytelling*	-	4	-	4	-	-	800
Sam Houston State	5	10	-	15	400	800	600
Class Act	12	16	56	84	500	600	550
The Woodlands Christian Academy: Theater Productions	4	8	0	12	400	500	450
The Woodlands Township Parks + Recreation: Environmental Services	-	1	12	13	200	500	350
Lone Star Community College-Montgomery: Theatre Arts	-	60	255	315	-	-	350
The Woodlands Chorale	3	6	-	9	-	-	350
The Woodlands Symphony Orchestra: Chamber Series	4	16	-	20	-	-	350
Salon Series (Scott Cutler)	-	91	-	91	150	200	175
Lone Star Community College-Montgomery: Music Department	8	121	176	305	-	-	154
<i>Total Days of Use:</i>	197	354	508	1,059	-	-	-

\*estimated capacity ✦estimated use



# User demand

- \* Here, we provide a summary of the data on the previous chart, organizing demand according to similar capacity needs.
- \* This chart indicates that there is the most demand (765 days) for a performance facility with fewer than 500 seats. Seven groups indicated demand for such a space.
- \* There are 191 days of demand for a facility with 1,000 or more seats and 103 days of demand for a facility with 550 to 999 seats.

User Demand Summary: Performance Facilities (16 Users)*	Rehearsal/ Tech	Performances	Other	Total
1,000 or more seats (7 users)	161	21	9	191
550 to 999 seats (3 users)	17	30	56	103
500 or fewer seats (7 users)	19	303	443	765
Total Days of Use:	197	354	508	1,059



# User demand

- \* Finally, we quantified demand for small performance and rehearsal space, exhibition space, and classroom space. These numbers, particularly for small performance and rehearsal space, are likely conservative estimates.
- \* The charts indicate that there is considerable demand for exhibition space (830 days). Further, there are 4,614 hours of demand for classroom space.

User Demand: Small Performance + Rehearsal Space (Days)	Performance	Rehearsal	Other	Total	Capacity
The Woodlands Chorale	-	40	-	40	60
Lone Star Community College-Montgomery: Theatre Arts	6	-	120	126	50
<i>Total Days of Use:</i>	6	40	120	166	-

User Demand: Exhibition Space (Days)	Exhibitions	Capacity
The Woodlands Art League	385	30
Lone Star Community College-Montgomery: Art Department	385	50
The Woodlands Christian Academy*	60	50
<i>Total Days of Use:</i>	830	-

\*indicates estimation

User Demand: Classroom Space (Hours)	Classes/Workshops	Capacity
The Woodlands Art League	2,080	30
The Woodlands Symphony Orchestra*	2,080	50
Lone Star Community College-Montgomery: Theatre Arts*	432	50
Lone Star Community College-Montgomery: Art Department	16	50
The Woodlands Methodist School	6	
<i>Total Hours of Use:</i>	4,614	-



## Facility partners

- ✧ In addition to potential users, we also sought out organizations that could be partners in the development and operation of additional facilities. At this moment in time, the most likely partner in the development of new performance and visual arts facilities appears to be **Lone Star Community College**.
- ✧ Beyond performing and visual arts facilities, the opportunity to partner with the **Houston Museum of Nature and Science** on the creation of a satellite museum still exists. For this opportunity to advance, the Township (or another entity) would need to agree to build the building and the Museum would take over programming and operations.
- ✧ Similarly, **The Woodlands Children's Museum** could also be a potential partner on the creation of a new facility, particularly given that they already serve a large portion of the local and regional communities.





## User demand conclusions

- \* There is significant demand for arts and cultural space in The Woodlands.
- \* Research indicates that, in total, there are 1,059 days of demand for performance space, including 765 days of demand for a performance facility with 500 or fewer seats.
- \* In addition, there are 830 days of demand for exhibition space and 4,614 hours of demand for visual and performing arts classroom space.
- \* Our research indicates somewhat less demand for small performance and rehearsal space. These numbers, however, are likely conservative.
- \* Finally, there are a few entities with which to partner on the development of new facilities: Lone Star Community College, The Houston Museum of Nature and Science, and The Woodlands Children's Museum.



# Existing Facilities



# Facility inventories

## Overview

In order to assess the competitive situation for new arts and cultural facilities in The Woodlands, we developed four inventories:

- \* **The Woodlands Local + Regional Performance Facilities Inventory:** Inventories local (defined as The Woodlands Township) and regional (defined as located outside of The Woodlands but within a 20-mile radius of The Woodlands Township Building) facilities used on a regular basis (4 or more times per year) for live performances.
- \* **The Woodlands Local + Regional Museums + Galleries Inventory:** Inventories museums and gallery spaces within a 20-mile radius of The Woodlands Township Building.
- \* **The Woodlands Local + Regional Participatory Program Facilities Inventory:** Inventories facilities with hands-on and participatory arts and culture programs within a 20-mile radius of The Woodlands Township Building.
- \* **The Woodlands Local + Regional Meeting + Event Facilities Inventory:** Inventories meeting and event spaces with seated event capacities of 500 or more within a 20-mile radius of The Woodlands Township Building.

This exercise allows us to analyze the current stock of facilities in the region, including their amenities, features, programming, and availability, in order to identify gaps.



# Local + regional performance facility inventory

## Methodology

- \* The Woodlands Local + Regional Performance Facilities Inventory considers the physical features and types of activities hosted within 51 local and regional facilities.
- \* In addition, the condition and functionality of each facility has been rated using eight variables. They are:
  - \* Facility condition,
  - \* Staff and support,
  - \* Theatrical functionality,
  - \* Acoustics,
  - \* Customer amenities,
  - \* User amenities,
  - \* Atmosphere/character, and
  - \* Suitability for users.
- \* Variables are rated on a scale of 1 to 4, with the higher score being better. The 'facility condition' and 'staff and support' categories carry the most weight.
- \* The inventoried facilities range in capacity from 25 to 16,500 seats.
- \* Twenty-five of the inventoried facilities are local and 31 are regional.



# Local + regional performance facility inventory

The Woodlands Local + Regional Performance Facilities

Performance facilities within 20 miles of The Woodlands

Performance facilities within 20 miles of The Woodlands				Event Types Supported	Facility Rating								Presenting Activity										Producing Activity					Rental Activity							
Type	Facility	Capacity	Facility Condition		Staff and Support	Theatrical Functionality	Acoustics	Customer Amenities	User Amenities	Atmosphere/Character	Suitability for Users	Rating	Dance	Music	Headliner/Popular Music	Theatre	Broadway	Film	Family	Comedy	Speaker	Cultural	Theatre	Music	Dance	Educational/Academic	Cultural	Cultural Organizations	Touring Broadway	School/College	Private Events	Promoter			
Local Facilities	Other	Cynthia Woods Mitchell Pavilion	16,500	6	3	4	3	3	4	4	4	3	3.5																						
	Religious	The Woodlands Church	3,000	6	4	3	3	3	4	3	4	3	3.4																						
	Religious	The Woodlands United Methodist Church: Sanctuary	2,200	5	3	3	2	3	3	3	4	3	3.0																						
	Religious	The Woodlands United Methodist Church: Harvest Worship Center	1,000	5	4	3	3	3	3	3	4	3	3.3																						
	School/Uni.	The Woodlands High School: Auditorium	900	4	2	2	3	3	3	3	2	3	2.5																						
	Religious	The Woodlands United Methodist Church: Loft Worship Center	850	5	4	3	3	3	3	3	4	3	3.3																						
	School/Uni.	The Woodlands College Park High School: Auditorium	850	4	3	2	3	3	3	2	3	3	2.7																						
	School/Uni.	McCullough Jr. High: Nancy Bock Auditorium	808	4	3	2	3	3	3	2	2	3	2.6																						
	School/Uni.	John Cooper School Glenn Performing Arts Center	497	5	3	3	4	3	3	3	4	4	3.3																						
	Live Music	Dosey Doe: Big Barn*	350	3	3	3	2	4	3	2	3	3	2.9																						
	Religious	The Woodlands United Methodist Church: Robb Chapel	300	4	3	2	2	2	2	2	4	2	2.4																						
	Live Music	Cielo Latin Bar + Lounge*	150	3	2	2	1	2	3	2	2	1	1.9																						
	Other	MCMLS South Regional Library: Large Meeting Room	136	2	3	3	1	2	3	1	3	3	2.5																						
	School/Uni.	John Cooper School Glenn Performing Arts Center: Black Box	125	4	3	3	2	2	3	3	3	3	2.8																						
	School/Uni.	The Woodlands High School: Black Box	125	4	2	2	2	2	3	3	2	3	2.3																						
	Live Music	The Refuge Bar + Bistro	100	2	2	1	1	1	3	1	3	2	1.7																						
	School/Uni.	The Woodlands College Park High School: Black Box*	100	4	3	2	2	2	3	2	2	2	2.3																						
	Other	The Woodlands Children's Museum	80	8	3	2	1	1	3	2	3	2	2.2																						
	Live Music	Truluck's	80	2	2	1	1	1	3	1	3	1	1.6																						
	Live Music	1252 Tapas Bar	75	2	2	1	1	1	3	1	3	1	1.6																						
	Live Music	Amerigo's Grille	75	2	2	1	1	1	3	1	3	1	1.6																						
	Live Music	Tommy Bahama	70	2	2	1	1	1	3	1	2	1	1.5																						
	Live Music	Kirby's Steakhouse	65	2	2	1	1	1	3	1	3	1	1.6																						
	Live Music	The Goose's Acre*	30	2	2	1	1	1	3	1	3	1	1.6																						
	Live Music	Local Pour	25	2	2	1	1	1	3	1	3	1	1.6																						

8% 68% 24% 4% 0% 0% 8% 4% 4% 4% 28% 44% 8% 56% 8% 56% 0% 48% 92% 8%



# Local + regional performance facility

The Woodlands Local + Regional Performance Facilities  
Performance facilities within 20 miles of The Woodlands

Performance facilities within 20 miles of The Woodlands													Facility Rating										Presenting Activity										Producing Activity					Rental Activity				
Type	Facility	Capacity	Event Types Supported	Facility Condition	Staff and Support	Theatrical Functionality	Acoustics	Customer Amenities	User Amenities	Atmosphere/Character	Suitability for Users	Rating	Dance	Music	Headliner/Popular Music	Theatre	Broadway	Film	Family	Comedy	Speaker	Cultural	Theatre	Music	Dance	Educational/Academic	Cultural	Cultural Organizations	Touring Broadway	School/College	Private Events	Promoter										
Regional Facilities	School/Uni.	Westfield High School: Geiger Performing Arts Center Auditorium	1,200	5	3	2	3	4	3	3	3	4	3.0																													
	School/Uni.	Conroe High School Auditorium*	1,200	4	3	2	3	3	3	2	2	3	2.6																													
	Religious	Cypress Creek Community Center: The Centrum	877	6	3	2	2	3	2	2	3	3	2.5																													
	Performance	Crichton Theatre	541	6	2	3	3	2	3	3	3	3	2.7																													
	School/Uni.	Oak Ridge High School: Theatre*	500	4	3	2	3	3	3	3	2	3	2.7																													
	School/Uni.	Lone Star College-Tomball: Performing Arts Center	425	5	3	3	4	3	3	3	4	3	3.2																													
	Religious	Cypress Creek Christian Community Center: The Forum Auditorium	378	4	2	3	2	2	4	2	2	2	2.4																													
	School/Uni.	Lone Star College-Montgomery: Theater	350	4	3	3	3	3	3	3	3	3	3.0																													
	Performance	Owen Theatre	250	1	3	3	3	2	2	3	3	3	2.8																													
	School/Uni.	Lone Star College-Montgomery: Recital Hall	167	3	4	2	2	4	3	3	4	3	3.1																													
	Performance	Playhouse 1960	150	1	2	3	2	2	2	2	2	3	2.3																													
	Performance	StageWorks: Garza Mainstage	150	1	3	3	3	3	3	3	3	3	3.0																													
	Live Music	Big Texas Dance Hall + Saloon	150	1	2	1	1	1	3	1	2	2	1.6																													
	Live Music	Renae's Homestyle Restaurant + Bar*	125	2	3	1	1	1	3	1	2	2	1.8																													
	Live Music	Main Street Crossing	120	3	3	2	2	2	3	2	3	2	2.4																													
	School/Uni.	Lone Star College-Kingwood: Recital Hall	100	3	3	2	2	3	3	2	3	2	2.5																													
	School/Uni.	Oak Ridge High School: Black Box*	100	4	3	2	2	2	3	2	2	2	2.3																													
	Live Music	The Concert Pub North*	100	2	2	3	2	2	3	1	2	2	2.2																													
	Live Music	Masones Saloon*	100	1	2	1	1	1	3	1	2	1	1.5																													
	Live Music	Crescent Moon Live*	100	3	2	2	1	1	3	1	1	2	1.7																													
	Live Music	Red Brick Tavern	100	1	3	1	1	1	3	1	3	1	1.8																													
	Live Music	The Office Live Venue*	75	2	2	2	1	2	3	1	2	2	1.9																													
	Live Music	Acadia Bar + Grill*	75	1	2	2	1	2	3	1	2	2	1.9																													
	Live Music	Backwoods Saloon*	75	2	1	1	1	1	3	1	1	1	1.2																													
	Live Music	19th Hole Grill + Bar*	75	2	2	3	2	2	3	2	2	2	2.3																													
	Live Music	Prospect Park Restaurant Willowbrook*	50	2	2	1	1	1	3	1	2	1	1.5																													
	Live Music	Martini Blu*	50	1	2	1	1	1	3	1	2	2	1.6																													
	Live Music	GenuWine Tasting Room*	50	2	2	1	1	1	2	1	2	1	1.4																													
	Live Music	Jailhouse Saloon*	50	1	1	1	1	1	3	1	2	1	1.3																													
	School/Uni.	Lone Star College-Montgomery: Black Box	40	2	3	2	1	2	2	2	3	3	2.3																													
	Live Music	Green Oaks Tavern*	25	1	2	1	1	1	2	1	2	1	1.4																													
*Some facilities and/or features estimated.													3%	65%	13%	0%	0%	0%	0%	6%	6%	3%	0%	35%	29%	3%	35%	0%	35%	0%	29%	55%	0%									

\*Some facilities and/or features estimated.

# Local + regional performance facility inventory

The Woodlands Local + Regional Performance Facilities

Performance facilities within 20 miles of The Woodlands

Performance facilities within 20 miles of The Woodlands				Facility Rating										Facility Features										Amenities							Availability									
Type	Facility	Capacity	Event Types Supported	Facility Condition		Staff and Support		Theatrical Functionality		Acoustics		Customer Amenities		User Amenities		Atmosphere/Character		Suitability for Users		Rating	Flexible Seating	Sizeable Wingspace	Orchestra Pit	Fly Space	Large Lobby	Rehearsal/Program Space	Other Event Space	Gallery	Kitchen Facilities	Alcohol Allowed	Dedicated Parking	Food Service	Lighting Equipment	Sound Equipment	Film/Projection Equipment	Ticketing Services	Not Available	Low	Medium	High
Local Facilities	Other	Cynthia Woods Mitchell Pavilion	16,500	6	3	4	3	3	4	4	4	3	3.5																											
	Religious	The Woodlands Church	3,000	6	4	3	3	3	4	3	4	3	3.4																											
	Religious	The Woodlands United Methodist Church: Sanctuary	2,200	5	3	3	2	3	3	3	4	3	3.0																											
	Religious	The Woodlands United Methodist Church: Harvest Worship Center	1,000	5	4	3	3	3	3	3	4	3	3.3																											
	School/Uni.	The Woodlands High School: Auditorium	900	4	2	2	3	3	3	3	2	3	2.5																											
	Religious	The Woodlands United Methodist Church: Loft Worship Center	850	5	4	3	3	3	3	3	4	3	3.3																											
	School/Uni.	The Woodlands College Park High School: Auditorium	850	4	3	2	3	3	3	2	3	3	2.7																											
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	School/Uni.	John Cooper School Glenn Performing Arts Center	497	5	3	3	4	3	3	3	4	4	3.3																											
	Live Music	Dosey Doe: Big Barn*	350	3	3	3	2	4	3	2	3	3	2.9																											
	Religious	The Woodlands United Methodist Church: Robb Chapel	300	4	3	2	2	2	2	2	4	2	2.4																											
	Live Music	Cielo Latin Bar + Lounge*	150	3	2	2	1	2	3	2	2	1	1.9																											
	Other	MCMLS South Regional Library: Large Meeting Room	136	2	3	3	1	2	3	1	3	3	2.5																											
	School/Uni.	John Cooper School Glenn Performing Arts Center: Black Box	125	4	3	3	2	2	3	3	3	3	2.8																											
	School/Uni.	The Woodlands High School: Black Box	125	4	2	2	2	2	3	3	2	3	2.3																											
	Live Music	The Refuge Bar + Bistro	100	2	2	1	1	1	3	1	3	2	1.7																											
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	Live Music	1252 Tapas Bar	75	2	2	1	1	1	3	1	3	1	1.6																											
	Live Music	Amerigo's Grille	75	2	2	1	1	1	3	1	3	1	1.6																											
	Live Music	Tommy Bahama	70	2	2	1	1	1	3	1	2	1	1.5																											
	Live Music	Kirby's Steakhouse	65	2	2	1	1	1	3	1	3	1	1.6																											
	Live Music	The Goose's Acre*	30	2	2	1	1	1	3	1	3	1	1.6																											
	Live Music	Local Pour	25	2	2	1	1	1	3	1	3	1	1.6																											

56% 12% 4% 12% 36% 72% 68% 4% ### 44% 100% 56% 56% 84% 60% 20% 0% 64% 36% 0%



# Local + regional performance facility inventory

The Woodlands Local + Regional Performance Facilities  
Performance facilities within 20 miles of The Woodlands

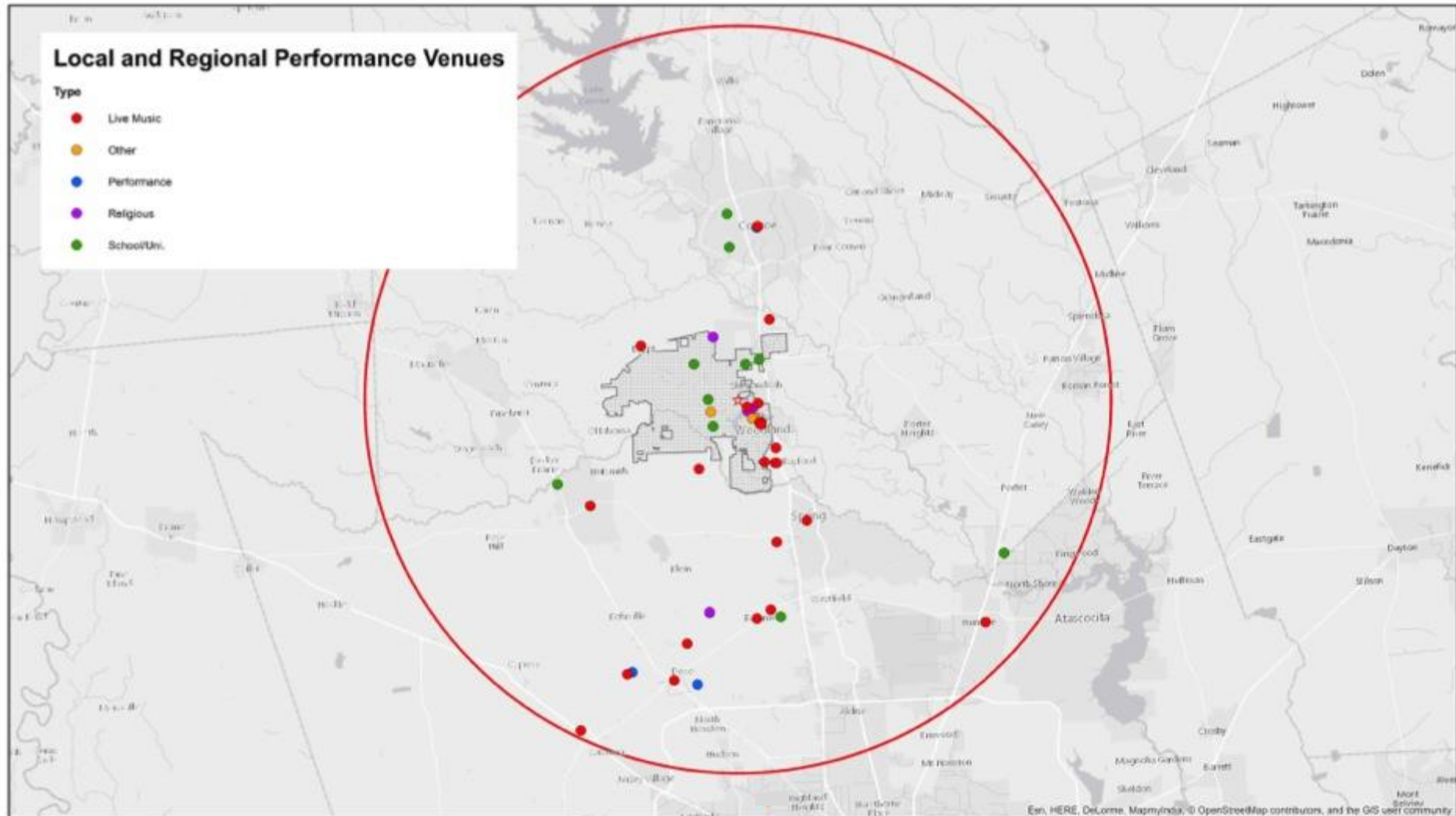
Performance facilities within 20 miles of The Woodlands			Facility Rating										Facility Features										Amenities							Availability										
Type	Facility	Capacity	Event Types Supported	Facility Condition		Staff and Support		Theatrical Functionality		Acoustics		Customer Amenities		User Amenities		Atmosphere/Character		Suitability for Users		Rating	Flexible Seating	Sizeable Wingspace	Orchestra Pit	Fly Space	Large Lobby	Rehearsal/Program Space	Other Event Space	Gallery	Kitchen Facilities	Alcohol Allowed	Dedicated Parking	Food Service	Lighting Equipment	Sound Equipment	Film/Projection Equipment	Ticketing Services	Not Available	Low	Medium	High
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	Religious	Cypress Creek Community Center: The Centrum	877	6	3	2	2	3	2	2	3	3	2.5																											
	Performance	Crichton Theatre	541	6	2	3	3	2	3	3	3	3	2.7																											
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	School/Uni.	Lone Star College-Tomball: Performing Arts Center	425	5	3	3	4	3	3	3	4	3	3.2																											
	Religious	Cypress Creek Christian Community Center: The Forum Auditorium	378	4	2	3	2	2	4	2	2	2	2.4																											
	School/Uni.	Lone Star College-Montgomery: Theater	350	4	3	3	3	3	3	3	3	3	3.0																											
	Performance	Owen Theatre	250	1	3	3	3	2	2	3	3	3	2.8																											
	School/Uni.	Lone Star College-Montgomery: Recital Hall	167	3	4	2	2	4	3	3	4	3	3.1																											
	Performance	Playhouse 1960	150	1	2	3	2	2	2	2	2	3	2.3																											
	Performance	StageWorks: Garza Mainstage	150	1	3	3	3	3	3	3	3	3	3.0																											
	Live Music	Big Texas Dance Hall + Saloon	150	1	2	1	1	1	3	1	2	2	1.6																											
	Live Music	Renae's Homestyle Restaurant + Bar*	125	2	3	1	1	1	3	1	2	2	1.8																											
	Live Music	Main Street Crossing	120	3	3	2	2	2	3	2	3	2	2.4																											
	School/Uni.	Lone Star College-Kingwood: Recital Hall	100	3	3	2	2	3	3	2	3	2	2.5																											
	School/Uni.	Oak Ridge High School: Black Box*	100	4	3	2	2	2	3	2	2	2	2.3																											
	Live Music	The Concert Pub North*	100	2	2	3	2	2	3	1	2	2	2.2																											
	Live Music	Masones Saloon*	100	1	2	1	1	1	3	1	2	1	1.5																											
	Live Music	Crescent Moon Live*	100	3	2	2	1	1	3	1	1	2	1.7																											
	Live Music	Red Brick Tavern	100	1	3	1	1	1	3	1	3	1	1.8																											
	Live Music	The Office Live Venue*	75	2	2	2	1	2	3	1	2	2	1.9																											
	Live Music	Acadia Bar + Grill*	75	1	2	2	1	2	3	1	2	2	1.9																											
	Live Music	Backwoods Saloon*	75	2	1	1	1	1	3	1	1	1	1.2																											
	Live Music	19th Hole Grill + Bar*	75	2	2	3	2	2	3	2	2	2	2.3																											
	Live Music	Prospect Park Restaurant Willowbrook*	50	2	2	1	1	1	3	1	2	1	1.5																											
	Live Music	Martini Blu*	50	1	2	1	1	1	3	1	2	2	1.6																											

\*Some facilities and/or features estimated.

58% 13% 10% 10% 13% 39% 32% 10% 61% 52% 94% 58% 81% 84% 32% 42% 39% 42% 19% 0%



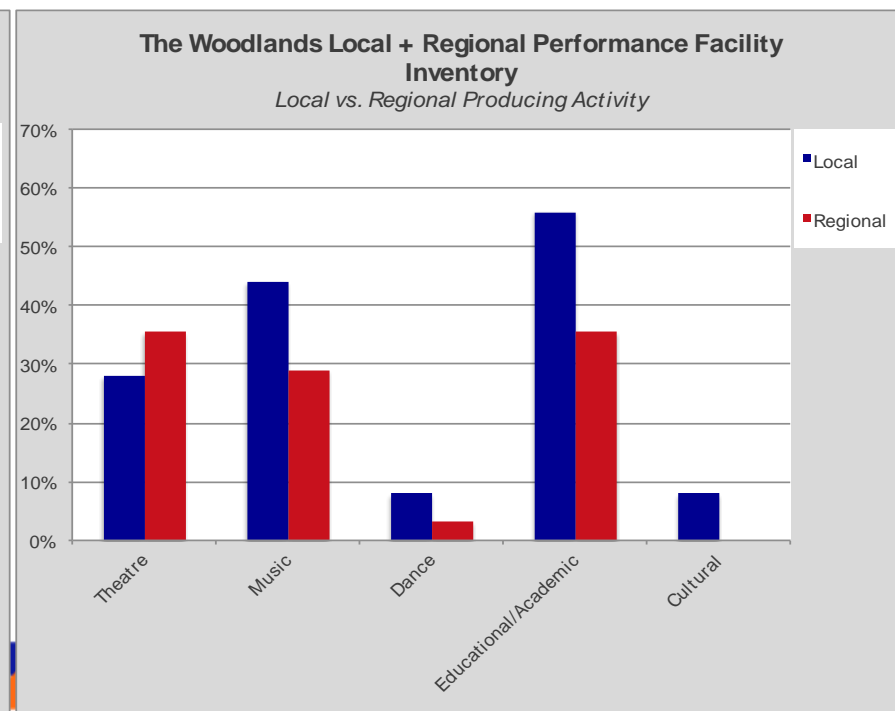
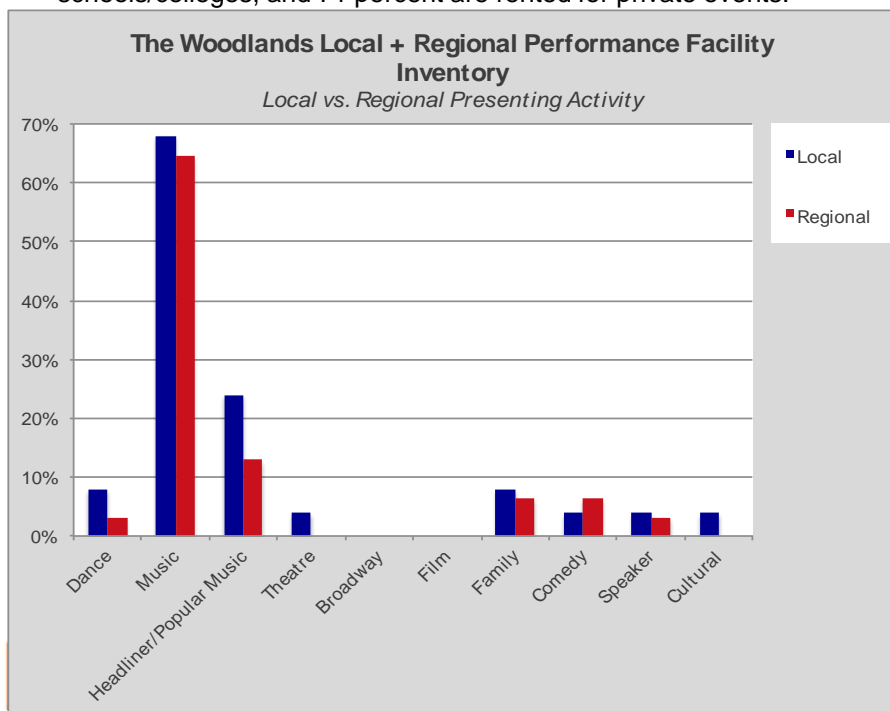
# Local + regional performance facility inventory



# Local + regional performance facility inventory

## Presenting + Producing Activity

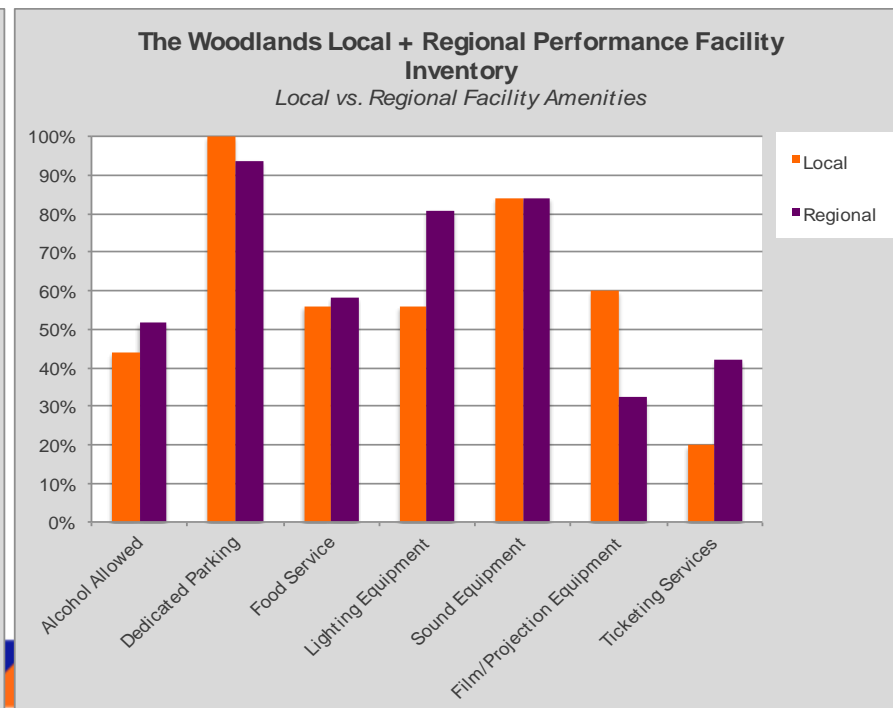
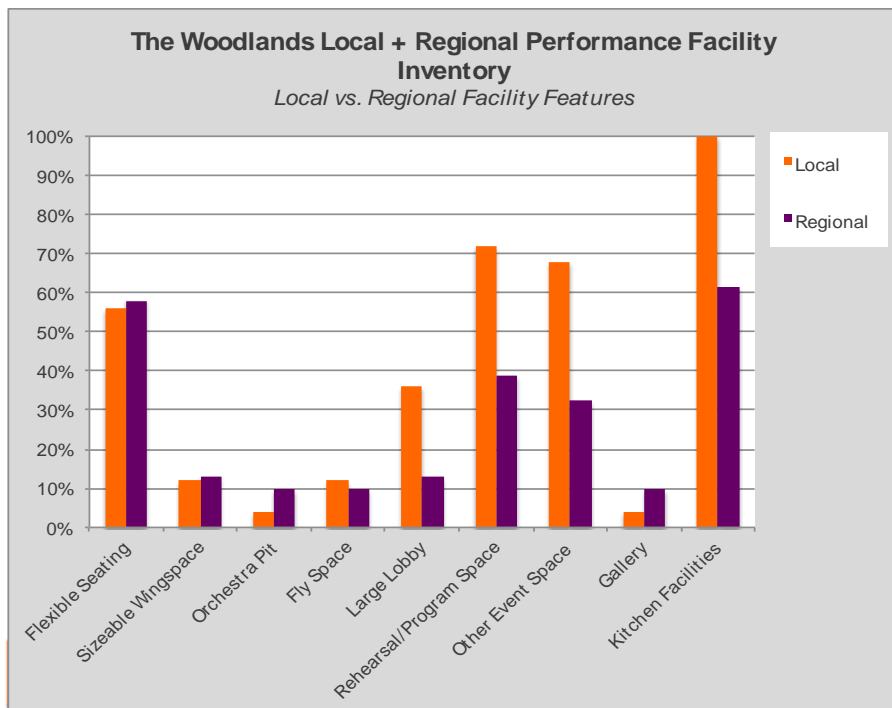
- \* Locally and regionally, presenting activity is focused on music: 68 percent of local facilities present music and 24 percent present headliner or popular music. Regionally, 65 percent of facilities present music and 13 percent present headliner or popular music.
- \* The Woodlands Children's Museum is the only facility that presents theatre or cultural programming. None of the inventoried facilities present Broadway, or film and only between four and 7 percent present dance, family programs, comedy, and/or speakers.
- \* Producing activity takes place in more facilities than presenting activity. In The Woodlands, 56 percent of local facilities produce educational/academic programs, 44 percent produce music, and 28 percent produce theatre.
- \* The fewest number of facilities are used to produce dance and/or cultural programming.
- \* Local and regional facilities are also used for rentals: 45 percent of local facilities are rented by cultural organizations, 38 percent are rented by schools/colleges, and 71 percent are rented for private events.



# Local + regional performance facility inventory

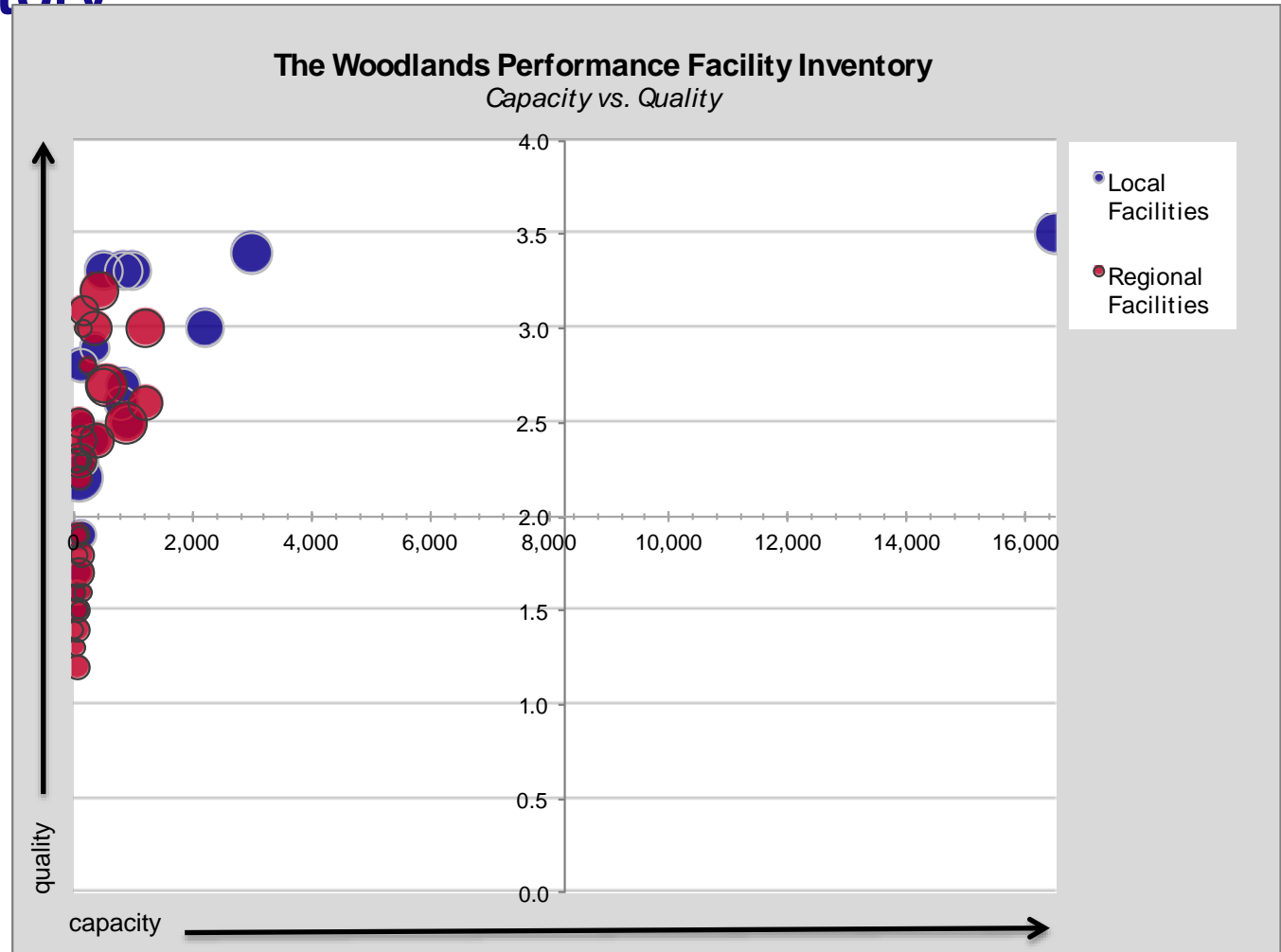
## Features + Amenities

- \* Locally, more than half of the facilities inventoried have features like flexible seating, rehearsal/program space, other event space, and/or kitchen facilities. Far fewer, however, have sizeable wing space, an orchestra pit, fly space, or gallery space. This also tends to be true of regional facilities.
- \* Nearly all of the inventoried facilities have dedicated parking and slightly more than half have food service.
- \* Locally, 56 percent of facilities have lighting equipment (compared to 81 percent regionally), 84 percent have sound equipment, and 60 percent have film/projection equipment.
- \* Regionally, a higher percentage of facilities have ticketing services (42 percent compared to 20 percent locally) and a higher percentage allows alcohol.



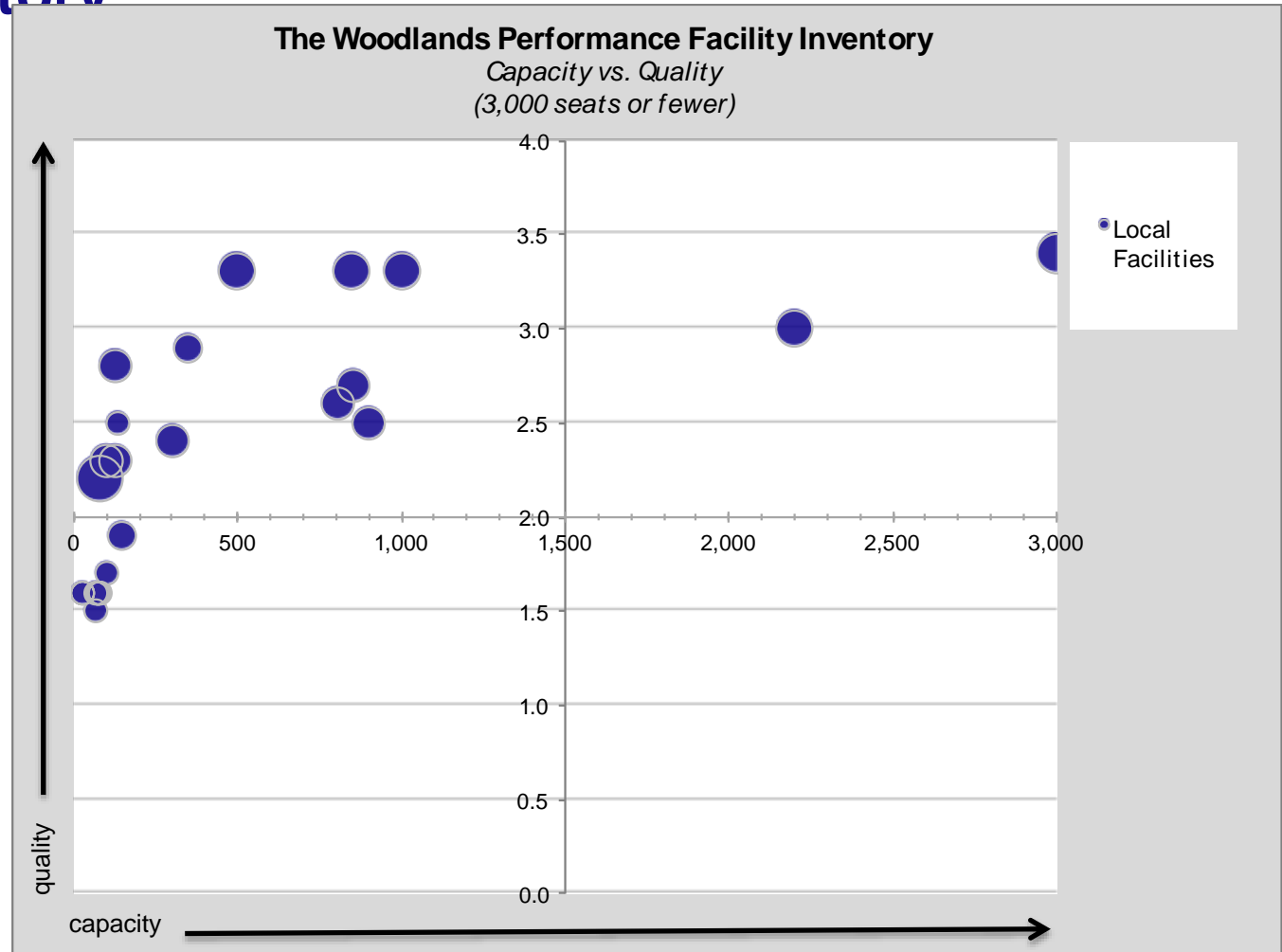
# Local + regional performance facility inventory

- \* Using data from the inventory, we have created a matrix that plots each facility according to its quality rating (y-axis) and capacity (x-axis).
- \* The size of the circle correlates to the number of types of activities each facility supports.
- \* Here, we look at the complete inventory, which indicates that Cynthia Woods Mitchel Pavilion is the largest facility within 20 miles of the Township Building.
- \* It also indicates that none of the inventoried facilities have a quality rating above 3.5.



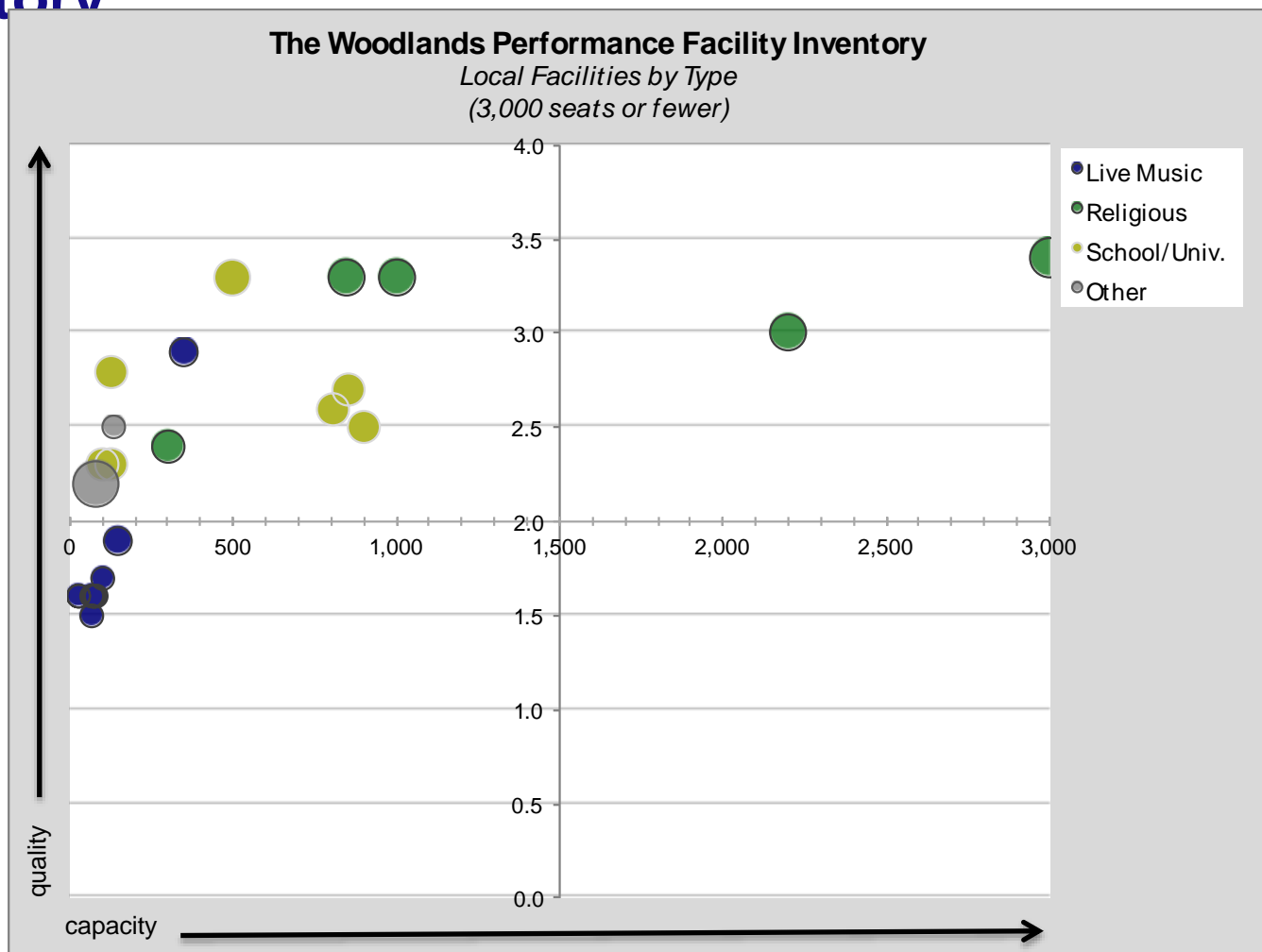
# Local + regional performance facility inventory

- \* This matrix zooms in on the previous matrix to highlight local facilities with a capacity of 3,000 seats or fewer.
- \* It indicates that there are few local facilities with a capacity greater than 500.
- \* Only four facilities have a quality rating above 3.0. They are the John Cooper School's Glenn Performing Arts Center Auditorium, The Woodlands United Methodist Church's Loft Worship Center and Harvest Worship Center, and The Woodlands Church.
- \* From the size of the circles, we can tell that most facilities do not support more than two or three activity types.



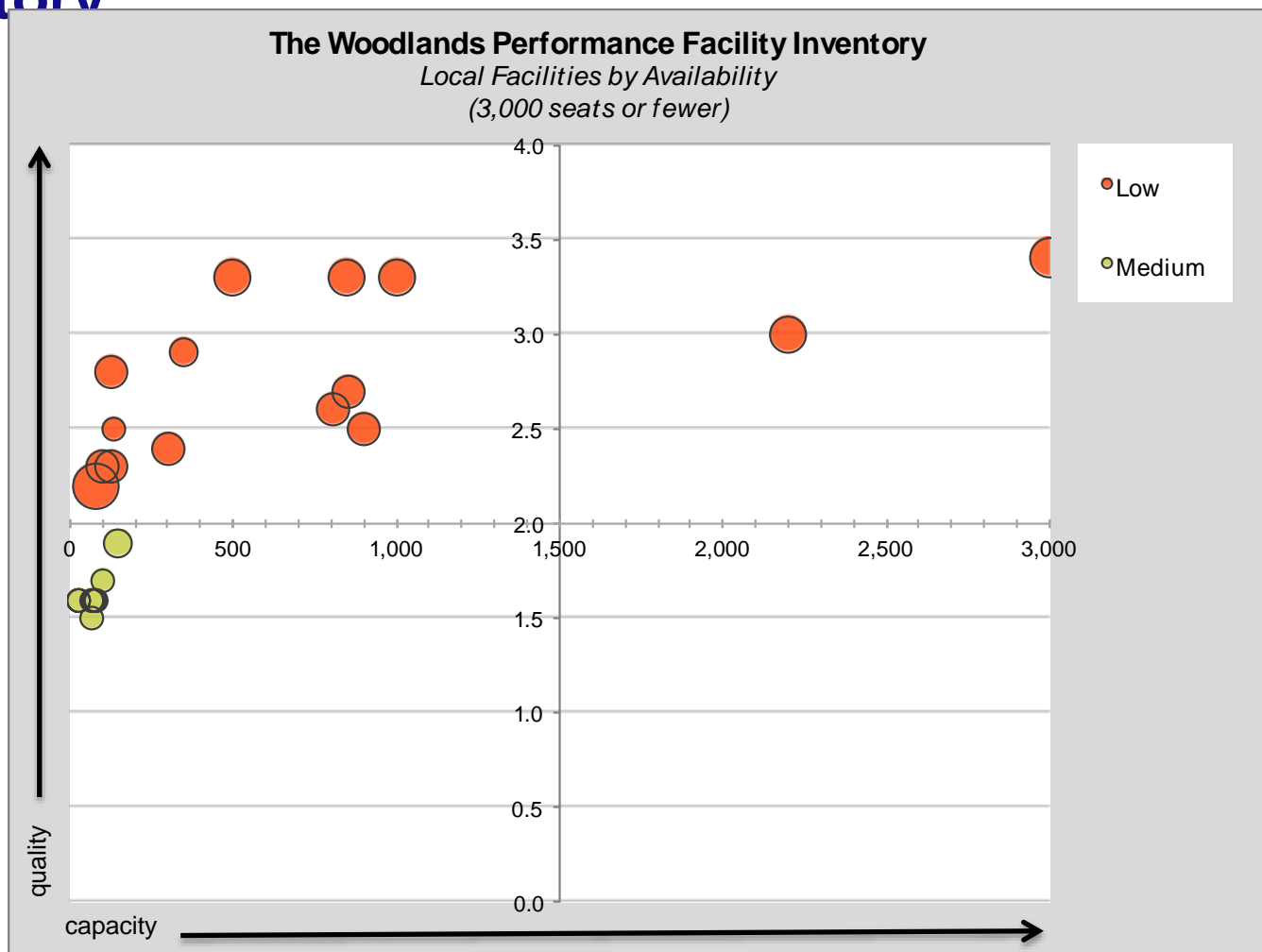
# Local + regional performance facility inventory

- \* In this matrix, the local facilities are colored according to what type of facility they are.
- \* The 'other' facilities in this matrix are the MCMLS South Regional Library's Large Meeting Room and The Woodlands Children's Museum.
- \* Of the 25 facilities inventoried, seven are affiliated with a school or university and five are affiliated with a church. This is important to highlight because these types of facilities often have busy internal calendars, or restrictive policies, that limit their availability for outside users.
- \* Strikingly, with the exception of Cynthia Woods Mitchell Pavilion, none of the local facilities are true, standalone performance spaces.



# Local + regional performance facility inventory

- \* Here, local facilities have been plotted according to their availability.
- \* Availability is determined through conversations with facility managers and online research and is based on how easily an outside user can book the space on a prime night of the week (Thursday, Friday, or Saturday).
- \* Nine of the inventoried local facilities have medium availability and 16 have low availability.
- \* The spaces with low availability are primarily school/university facilities and faith-based spaces. The medium availability facilities are all live music venues.
- \* This, combined with the information from the previous few slides, indicates that there is a gap for a high-quality, purpose-built performance venue in the local market.



# Local + regional museums + galleries inventory

## Methodology

- \* The Woodlands Local + Regional Museums + Galleries Inventory looks at the programming and features of 27 museums and galleries.
- \* Like with the performance facilities inventory, the condition and functionality of each facility has been rated using eight variables. They are:
  - \* Building condition,
  - \* Staff and support,
  - \* Program space,
  - \* Technology,
  - \* Customer amenities,
  - \* User amenities,
  - \* Atmosphere/character, and
  - \* Suitability for users.
- \* Variables are rated on a scale of 1 to 4, with the higher score being better. The 'building condition' and 'staff and support' categories carry the most weight.
- \* Nine of the inventoried facilities are museums and 18 are galleries.
- \* Six of the facilities (one museum and five galleries) are located in The Woodlands.





# Local + regional museums + galleries

## inventory

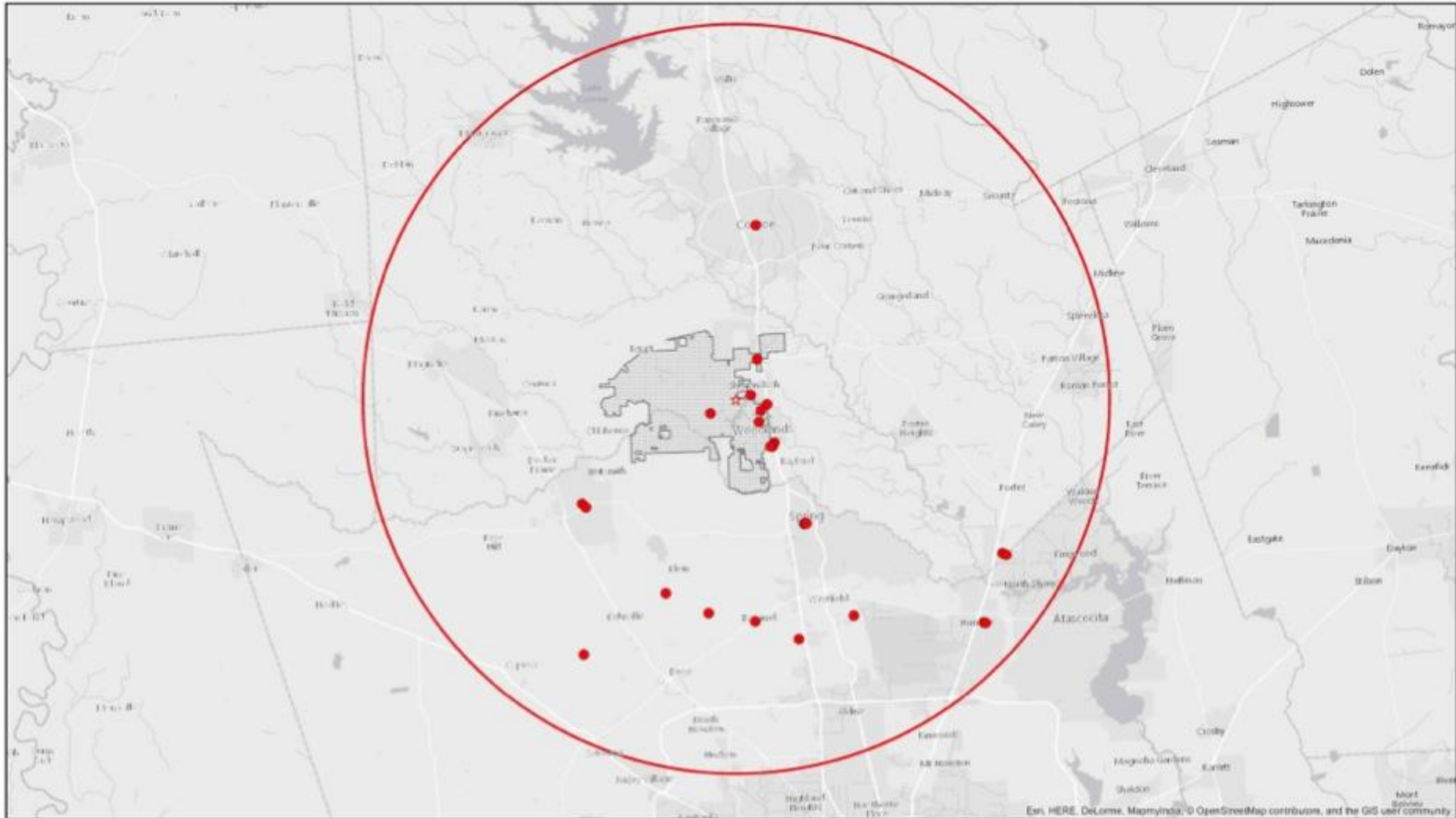
The Woodlands Local + Regional Museums + Galleries  
Museums and gallery spaces within 20 miles of The Woodlands

	Type	Facility
Local	Museum	The Woodlands Children's Museum
	Gallery	Glade Gallery
	Gallery	Glass Mermaid Studio+Gallery*
	Gallery	The Woodlands Mall: Spotlight Gallery
	Gallery	South County Community Center: Gallery
	Gallery	Woodlands Art League: Studio in the Woods
Regional	Museum	Heritage Museum of Montgomery County
	Gallery	Conroe Art League Gallery
	Gallery	Lone Star College-Montgomery: Matteson-Parish Art Gallery
	Gallery	Purple Elephant Gallery*
	Museum	Houston Pre-War+Classic Auto Museum
	Museum	National Museum of Funeral History
	Gallery	Lone Star College-North Harris: Art Gallery
	Gallery	Lone Star College-North Harris: Library Gallery
	Museum	Humble Museum
	Gallery	Red Palette Art Center
	Gallery	Lone Star College-Kingwood: Art Gallery
	Gallery	Martin Galleries
	Gallery	Art Outlet The Woodlands
	Museum	Pearl Fincher Museum of the Arts
	Museum	Spring Historical Museum
	Museum	Wunderlich Farm+Historic Klein
	Gallery	PTL Gallery
	Gallery	Mossrock Studio+Fine Art Gallery
	Gallery	Donny Hickmott Walking Horse Studio+Gallery
	Museum	Tomball Museum Center
	Gallery	Da Vinci's Espresso+Gallery

\*Some characteristics estimated.

Program Types Supported	Rating								Discipline	Programs							Facility Features							
	Building Condition	Staff and Support	Program Space	Technology	Customer Amenities	Atmosphere/Character	Suitability for Users	Rating		Visual Arts	Science/Living Collections	History/Culture	Participatory: Visual Arts+Crafts	Participatory: Performing Arts	Participatory: Academic	Participatory: Other	Arts/Cultural Performances	Free Public Events/Festivals	Auditorium/Lecture Hall	Classroom/Studio	Reception Space	Library/Research Archives	Retail Space	Café/Restaurant
6	3	3	2	3	3	3	3	2.8																
0	3	2	3	2	2	3	3	2.6																
1	2	2	1	1	1	2	1	1.5																
0	3	2	2	1	3	2	3	2.3																
0	2	2	3	2	3	2	3	2.4																
1	2	2	2	1	1	2	3	1.9																
									100%	17%	17%	50%	17%	17%	17%	17%	17%	0%	50%	17%	0%	0%	0%	0%
1	2	2	2	2	3	3	3	2.3																
3	3	3	3	1	2	3	3	2.7																
2	3	4	3	2	2	3	3	3.0																
2	2	2	2	1	2	3	3	2.1																
0	3	3	2	2	2	3	3	2.6																
0	3	3	2	3	3	3	3	2.8																
1	3	2	2	2	2	2	3	2.3																
1	3	2	3	2	2	2	3	2.5																
0	2	2	2	1	2	3	2	2.0																
2	2	2	2	1	2	2	3	2.0																
2	3	2	3	2	2	3	3	2.6																
1	2	1	2	1	1	2	3	1.7																
0	3	3	1	2	2	2	1	2.1																
3	3	4	3	2	3	3	3	3.1																
0	2	2	1	1	1	2	2	1.6																
1	2	2	2	2	3	3	3	2.3																
0	2	2	1	1	2	2	1	1.6																
1	3	2	1	1	1	2	2	1.8																
0	2	1	1	1	1	2	2	1.4																
1	2	2	3	1	2	3	2	2.2																
0	3	2	2	1	3	3	3	2.4																
									67%	0%	33%	33%	0%	24%	0%	14%	29%	0%	48%	19%	10%	33%	5%	5%

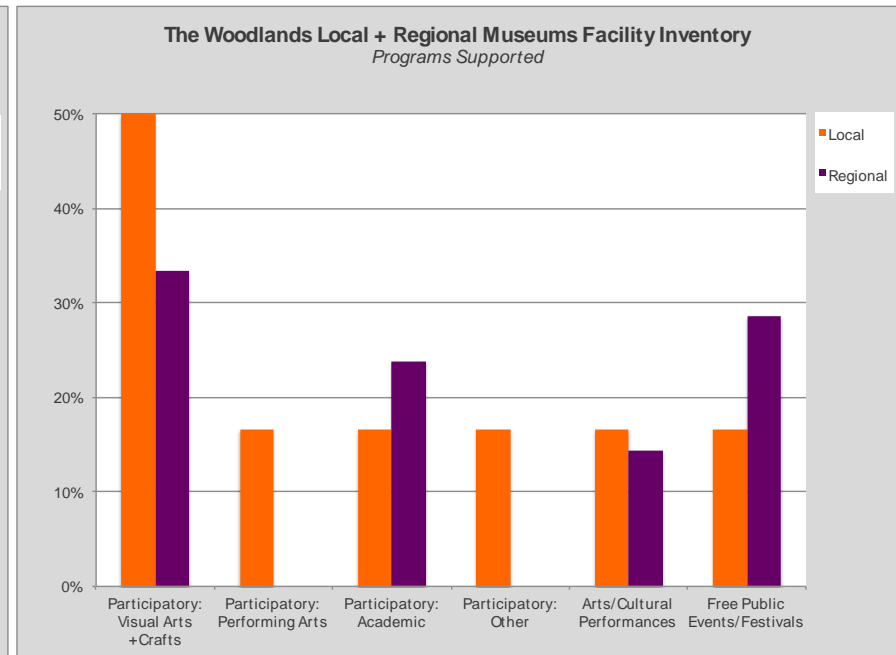
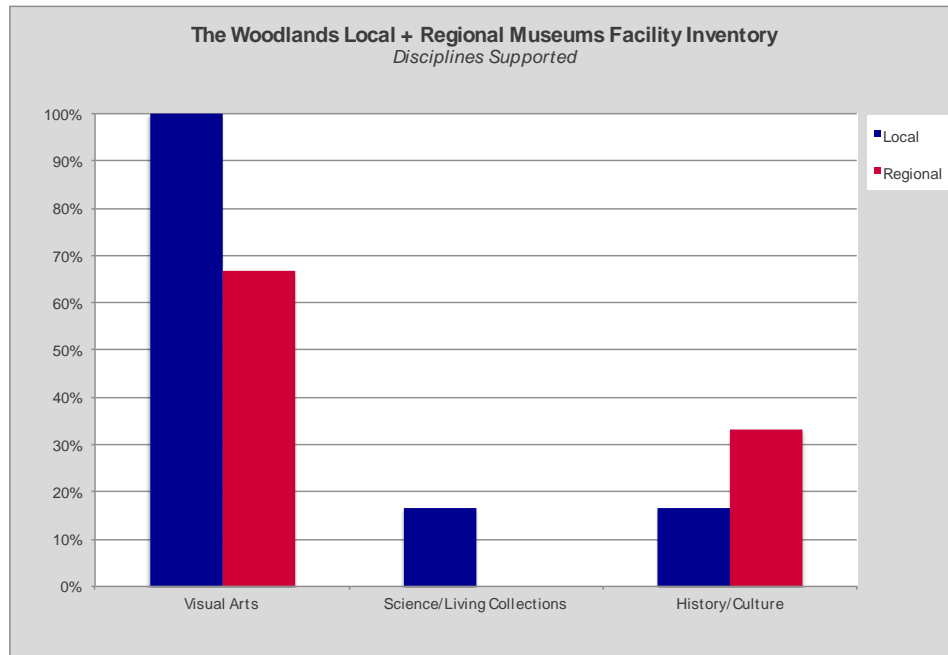
# Local + regional museums + galleries inventory



# Local + regional museums + galleries inventory

## Discipline + Programming

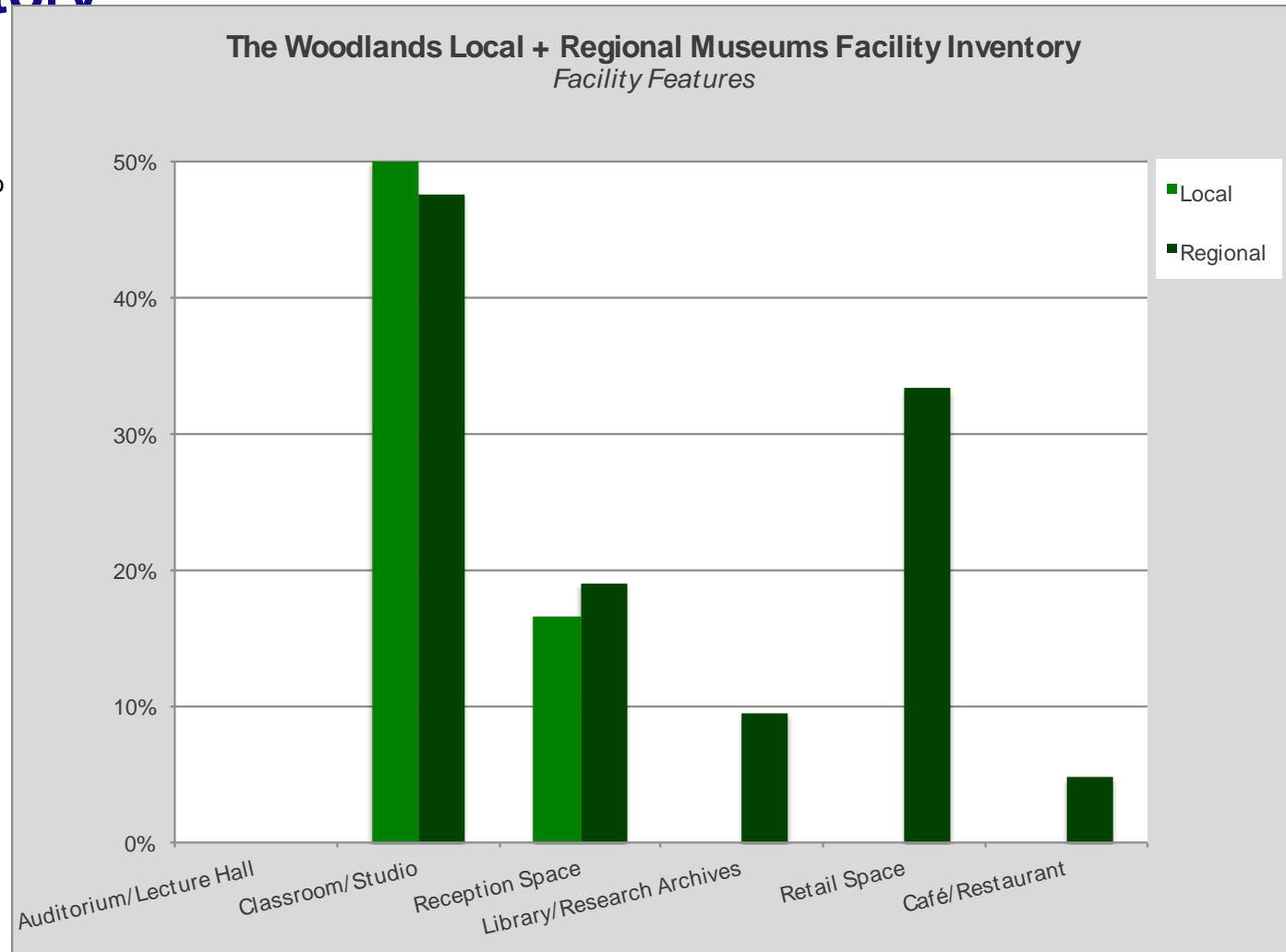
- \* In The Woodlands, only one facility, The Woodlands Children's Museum, has science/living collections or history/culture as a discipline. The remaining facilities have a visual arts focus.
- \* Regionally, thirty-three percent of the inventoried facilities are classified as having history/culture as a discipline and 67 percent are classified as having the visual arts as a discipline. None have science/living collections as a focus.
- \* Very few of the museum or gallery spaces in The Woodlands offer participatory programs.
- \* Regionally, 33 percent of participatory visual arts and crafts programs and 29 percent offer free public events or festivals.



# Local + regional museums + galleries inventory

## Facility Features

- \* Half of the facilities in The Woodlands have classroom or studio space. Only one has reception space.
- \* Regionally, forty-eight percent of the facilities inventoried have classroom or studio space and thirty-three percent have retail space.
- \* None of the facilities have an auditorium or lecture hall and only one has a café/restaurant.
- \* Two facilities (8 percent) have a library/research archives.



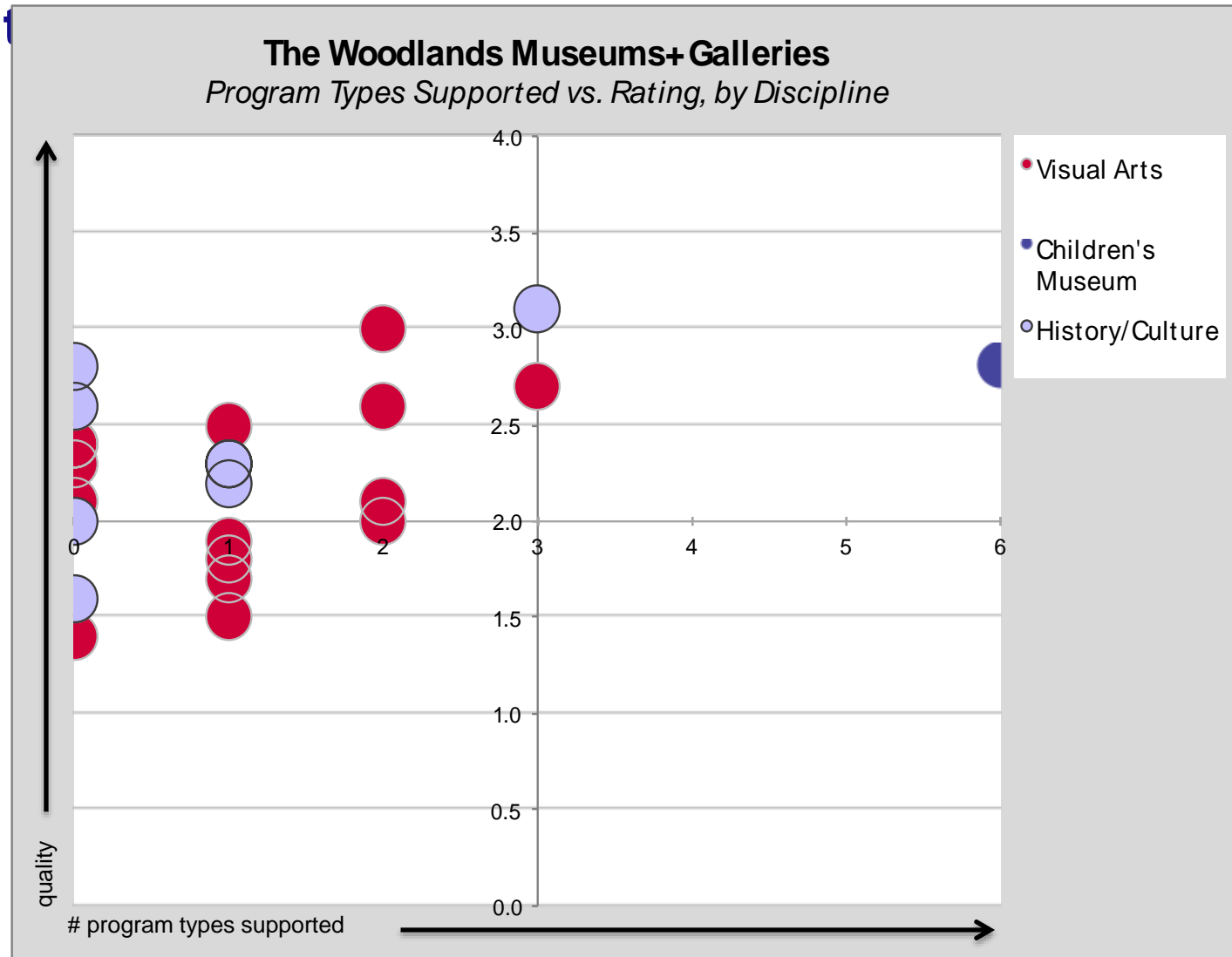
# Local + regional museums + galleries inven

- \* This matrix plots local and regional museums and galleries according to their quality rating and the number of program types they support.
- \* It indicates that regional facilities are both higher in quality than most local facilities and that they support a greater number of events.



# Local + regional museums + galleries inventory

- \* In this matrix, the inventoried facilities are organized according to discipline.
- \* Because the Children's Museum covers a variety of disciplines (visual arts, history/culture, science/living collections) it has been given its own circle.
- \* Facilities with history/culture disciplines support the fewer program types than visual arts facilities.
- \* Visual arts facilities also tend to have greater variance in quality.
- \* Overall, this inventory and matrix indicate opportunities for high quality museum and/or gallery space, particularly within the area of science or history, that is activated by a greater array of programs.



# Local + regional participatory programs inventory

## Methodology

- \* The Woodlands Local + Regional Participatory Program Facilities Inventory looks at the hands-on and participatory programs offered in 90 facilities.
- \* Once again, the condition and functionality of each facility has been rated using eight variables. They are:
  - \* Building condition,
  - \* Staff and support,
  - \* Program space,
  - \* Technology,
  - \* Customer amenities,
  - \* Accessibility,
  - \* Atmosphere/character, and
  - \* Suitability for users.
- \* Variables are rated on a scale of 1 to 4, with the higher score being better. The 'building condition' and 'staff and support' categories carry the most weight.
- \* Thirty-one of the inventoried facilities are located in The Woodlands.
- \* The majority (62) of the facilities are commercial spaces, 18 are municipal spaces, and 10 are nonprofit spaces.



# Local + regional participatory programs

## The Woodlands Local + Regional Participatory Program Facilities

Program facilities within 20 miles of The Woodlands

	Type	Facility	Disciplines Supported	Program Disciplines						Target Age Group			Frequency of Offerings			Facility Rating									
				Dance	Music	Theatre/Acting	Visual Arts	Tech/Digital Media	Food/Cooking	Other	Family/Youth	Adult	Senior	Low	Medium	High	Building Condition	Staff and Support	Program Space	Technology	Customer Amenities	Accessibility	Atmosphere/Character	Suitability for Users	Rating
Local	Municipal	The Woodlands Township Recreation Center	6														3	3	3	3	4	3	3	4	3.2
	Nonprofit	The Woodlands Children's Museum	6														3	3	3	3	3	3	3	3	3.0
	Commercial	The Children's Courtyard - The Woodlands	5														3	3	2	2	2	2	2	3	2.5
	Commercial	Northwoods School of the Arts*	4														2	2	2	2	2	2	2	2	2.0
	Commercial	Kids R Kids Learning Academy of The Woodlands	4														3	3	2	3	2	2	2	3	2.6
	Commercial	Kidville The Woodlands	4														3	3	2	2	2	2	3	3	2.6
	Nonprofit	The Woodlands Family YMCA at Shadowbend	3														3	3	3	2	3	3	3	3	2.9
	Municipal	South County Community Center*	3														2	2	3	2	3	3	2	3	2.4
	Municipal	MCMLS: George+Cynthia Woods Mitchell	3														3	3	3	3	4	4	3	3	3.2
	Municipal	MCMLS: South Regional	3														3	3	3	3	4	4	3	3	3.2
	Nonprofit	The Woodlands Family YMCA at Branch Crossing	2														3	3	3	2	3	3	3	3	2.9
	Nonprofit	The Woodlands Academy of Fine Arts (The Woodlands UMC)	2														3	3	3	3	2	3	2	3	2.8
	Nonprofit	Interfaith of The Woodlands	2														2	3	3	3	4	4	2	3	2.9
	Commercial	Patricia's Dance Lessons	1														3	2	2	2	2	2	2	2	2.2
	Commercial	InStep Dance Center	1														2	2	2	2	2	2	2	3	2.1
	Commercial	Country Dance Houston	1														2	2	2	2	2	2	3	2	2.1
	Commercial	The Woodlands Dance Center	1														2	2	2	2	2	2	2	2	2.0
	Commercial	Dance With Me Woodlands	1														3	2	2	2	2	2	3	3	2.4
	Commercial	Payne Academy of Performing Arts*	1														2	2	2	2	2	2	2	2	2.0
	Commercial	Fred Astaire Dance Studio - The Woodlands	1														3	2	2	2	2	2	2	2	2.2
	Commercial	Boni's Dance+Performing Arts Studio	1														2	2	2	2	2	2	2	3	2.1
	Commercial	Wedding Dance to Remember*	1														2	2	2	2	2	2	2	2	2.0
	Commercial	The Woodlands Academy of Music	1														2	2	2	2	2	2	2	3	2.1
	Commercial	Hall's Musik Studio*	1														2	2	1	1	1	2	2	2	1.7
	Commercial	Prelude Music Classes for Children	1														2	2	2	2	2	2	2	2	2.0
	Commercial	School of Rock The Woodlands*	1														2	3	2	3	2	2	3	2	2.4
	Commercial	Pinot's Palette The Woodlands	1														3	2	2	2	2	2	3	2	2.3
	Commercial	Potteryland Studio	1														3	2	2	1	2	2	3	2	2.2
	Commercial	Young Artist Art Studio*	1														3	2	1	1	1	2	2	1	1.8
	Nonprofit	Proto Makerspace	1														2	3	2	4	2	3	2	2	2.5
	Commercial	ONLC Training Centers - The Woodlands	1														2	2	1	4	1	2	2	2	2.0

58% 32% 13% 42% 26% 3% 35% 81% 68% 10% 3% 13% 84%



# Local + regional participatory programs

## The Woodlands Local + Regional Participatory Program Facilities

### Program facilities within 20 miles of The Woodlands

	Type	Facility	Disciplines Supported	Program Disciplines						Target Age Group			Frequency of Offerings			Facility Rating									
				Dance	Music	Theatre/Acting	Visual Arts	Tech/Digital Media	Food/Cooking	Other	Family/Youth	Adult	Senior	Low	Medium	High	Building Condition	Staff and Support	Program Space	Technology	Customer Amenities	Accessibility	Atmosphere/Character	Suitability for Users	Rating
Regional	Municipal	C.K. Ray Recreation Center	4														4	3	4	2	4	3	3	4	3.4
	Municipal	MCMLS: Central Branch	3														3	4	3	4	4	4	3	4	3.6
Nonprofit	Tamina Community Center*	2															2	2	3	2	3	4	2	3	2.5
	Municipal	Lone Star College - Montgomery	2														3	4	3	4	3	3	3	3	3.3
Municipal	Oscar Johnson Jr. Community Center	2															3	3	3	3	4	3	3	4	3.2
	Commercial	Extreme Performing Arts Center	1														2	2	2	2	2	2	2	2	2.0
Commercial	A Time to Dance Conroe	1															2	2	2	2	2	3	2	2	2.1
	Commercial	Backstage Dance Studio	1														2	2	2	2	2	2	2	2	2.0
Commercial	Starbound Dance Troupe	1															2	2	2	2	2	2	2	2	2.0
	Commercial	Dance Studio 105	1														2	2	3	2	2	2	2	2	2.1
Commercial	The Art of Music Studio*	1															2	2	1	2	2	2	2	2	1.9
	Commercial	Doris Lum Piano Studio	1														2	2	1	1	1	2	2	3	1.8
Nonprofit	Conroe Art League	1															3	3	3	2	2	3	3	3	2.8
	Municipal	Lone Star College - North Harris	5														3	4	3	4	3	3	3	3	3.3
Municipal	Lone Star College - University Park	4															3	4	3	4	3	3	3	3	3.3
	Commercial	John Lansch Studio for Actors	1														2	2	1	1	1	2	2	2	1.7
Commercial	Vino Artino	1															3	2	2	2	2	2	2	2	2.2
	Commercial	Art Class + Wine Glass	1														3	2	2	2	2	2	2	2	2.2
Commercial	Merlot 2 Masterpiece - Jersey Village*	1															2	2	2	2	2	2	2	2	2.0
	Commercial	Kingwood Music School	1														2	2	2	2	2	2	2	3	2.1
Municipal	Lone Star College - Kingwood	5															3	4	3	4	3	3	3	3	3.3
	Commercial	School of Rock Kingwood*	1														2	3	2	3	2	2	2	3	2.4
Commercial	Pianicity	1															3	2	1	2	2	2	2	3	2.2
	Nonprofit	Christian Youth Theater (Legacy Christian Academy)	3														3	3	3	3	2	2	2	3	2.7
Municipal	MCMLS: Malcom Purvis Library	3															3	3	3	3	4	4	2	3	3.1
	Commercial	Academy of Performing Arts/Lone Star Jazz*	2														2	2	2	2	2	2	2	2	2.0
Commercial	Lake Houston Performing Arts Center	1															3	2	3	2	2	2	2	3	2.4

# Local + regional participatory programs

## The Woodlands Local + Regional Participatory Program Facilities

Program facilities within 20 miles of The Woodlands

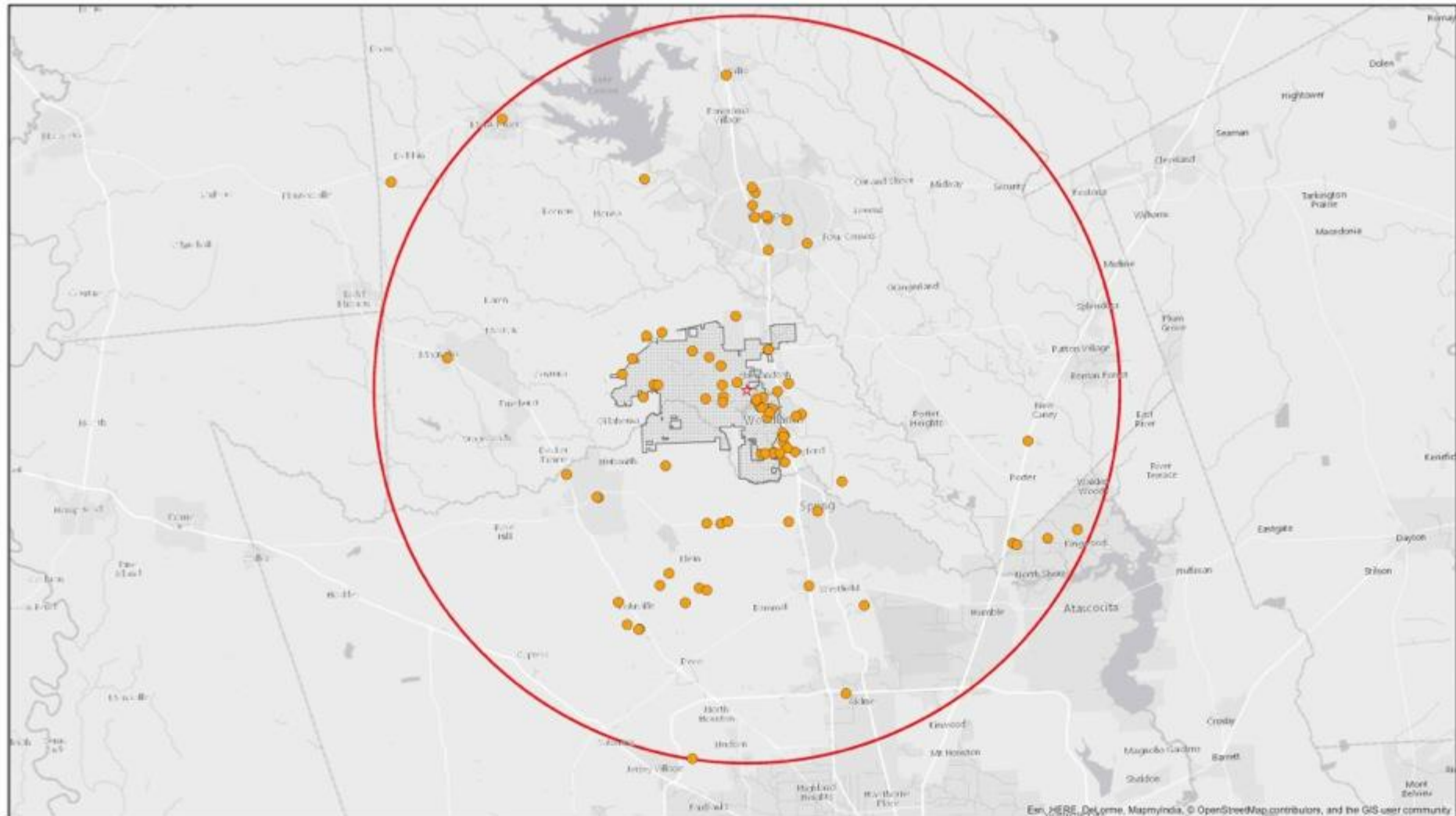
Type	Facility
Commercial	Arbor Music
Commercial	Paint+Bubbles Studio*
Municipal	MCMLS: Charles B. Stewart - West
Municipal	MCMLS: R.B. Tullis
Commercial	Texas Academy of Dance Arts
Commercial	Arthur Murray Dance Studio The Woodlands
Commercial	The Little Gym of The Woodlands
Nonprofit	National Youth Theater (Wildwood UMC)
Commercial	Language Arts Academy*
Commercial	Spring Cypress Dance Center
Commercial	Vicki Michelle Dance Studio
Commercial	Progressions Performing Arts
Commercial	Dance Dynamics
Commercial	North Harris Performing Arts
Commercial	Excelsior School of Dance
Commercial	Rhythm Music School
Commercial	Zuniga School of Music
Commercial	Firehouse Music*
Commercial	Next Level Acting Studios
Municipal	Spring Creek Greenway Nature Center
Commercial	The Woodlands Academy of Art
Commercial	Painting with a Twist - The Woodlands
Commercial	Merlot 2 Masterpiece - Spring/Klein*
Commercial	Chloe's Closet Art Studio
Commercial	Mossrock Studio+Fine Art Gallery
Commercial	Meal Masters
Commercial	Main Course Cooking School
Municipal	Tomball Community Center
Municipal	Lone Star College - Tomball
Commercial	Allegro Violin School
Commercial	Tomball Rocks*
Municipal	MCMLS: R.F. Meador

\*indicates an estimate

Disciplines Supported	Program Disciplines							Target Age Group			Frequency of Offerings			Facility Rating								
	Dance	Music	Theatre/Acting	Visual Arts	Tech/Digital Media	Food/Cooking	Other	Family/Youth	Adult	Senior	Low	Medium	High	Building Condition	Staff and Support	Program Space	Technology	Customer Amenities	Accessibility	Atmosphere/Character	Suitability for Users	Rating
1														2	3	2	3	2	2	2	3	2.4
1														3	2	1	1	1	2	2	1	1.8
3														3	3	2	3	4	4	2	3	3.0
3														3	3	3	3	4	4	4	3	3.3
1														3	2	2	2	2	2	3	3	2.4
1														3	2	2	2	2	2	2	2	2.2
3														3	3	2	2	2	2	2	3	2.5
3														3	2	3	3	2	2	2	3	2.5
3														3	2	2	2	2	2	2	3	2.3
1														2	2	2	2	2	2	2	3	2.1
1														2	2	2	2	2	2	2	2	2.0
1														2	2	2	2	2	2	2	2	2.0
1														2	2	2	2	2	2	2	2	2.0
1														2	2	2	2	2	2	2	2	2.0
1														2	2	2	2	2	2	2	2	2.0
1														2	2	2	2	2	2	2	2	2.0
1														2	2	1	3	2	2	2	2	2.0
1														2	2	1	1	1	2	2	2	1.7
1														2	3	2	3	1	2	2	2	2.2
1														2	2	1	2	2	2	2	2	1.9
1														3	2	3	2	2	3	3	3	2.6
1														2	2	1	2	2	2	2	2	1.9
1														2	2	2	2	2	2	2	2	2.0
1														2	2	2	2	2	2	2	2	2.0
1														2	2	2	1	2	2	3	2	2.0
1														3	2	1	1	1	2	2	2	1.9
1														2	2	2	2	3	2	2	3	2.2
1														3	2	3	3	2	2	3	3	2.6
3														2	2	3	3	3	3	2	3	2.5
3														3	4	3	4	3	3	3	3	3.3
1														2	2	1	1	1	2	2	2	1.7
1														2	2	2	2	2	2	2	2	2.0
3														3	3	2	3	4	4	2	3	3.0
	37%	36%	8%	39%	15%	5%	27%	80%	68%	12%	8%	19%	73%									

37% 36% 8% 39% 15% 5% 27% 80% 68% 12% 8% 19% 73%

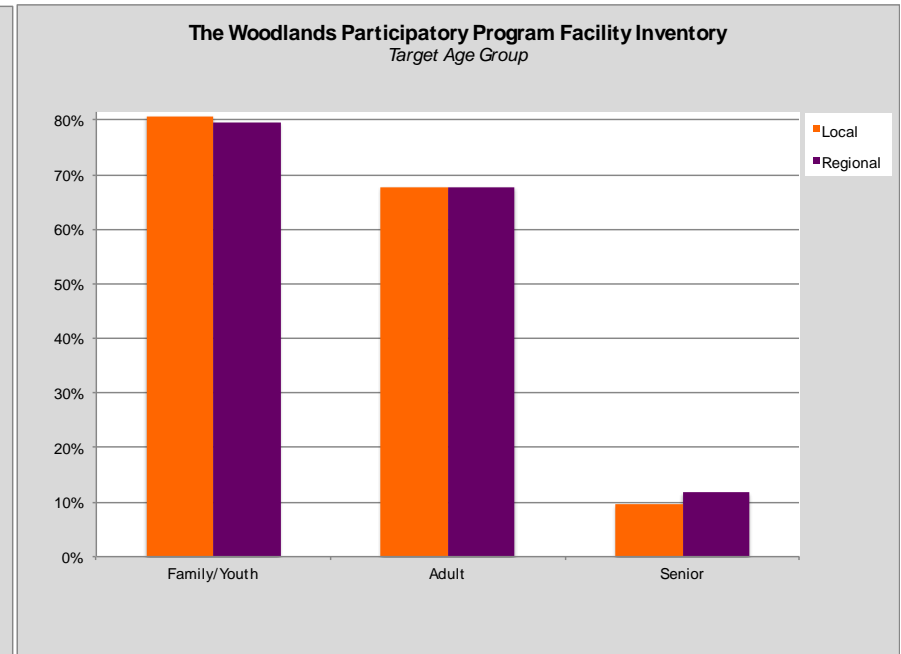
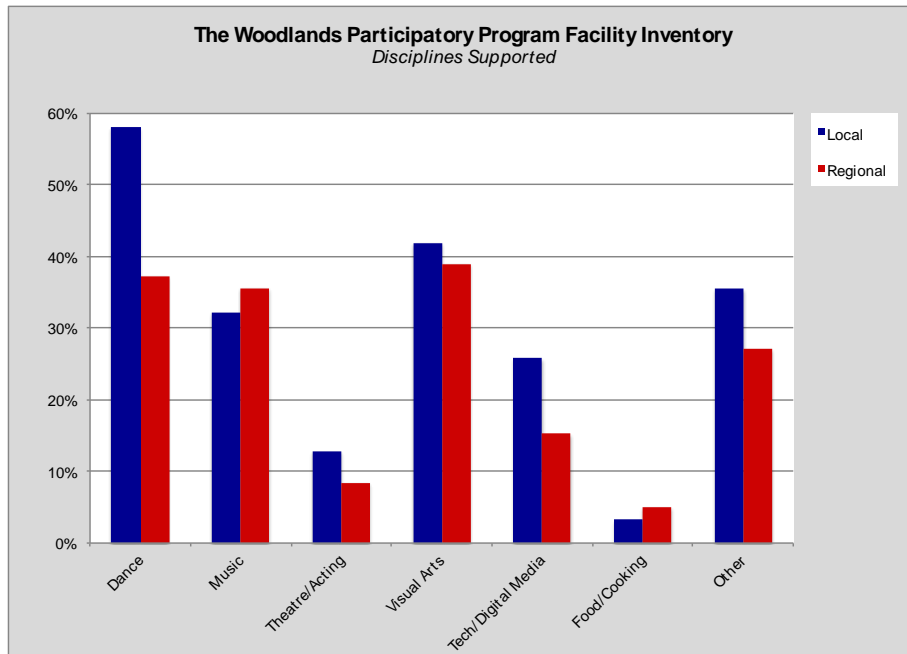
# Local + regional participatory programs inventory



# Local + regional participatory programs inventory

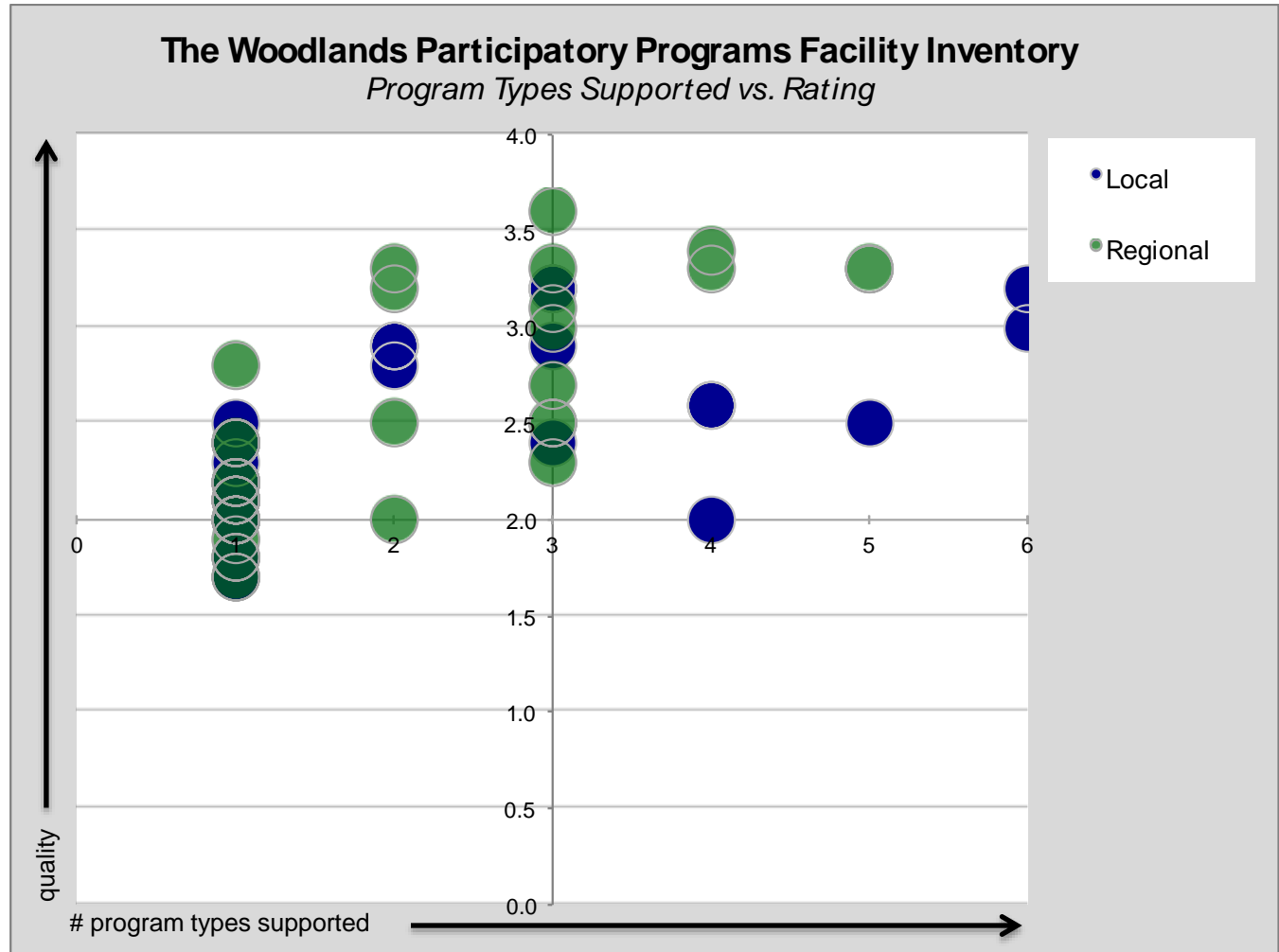
## Discipline + Target Age Group

- \* In The Woodlands, majority (58 percent) of participatory program spaces offer dance programs. Twenty-six percent offer visual arts classes.
- \* The fewest facilities, both locally and regionally, offer theatre/acting or food/cooking classes.
- \* Programs are primarily oriented towards family/youth, although 68 percent of local and regional facilities offer programs for adults.
- \* There are the fewest number of offerings for seniors.



# Local + regional participatory programs inventory

- \* The matrix, like the matrix for museums and galleries, plots local and regional program spaces by their quality rating and the number of programs they support.
- \* It indicates that the quality of facilities vary, but that program facilities in The Woodlands have slightly lower ratings.
- \* It also indicates that most facilities offer only offer programming in one discipline.
- \* Based on this matrix, we can say that there is an opportunity for a high-quality, multi-disciplinary art space in The Woodlands.



# Local + regional meeting + event facilities

## Methodology

- \* The Woodlands Local + Regional Meeting + Event Facilities Inventory inventories 23 meeting and event facilities with capacities of 500 or more.
- \* Here, the condition and functionality of each facility has been rated according to three variables. They are:
  - \* Facility condition,
  - \* Staff and support, and
  - \* Functionality/features.
- \* Variables are rated on a scale of 1 to 4, with the higher score being better.
- \* Ten of the inventoried facilities are located in The Woodlands and 13 are located within 20 miles of The Woodlands.
- \* The facilities range in capacity from 500 to 4,500 for a reception and 418 to 4,900 for an event with theater seating.



# Local + regional meeting + event facilities

The Woodlands Local + Regional Meeting+Event Facilities

Indoor venues within 20 miles of The Woodlands with capacities of 500+

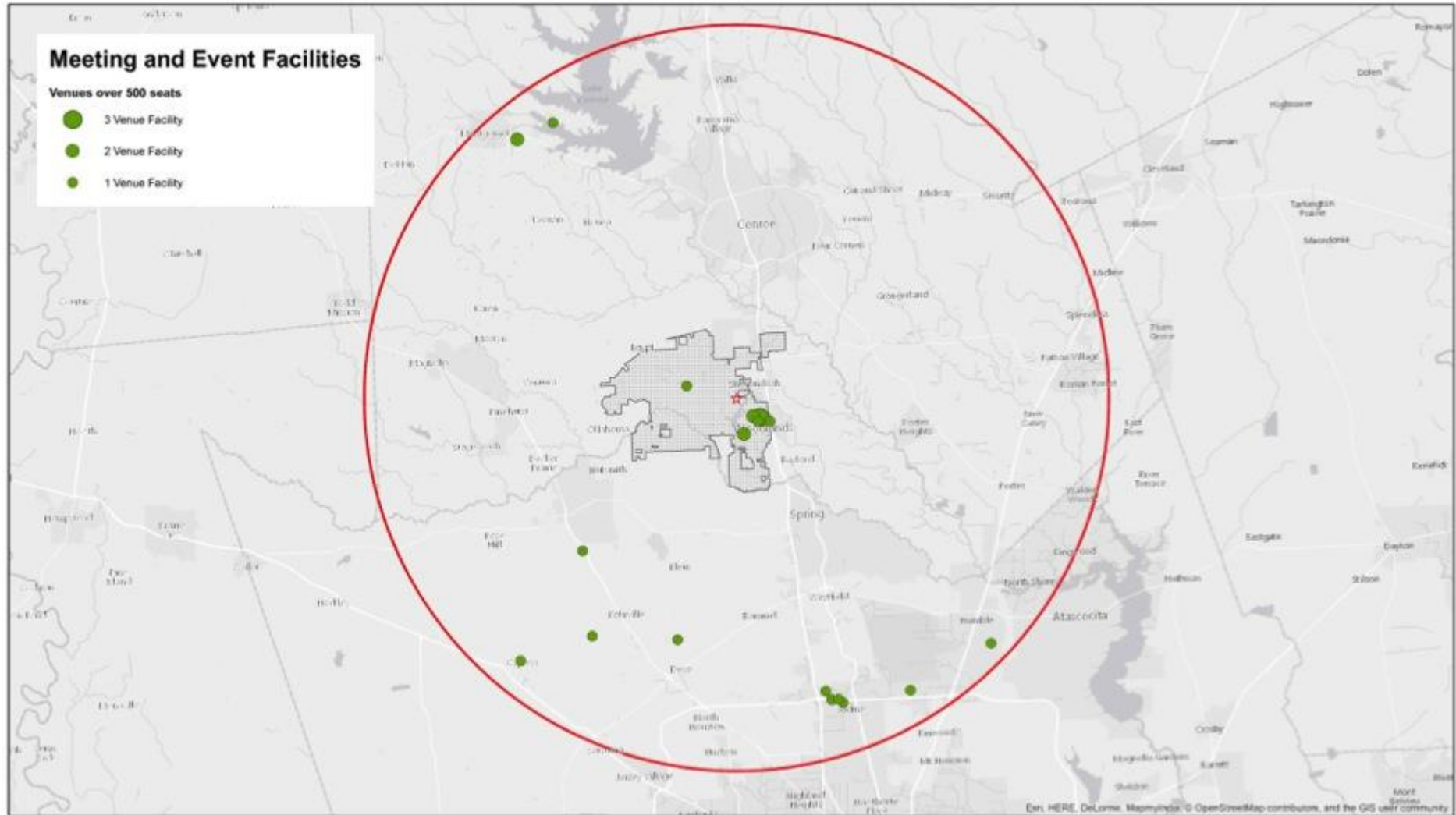
Local	Type	Facility	Facility Condition				Average Rating																Total
			Staff+Support	Functionality/Features				Reception	Theater	Banquet	Conference	Classroom	Other Event/Meeting Rooms	Lighting Equipment	Sound Equipment	Projection Equipment	Internet/Wi-fi	On-site Catering	Outside Catering Allowed	Available Commercial Kitchen	Available Warming Kitchen		
	Hotel	The Woodlands Waterway Marriott: Town Center Exhibit Hall	3	3	3	3.0	4,500	4,900	3,000	-	2,300										6		
	Hotel	The Woodlands Waterway Marriott: Waterway Ballroom	3	3	3	3.0	2,400	2,430	1,800	-	1,100										6		
	Hotel	The Woodlands Waterway Marriott: Montgomery Ballroom	3	3	3	3.0	520	540	320	-	200										6		
	Hotel	The Woodlands Resort + Conference Center: Grand Ballroom	3	3	3	3.0	1,240	1,240	980	-	560										6		
	Hotel	The Woodlands Resort + Conference Center: The Woodlands Ballroom	3	3	3	3.0	600	600	430	-	280										6		
	Event	Cynthia Woods Mitchell Pavilion Event Center: Encore Suite	3	3	3	3.0	897	334	290	-	-										6		
	Event	Cynthia Woods Mitchell Pavilion Event Center: Ovation Suite	3	3	3	3.0	864	330	270	-	-										6		
	Hotel	The Westin at The Woodlands: Edgewater Ballroom	3	3	3	3.0	609	609	320	-	224										6		
	Event	Bowlero Woodlands*	3	3	2	2.7	500	418	-	-	-										3		
	Private Club	The Woodlands Country Club: Legacy Ballroom	3	3	3	3.0	500	500	384	72	168										5		
												80%	90%	100%	90%	100%	100%	0%	0%	0%			
Regional	Hotel	Hilton Houston North: Raphael Ballroom	3	3	3	3.0	2,000	1,450	1,200	-	900										5		
	Event	Humble Civic Center: Ballroom 1	2	2	3	2.3	2,000	1,600	1,000	-	800										6		
	Event	Lake Conroe Event Center: Grand Ballroom	2	2	3	2.3	1,500	-	800	-	-										4		
	Event	Lake Conroe Event Center: Ballroom	2	2	3	2.3	700	-	400	-	-										4		
	Event	Enchanted Cypress: Grand Ballroom	3	3	3	3.0	1,200	640	-	-	-										6		
	Event	Tin Hall (Relocation pending)*	2	2	2	2.0	1,200	-	-	-	-										3		
	Event	Sans Souci Ballroom	3	3	3	3.0	1,000	-	1,000	-	-										4		
	Hotel	Sheraton North Houston	3	3	3	3.0	900	1,000	560	-	580										5		
	Hotel	Park Inn Houston North	2	3	3	2.7	500	500	-	-	-										5		
	Hotel	Houston Marriott North: Texas Ballroom	3	3	3	3.0	800	700	530	-	450										5		
	Hotel	Hyatt Regency North Houston: Grand Ballroom	3	3	3	3.0	700	700	450	-	325										5		
	Hotel	La Torretta Lake Resort+Spa	3	3	3	3.0	840	840	-	-	-										6		
	Event	Chateau Cocomar: Salle de Versailles*	3	3	3	3.0	550	500	350	50	220										3		
													85%	54%	77%	69%	46%	62%	38%	23%	15%		
		*Some capacities and/or features estimated						Capacities					85%	54%	77%	69%	46%	62%	38%	23%	15%		

\*Some capacities and/or features estimated

Capacities



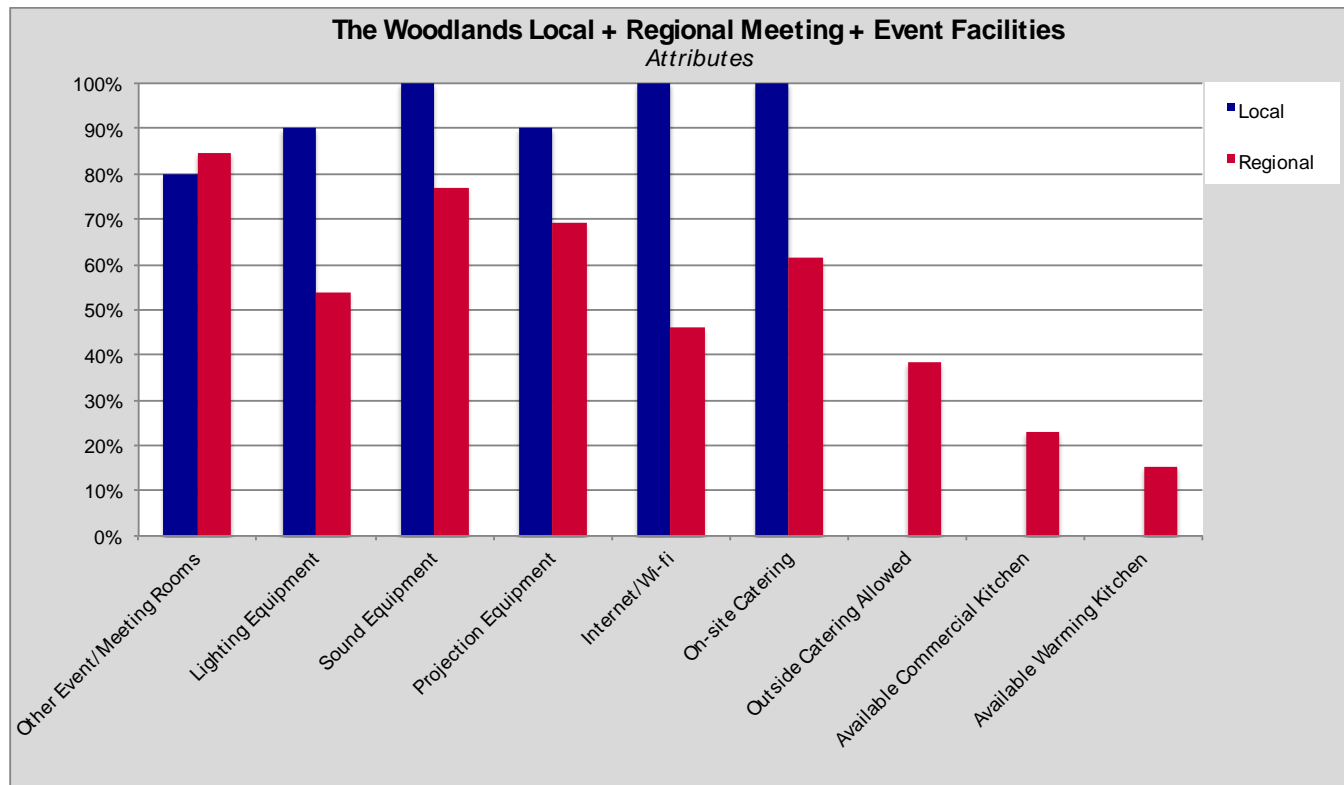
# Local + regional meeting + event facilities





## Local + regional meeting + event facilities

- \* Meeting and event facilities in The Woodlands are very well equipped: all of them have sound equipment, internet/wi-fi, and on-site catering and most have lighting and projection equipment.
- \* Regionally, meeting and event facilities offer customers greater variety when it comes to food. While 60 percent have on-site catering, 38 percent allow outside caterers, 23 percent have a commercial kitchen available, and 15 percent have an available warming kitchen. Our experience working on other projects indicates that these attributes are particularly important to ethnically and culturally specific community groups, as they often like to have use their own caterers or bring food that is prepared at home.



# Local + regional meeting + event facilities

- \* The inventoried meeting and event facilities have been plotted on this chart according to their capacities and qualities.
- \* Most are very highly rated and accommodate between 500 and 1,500 people.
- \* The size of each circle correlates with the number of features or attributes the facility has.
- \* Twelve of the inventoried facilities are hotels and 10 are event spaces.



# Facility inventory conclusions

## The Woodlands Local + Regional Performance Facilities Inventory

- \* Presenting activity in The Woodlands and the region is music heavy. Outside of music, there are very few other presented art forms.
- \* Facilities are active producers of arts activities, especially educational/academic programs, theatre, and music.
- \* Locally and regionally, facilities lack orchestra pits, fly space, and wing space, although they tend to have rehearsal/program space, event space, kitchen facilities, and flexible seating.
- \* Facilities tend to be well equipped. There are gaps, however, in ticketing services, film/projection equipment, and the service of alcohol.
- \* Generally, facilities have lower quality ratings and very limited availability, indicating an opportunity for high-quality performance space.

## The Woodlands Local + Regional Museums + Galleries Inventory

- \* Museums and galleries are primarily focused on the visual arts. Very few engage with history/culture and, with the exception of some programming at The Woodlands Children's Museum, none engage with science/living collections.
- \* Museums and galleries offer limited programming. Participatory visual arts and crafts programs are offered in the most facilities.
- \* Most facilities have classroom/studio space, but none have an auditorium/lecture hall.
- \* Locally, facilities are lacking a library/research archives, retail space, and a café/restaurant.
- \* In The Woodlands, museum and gallery spaces are lower in quality, highlighting an opportunity for a high quality space, particularly in the area of science or history.



# Facility inventory conclusions

## The Woodlands Local + Regional Participatory Program Facilities Inventory

- \* Hands-on and participatory programming in The Woodlands is dance oriented. Locally and regionally, though, there are opportunities for programs in theatre/acting and food/cooking.
- \* Programming is heavily geared towards family and youth and, to a lesser extent, adults. Very few facilities offer programs to seniors.
- \* The matrix indicates that local facilities have slightly lower quality ratings than regional facilities, indicating an opportunity for a high-quality facility that offers a range of programs.

## The Woodlands Local + Regional Meeting + Event Facilities Inventory

- \* Meeting and event facilities in The Woodlands are very well equipped. Regional facilities, however, provide users with more options in terms of catering.
- \* Nearly all of the inventoried facilities have high quality ratings and most have capacities below 1,500 seats.



# Benefits + impacts



# Benefits + impacts

## Overview

- \* Investing in arts and culture can have significant impact on a community, contributing to such things as sense of place, quality of life, and neighborhood and community development.
- \* In this section, we will look at the Township's goals for the future of The Woodlands and the role that investing in arts and culture in can play in advancing them.



## Benefits + impacts

- ✧ ***Vision 2034: The Woodlands Township Strategic Plan (July 2014)*** was developed to keep The Woodlands Township on track during a period in which how the community was governed, funded, and providing services and amenities was changing. Established within the plan is a vision for The Woodlands, describing the community as a place where man and nature are balanced and “generations live, worship, work, learn, and play.” It also identifies eight focus areas for Township activities: Service Delivery, Communications, Organizational Support, Governance, Economic Development, Transportation and Mobility, Environmental Sustainability, and Fiscal Policy. Within these focus areas are a number of goals, including:
  - ✧ To provide special event opportunities that foster community spirit, family values, and healthy lifestyles;
  - ✧ To identify and establish alliances with organizations that will help the Township achieve its vision and carryout its mission as needs arrive;
  - ✧ To attract, retain, and promote high quality businesses;
  - ✧ To encourage the expansion of employment and education opportunities;
  - ✧ To support events, venues, and programs to bring visitors to The Woodlands;
  - ✧ To support public/private partnerships to increase visitors;
  - ✧ To expand, support, and create new cultural, sporting, and entertainment venues;
  - ✧ To expand Hotel and Occupancy Tax revenues and tax base; and,
  - ✧ To produce and sponsor high quality community events.

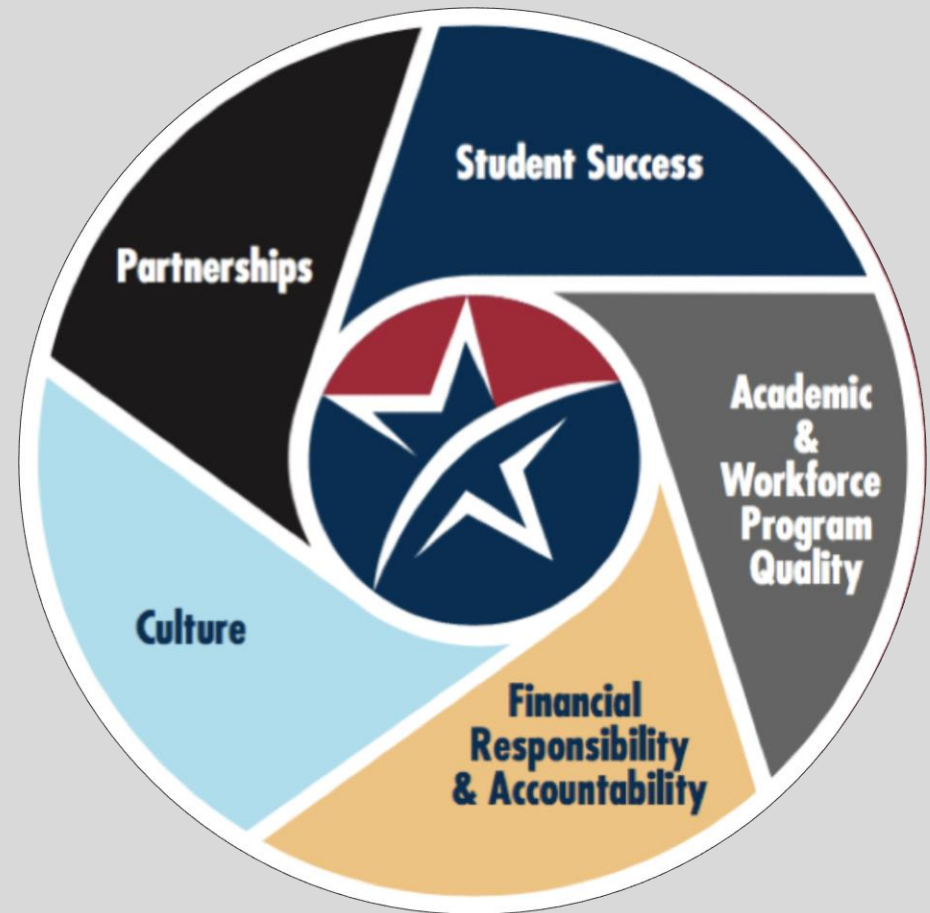


## Benefits + impacts

\* The **Lone Star College Strategic Plan 2015-2020 (2015)** was developed to provide the community college's six campuses with a clear course of action for the future. It has five guiding principles (access and equity, student learning and success, dignity and respect, community value, and responsibility) through which five strategic goals were defined (pictured right). Each of those goals has a series of sub-goals, many of which are relevant to this project include:

- \* "Develop and promote programs based on the workforce and community needs to increase entry into workforce programs;
- \* Expand revenue streams by exploring creative ways to fund our institution;
- \* Implement initiatives to foster a sense of belonging and make students and employees feel proud to be part of Lone Star College;
- \* Identify and grow partnerships with business and industry sectors to collaborate on workforce training, job placement, funding, and resources;
- \* Strengthen and expand partnerships with the community organizations for civic engagement, community services, and community support;
- \* Increase partnerships with local, state, national, and international organizations to create collective impact on student success.

### Lone Star College 2015-2020 Strategic Goals





# Benefits + impacts

\* Other benefits and impacts include:

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



# Conclusions + recommendations



# Conclusions

- \* All of this research indicates that there is a case to develop cultural facilities in and for The Woodlands based on:
  - \* **The Market:** The local market is growing, affluent and well-educated, indicating a propensity to support the traditional performing arts and culture. Locally and regionally, the population is diverse and family oriented, indicating opportunities for hands-on, participatory, and culturally-specific programming. In addition, The Woodlands is a strong entertainment market seen by visitors as a 'place to get away'. This is further evidence by Americans for the Arts findings, which estimate that Montgomery County residents spend nearly 20 percent more than the county average on attending popular entertainment.
  - \* **Community Support + User Demand:** The community survey indicates that there is strong support for new cultural facilities. In addition, our summary of demand indicates that community users have 1,059 days of demand for space, particularly a space with 500 or fewer seats (765 days of demand). There is also demand for small performance and rehearsal space (166 days), exhibition space (830 days), and classroom space (4,614 hours).
  - \* **Facility Supply:** The facility indicates that there are opportunities for high-quality arts and cultural spaces. In particular, performance space, a science (or history) oriented museum, and programming space.
  - \* **Benefits + Impacts:** The Woodlands would benefit from the presence of cultural programs and facilities in terms of harnessing community spirit, attracting businesses to the community, and expanding the Hotel and Occupancy Tax. Further, a strong cultural community enhances sense of place and quality of life, attracts a quality workforce, enhances neighborhood and community development, and contributes to the teaching of innovation and creativity.



# Recommendations

Based on these conclusions, we believe that there are a number of projects that are feasible and have a strong probability of success. These are:

- A. Nonprofit performance, rehearsal, and teaching spaces
- B. Nonprofit exhibition space
- C. Local museum
- D. Nature/science museum
- E. Event and exhibit hall
- F. Digital media center
- G. Culinary Institute
- H. Center for arts and healing
- I. Neighborhood-based program spaces

We do not think of this as a menu from which projects could be selected, but rather the comprehensive set of facilities that can and should be developed over time.



## A. nonprofit performance, rehearsal + teaching spaces

- \* This recommendation is for a set of facilities that respond to local and regional demand for performance, rehearsal, and teaching spaces.
- \* Such a facility does not currently exist in the region and will serve the cultural development of The Woodlands.



**recommendation a, example 1: Midtown Arts + Theater Center Houston | Houston, TX**

- \* Midtown Arts + Theater Center (MATCH) opened in 2015 as a home and hub for Houston's numerous arts groups.
- \* The project developed out of a grassroots effort led by four arts organizations that were in need of a centralized space where they could work together and build synergy.
- \* MATCH is comprised of two buildings that are separated by a breezeway. The buildings include:
  - \* Four performance spaces: Three flexible black box theaters, one of which is intended primarily for dance groups (caps. 100-159) and a 329-seat proscenium with adaptable acoustics;
  - \* Three rehearsal studios;
  - \* 3,000 square feet of gallery space; and,
  - \* Offices for up to 60 arts professionals.
- \* Activities that can be found at MATCH include dance, music, theatre, visual art, film, lectures/speakers, and performance art.
- \* The facility is currently in the midst of a build out for a food-service area.





**recommendation a, example 2: Metropolitan  
Community College-Longview Cultural Arts  
Center, Lee's Summit, MO**

- \* The Cultural Arts Center at MCC-Longview was completed in 2008.
- \* The facility aims at being a home for the arts for both the community college and the City of Lee's Summit.
- \* In addition, it is a FEMA-certified disaster relief shelter, one of the only facilities of its kind in the Kansas City metropolitan area.
- \* The facility's calendar is filled with the activities of the MCC-Longview Speech and Theater program as well as productions by the local, nonprofit theatre company, Summit Theatre Group, and performances by the Kansas City Chapter of the Sweet Adelines.
- \* Facilities include a 180-seat theater, a black box, a dance studio, and a gallery.



## B. nonprofit exhibition space

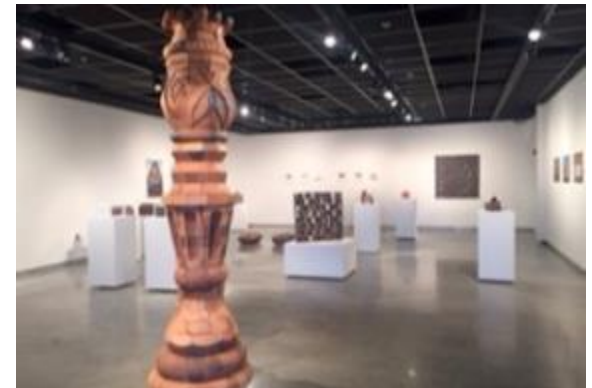
- \* In addition to nonprofit performance space, we also recommend the creation of a nonprofit exhibition space to showcase local and regional nonprofit artists.
- \* Such a facility could be developed on its own or, more likely, as part of a larger project.





**recommendation b, example 1: : Metropolitan  
Community College-Longview Cultural Arts  
Center Gallery, Lee's Summit, MO**

- \* The Cultural Arts Center Gallery at MCC-Longview was completed in 2008.
- \* Its aim is to provide a conceptually challenging and educational venue for students, faculty, and community members.
- \* Exhibited in the gallery are works by students and faculty as well as regional and national artists.
- \* There are seven exhibits each year, including a juried show of work by local high school students.



**recommendation b, example 2: Gallery  
2014 | Hollywood, FL**

- \* Gallery 2014 is a nonprofit gallery that was founded in 2012.
- \* The gallery works to advance the arts in Hollywood by providing a forum to young and emerging artists.
- \* In addition to gallery space, the facility includes a studio space for an artist-in-residence and educational space for classes, live studio sessions, and seminars.



## C. a local museum

- \* As a master planned community, The Woodlands has a unique history. A small museum aimed at telling The Woodlands story and, with the community's help, capturing it as it evolves is a way to celebrate The Woodlands and engage residents in a community-building process.





**recommendation c, example: Livsreise  
Norwegian Heritage Center | Stoughton, WI**

- \* Livsreise opened in 2015 and was created to share and explore Stoughton's Norwegian identity and culture.
- \* The facility features interpretations of the immigrant journey from Norway to Stoughton, stories of individual immigrants, and exhibits and displays highlighting Norwegian heritage.
- \* Facilities include permanent and temporary exhibition space, a 68-seat auditorium, and a genealogy center.
- \* Interestingly, the museum was intentionally designed without a gift shop or café/restaurant in order to encourage visitors to patron its neighboring restaurants and small retailers.



## d. science/nature museum

- \* Our previous work in The Woodlands recommended that the Township work with the Houston Museum of Nature and Science to develop a satellite location. While the concept was strongly supported, the Great Recession and changes in local priorities meant the project never came to fruition.
- \* Our research indicates that there is still an opportunity for such a project and that the Museum of Nature and Science is still interested in being involved with it.





**recommendation d, example: Houston  
Museum of Natural Science at Sugar Land |  
Sugar Land, TX**

- \* The Houston Museum of Natural Science's Sugar Land satellite opened in 2009.
- \* Originally built as the Main Unit of the Central State Prison Farm, the rehabilitated facility includes exhibits on dinosaurs and minerals, science labs, and a 2,000 gallon salt water aquarium.
- \* The Museum is open three days a week and is used for field trips, summer camps, private events, and weekend programs.
- \* HMNS at Sugar Land is one of two satellite facilities operated by the Houston Museum of Natural Science. The other is the George Observatory in Fort Bend County.



## E. event and exhibit hall

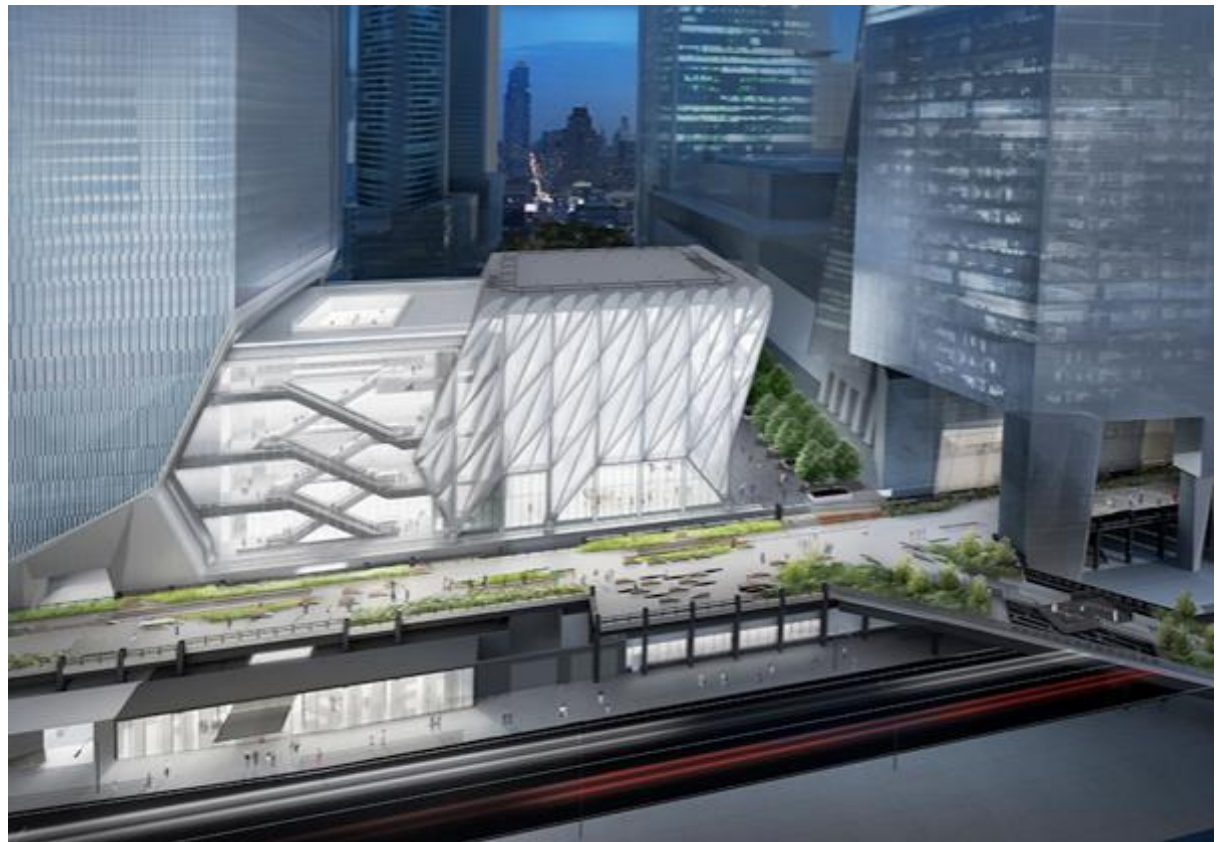
- \* This recommendation is for a large, open, and flexible space for events that range from large exhibits to community gatherings.
- \* A facility like this does not exist in The Woodlands, although it does share some similarities with the House of Blues/ice rink at the Cynthia Woods Mitchell Pavilion.





**recommendation e, example 1: The Shed |  
New York, NY**

- \* The Shed is a 200,000 square foot start-up conceived to accommodate evolving forms of artistic practice.
- \* Spread across six levels, the building will include two large-scale galleries; a 500-seat theater, event, and rehearsal space; a free lab for early career local artists; and a telescoping shell that reveals either a public plaza or a light, sound, and temperature-controlled hall that can seat 1,250.
- \* The building will open in 2019.
- \* A radically flexible facility, it is designed to accommodate visual and performing arts, fashion, design, publishing, broadcast, culinary arts, and so on.





**recommendation e, example 2: Kunsthalle  
München | Munich, DE**

- \* The Kunsthalle opened in 1985 and is operated by Hypo Cultural Foundation.
- \* In 2001, it moved into 12,000 square feet of a high-end, mixed-use, shopping complex in the center of Munich.
- \* Annually, it hosts three major exhibitions. Past exhibitions have included Jean Paul Gaultier, Keith Haring, Rembrandt, and O'Keeffe.
- \* In addition to fine art, Kunsthalle programming includes concerts, films, lectures, an art club, and classes and guided tours for kids.
- \* On the first floor, the Kunsthalle has a café, bar, and brasserie that is open to the public daily.



## f. digital media center

- \* Spaces for digital creativity (such as computer labs, spaces for recording and broadcast, equipment lending, and teaching) do not currently exist in The Woodlands. They are a great way to engage young people in culture and also support a business start-up and incubator culture.



**recommendation f, example 1: Media + Games  
Network, Polytechnic Institute of NYU |  
Brooklyn, NY**

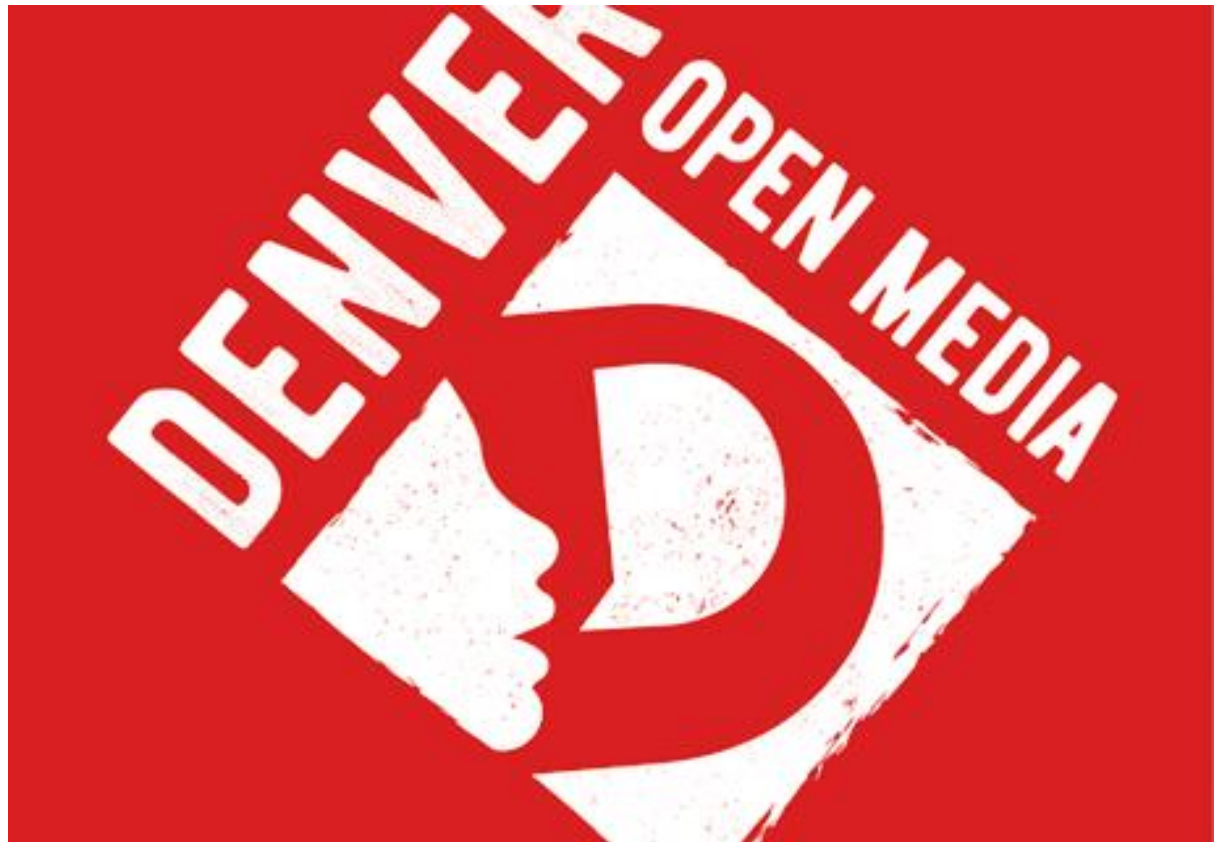
- \* The Media and Games Network at the Polytechnic Institute of NYU opened in the fall of 2013.
- \* It is a multi-school cluster examining intersections of technology and culture.
- \* Students study game design, digital media design, computer science, and engineering.
- \* Spaces include labs, multi-media classrooms, exhibition space, a theatre, an audio studio, a mixing booth, computing workspace, a lecture room, and human computer interaction labs.





**recommendation f, example 2: Denver Open Media | Denver, CO**

- \* Denver Open Media (DOM) is a project aimed at “putting the power of media in the hands of the community.” It is supported by the Open Media Foundation but intended to be managed by the community.
- \* DOM offers classes in video production and video post-production, digital audio production, 3-D animation, motion graphics, and TV broadcasting.
- \* Programming is shared over the internet on three community-programmed channels. Each channel is divided into theme blocks. Content producers choose the theme block and time during which they would like their show to air. Viewers are then invited to vote on the show, driving a smart scheduling algorithm that determines future broadcast dates and times.
- \* DOM has a membership program as well as studios and equipment that are for rent.
- \* Facilities include studios with robotic HD cameras and green screens, meeting rooms, a café, a learning lab, a board room and lounge, a multi-track recording studio, and nonprofit meeting space.



## G. culinary arts center

- \* Food is an inherent part of culture, and is important to The Woodlands community. A culinary arts center is a space in which new food styles and cuisines can be explored while raising awareness to local supply and agricultural issues. Facilities should include space for food preparation, teaching, and displays.



**recommendation g, example 1: MGM  
Resorts HCC Center for Hospitality +  
Culinary Arts, Holyoke, MA**

- \* The City of Holyoke, Holyoke Community College (HCC), and MGM Springfield have engaged in a community partnership to develop new training facilities in a former downtown factory.
- \* Located in Holyoke's downtown Innovation District, the project is expected to be completed this year.
- \* The Center will provide cutting edge culinary education facilities, hospitality simulation labs, and classrooms.
- \* Programs will include HCC's Hospitality Management and Culinary Arts programs, along with non-credit training programs in partnership with Springfield Technical Community College.
- \* Funding includes \$1.75M in state funding and \$1.55M from the US Department of Commerce.





**recommendation g, example 2: :  
Metropolitan Community College, Omaha,  
NE**

- \* The Culinary Arts and Management program at Metropolitan Community College includes culinary arts, hospitality, and horticulture studies.
- \* The Culinary Arts and Management degree program allows students to study to become chefs, culinarians, or professional bakers or pastry chefs.
- \* For students interested in culinary science but not a degree, the College's Continuing Education program offers courses in baking, cooking foundations, beverage pairing, and various cultural cuisines.
- \* Courses in the Continuing Education program are available to students of all ages.



## CULINARY

**Baking School: Custards & Fillings\***  
Join us for this in-depth workshop on creams, custards, fillings and glazes. Lunch is included. Also offered in this series: cookies, quick breads, pie & tarts, cake, pate choux, meringue and garniture. (one session)  
Fort Omaha Campus, Building 22, 30th and Fort streets  
COOK-1804-70 SA 08:00A-03:00P 03/25-03/26 \$75

**NEW! Breads: Sweet Doughs\***  
Just in time for Easter, learn to make soft, decadent breads—brioche, cinnamon buns and challah. Our focus will be enriched doughs, and the lessons of braiding and shaping. Lunch is included. (one session)  
Fort Omaha Campus, Building 22, 30th and Fort streets  
COOK-2004-70 SU 08:00A-03:00P 04/09-04/09 \$75

**Cuisines: Pizza\***  
Everyone gets to throw dough! We'll have a blast learning the basics of pizza making, including recipes for dough and sauce. (one session)  
Fort Omaha Campus, Building 22, 30th and Fort streets  
COOK-184N-70 T 06:00P-08:00P 04/11-04/11 \$50

**Cuisines: Irish\***  
Discover secrets passed down over generations just in time for St. Patrick's Day! We will prepare four classic Irish dishes, including corned beef and cabbage. (one session)

**Cuisines: Japanese Street Food\***  
Explore Japanese gastronomy fare with chef prepare classic tokayaki dishes and pair the sake. For adults 21 and over. (one session)  
Fort Omaha Campus, Building 22, 30th and Fort streets  
COOK-178N-70 F 08:00P-08:00P

**Foundations: Knife Skills\***  
If you want to be a home chef, you need to: Knife skills are the fundamental building blocks. (one session)  
Fort Omaha Campus, Building 22, 30th and Fort streets  
COOK-100N-71 T 06:00P-08:00P

**Baking: Layered Dessert Construction\***  
Learn the fundamentals of preparing and decorating cakes, tarts and berry tarts. (one session)  
Fort Omaha Campus, Building 22, 30th and Fort streets  
COOK-174N-70 TH 06:00P-08:00P

**NEW! Pairing Studio: Bourbon\***  
Enjoy a five-course meal paired with great T and spirit expert James will discuss, delectable, food affinity and flavor of these fine over to enroll. (one session)  
Fort Omaha Campus, Building 22, 30th and Fort streets  
COOK-199N-70 F 06:00P-08:00P



## H. healing arts center

- \* The healing arts is a growing discipline, and The Woodlands is becoming a medical hub with major hospitals coming online this year joining other long-time facilities. A healing arts center could include space for performance, teaching, exhibition, rehearsal and research on the relationship between health and the arts.





**recommendation h, example 1: Children's  
Healing Art Project | Portland, OR**

- \* An innovative healing arts program, CHAP works specifically with critically ill, chronically ill, and disabled children and their families to strengthen, encourage, and inspire.
- \* The organization has three primary programs: The In-Hospital Healing Art Program, the Art Club Program, and an Outreach program.
- \* Through CHAP's In-Hospital Healing Art Program, teaching artists lead art "adventures" in a variety of disciplines (beading, animation, puppet-making) in four Portland hospitals.
- \* The Art Club Program, which takes place at the CHAP headquarters, invites children to freely express themselves through creativity, often inviting participants to paint or draw on any surface they see.
- \* Through the Outreach program, CHAP partners with other community organizations on events. Past partners and events have included United Cerebral Palsy at their Walk, Roll, and Run event, and the Northwest Sarcoma Foundation Dragonslayer Bike, Trike, and Hike.



**recommendation h, example 2: UF Health Shands Art in Medicine + UF Florida Center for the Arts in Medicine | Gainesville, FL**

- \* UF Health Shands Art in Medicine (AIM) and the UF Florida Center for the Arts (Center) in Medicine is a pioneer in arts and medicine.
- \* AIM began with the work of two volunteer artists in the Bone Marrow Transplant Unit and was established as a program in 1990.
- \* Programming is extensive and includes the visual, literary, and performing arts, integrative medicine, and design + aesthetics.
- \* As AIM developed, more and more students in UF's arts programs began to inquire about independent study opportunities, prompting the Dean of the College for the Arts to propose the creation of a center. Thus, the Center for Arts in Medicine was officially formed in 1999.
- \* The Center's areas of focus include education and training, research, and outreach.





**recommendation h, example 3: University of Alabama at Birmingham Institute for Arts in Medicine | Birmingham, AL**

- \* In 2011, the Alys Stephens Center, UAB's performing arts center, received a grant to work with independent assisted living facilities, marking the Center's first foray into arts and medicine. A positive experience, the Center continued with the work beyond the duration of the grant.
- \* In 2013, the Global Alliance for Health (now defunct) awarded the Center a consultancy grant to invite someone from the University of Florida's Center for Arts in Medicine program to conduct a two-day training for people interested in working creatively in the healthcare environment.
- \* The Center then received a \$5K Innovation Grant from UAB's Innovation Board to develop a pilot program with UAB Medicine. The pilot involved 5 artists (all had completed the UF training as well as a general hospital training) working 2 hours per week in a specific hospital unit. Pre- and post-experience surveys were conducted at every visit asking patients to rate their perceived levels of pain and anxiety; found at 92% reduction in both.
- \* The full AIM program began in 2014.



## I. neighborhood-based program spaces

- \* This recommendation is not for a capital investment, but rather the deployment of staff, equipment, and policy to make existing spaces work for a range of cultural programs. The goal is to get more cultural activity out into existing facilities in the Villages and neighborhoods.



**recommendation i, example 1: Town of Oakville  
Culture and Recreation | Oakville, ON**

- \* The Town of Oakville has worked to spread cultural activity across the community.
- \* Examples of recent initiatives include:
  - \* **Musical Moments:** In partnership with a local music school, the Town placed six pianos that were painted by Oakville youth at various sites across the community. Community members were invited to play the pianos and share videos on the music school's website.
  - \* **Paint the Park:** A one-day event spread across six town parks, this event invites residents to choose a picturesque scene in a park and paint it. Paintings can be submitted for competition and the event is paired with live music and other happenings.
  - \* **Art Cart:** The Art Cart is a transportable cart that will be placed in a number of community centers and arenas this fall. It will feature rotating art activities for parents to participate in with their kids before and after programs or while waiting for siblings.



# OAKVILLE CULTURE

**Celebrate with us!**

**September 30 to October 2, 2016**

**Bigger and better Culture Days!  
Unique sites throughout Oakville.**

Enjoy free family-friendly entertainment, art workshops, dance, ceramics, live music and more. There's something for everyone!

**Visit [oakville.ca](http://oakville.ca) and search "culture days" for details.**



**recommendation i, example 2: Chicago Park District | Chicago, IL**

- \* The Chicago Park District is the largest system of parks in the country, having more than 570 parks spread across 8,000 acres.
- \* Nearly every park has a field house. While they vary in size and amenities, they are all activated in some way with cultural programming: theater classes, dance classes, sewing, cooking, train modeling, wood working, and so on.
- \* In addition to festivals and events, the Park District has developed three initiatives to activate its parks with arts and culture:
  - \* **Arts Partners in Residence:** Provides free space to artists in park field houses in exchange for weekly teaching and community engagement hours.
  - \* **Night Out in the Parks:** A summer-long event that activates the City's parks with more than 1,000, mostly free, cultural events and activities.
  - \* **Cultural Centers:** An initiative that has designated 15 field houses as community cultural centers.



## Assembling projects and finding partners

- \* In the following slides we suggest how these various components might be combined and advanced with a series of potential partners. These are not the only combinations, but rather a suggestion of possibilities that make sense today.



## Pieces

- NP Perform, rehearse, teach
- Nonprofit exhibit space
- Local history museum
- Museum of Science and Nature
- Exhibit + Event Hall
- Digital Media Center
- Culinary Arts Center
- Healing Arts Center
- Neighborhood Program Spaces

## Projects

- Performing Arts Center
- Arts District
- Community Arts Center and Library
- Events Center
- Museum of Science and Nature

## Partners

building creativity

- Private Developers**
- Lone Star or other College**
- The Woodlands Arts Council**
- Montgomery County**
- School Districts & Private Schools**
- Hospitals**
- Museum of Nature and Science**
- Cynthia Woods Mitchell Pavilion**



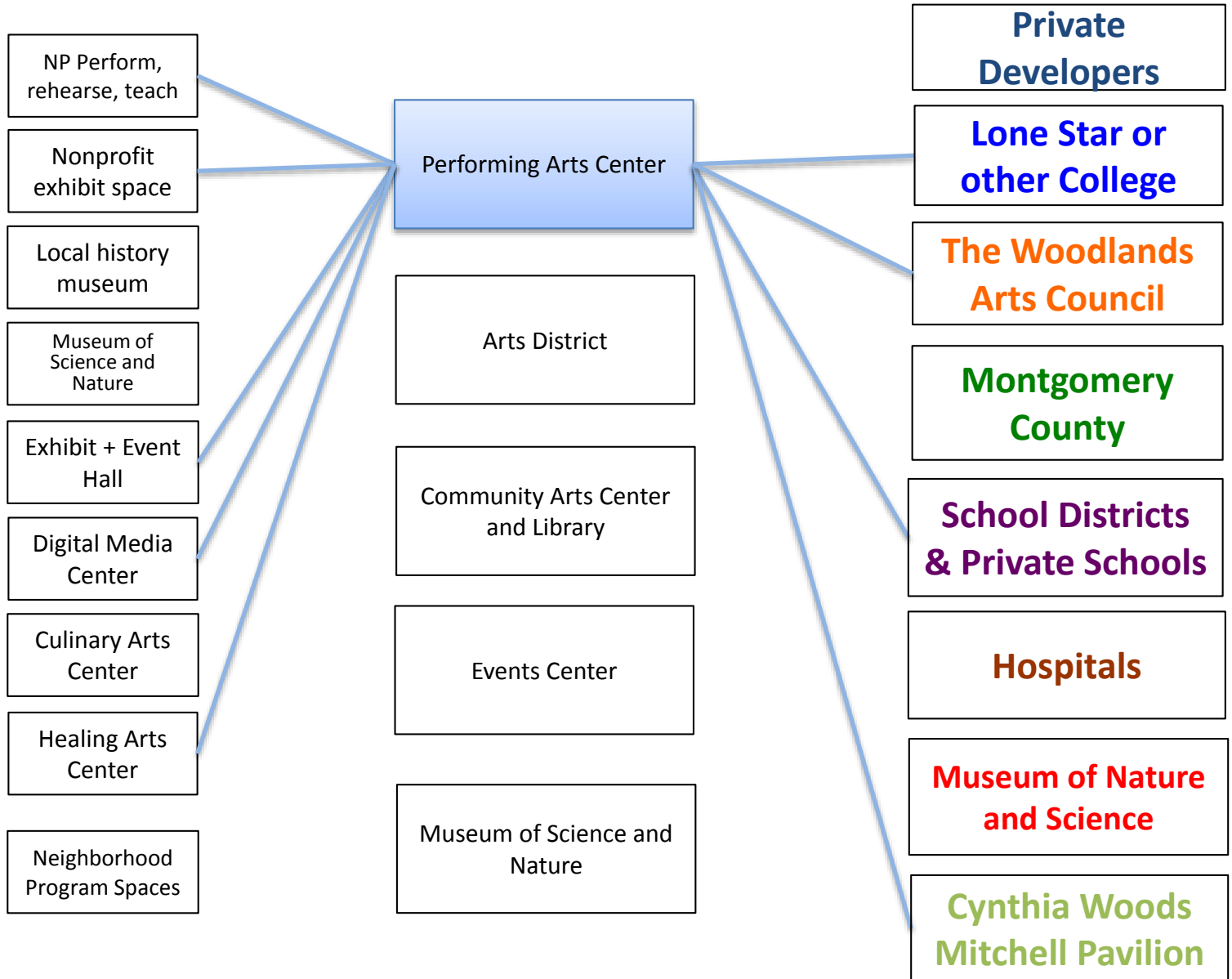


## Pieces

## Projects

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- Museum of Nature and Science
- Cynthia Woods Mitchell Pavilion



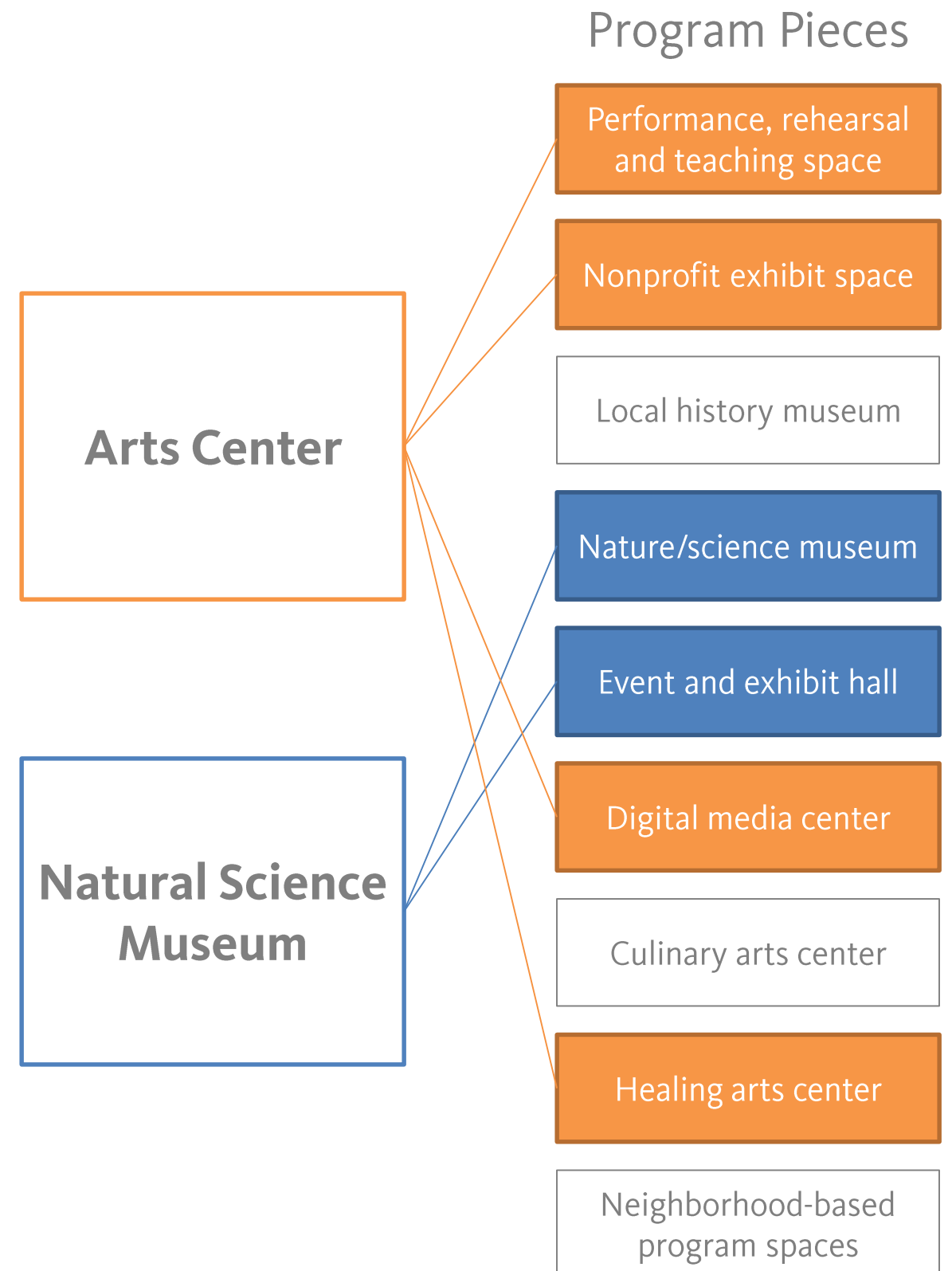
The Woodlands Township

# Cultural Facility Needs Assessment

Needs Assessment Project Recommendations  
June 01, 2017

## Recommended Projects:

- We recommend moving forward with the following projects for Phase Two:  
Project A: Arts Center  
Project B: Natural Science Museum
- There is a strong case for each of the projects as cultural anchors for the community – an arts center and a natural science museum.
- Both of these projects has the ability to be combined with other cultural elements as we are recommending here.





# Project A: Arts Center

## Project Components

- **Primary program:** Mid-size and small performance and rehearsal spaces
- **Other recommended components:**
  - Non-profit gallery, exhibition, and teaching spaces
  - Digital media arts spaces and programs
  - Healing arts spaces and programs

## Potential Users:

- Schools & universities
- Local community groups
- Touring groups





# Project A: Arts Center

## Responsiveness to Assessment – Key Points

- Large and well-educated market area suggesting propensity to attend arts and entertainment events
- Significant demand for spaces on the part of local and regional artists and arts organizations
- Lack of high quality existing facilities for performance, rehearsal and nonprofit exhibition
- Interest of potential partners like Lone Star College
- Additional components attract a broad diversity of the community to the project

# Project B: Natural Science Museum

## Project Components

- **Primary program:** Exhibit, public, admin, and storage space as a satellite location for the Houston Museum of Nature and Science or a similar partner.
- **Other recommended components:** Flexible event space for public and private events



# Project B: Natural Science Museum

## Responsiveness to Assessment – Key Points

- Large, growing family population now traveling to other communities for cultural programming.
- Lack of museum facilities and programs.
- Lack of high-quality event space, with availability, not attached to hotels or churches.
- Presence of willing partners to advance the concept.