



Nevins Hall Market & Feasibility Study

October 2009

executive summary

The Town of Framingham and the Framingham Downtown Renaissance are exploring if and how the presently underutilized Nevins Hall might be renovated and animated in order to better serve the community and contribute to downtown revitalization.

To that end, Webb Management Services has been asked to conduct a feasibility and market study on the potential renovation of Nevins Hall. The brief for the assignment was clear: Does the market suggest programming opportunities that could better activate the historic Nevins Hall? This report examines the potential for an improved Nevins Hall in terms of four key issues:

1. The characteristics of the market and potential audiences.
2. The inventory of similar facilities that serve the region, as well as relevant spaces that accommodate special events, local arts groups and community-oriented programs.
3. Demand on the part of potential users.
4. The benefits and impacts that a more active Nevins Hall would have on the community.

We then offer conclusions, facility recommendations, operating recommendations, a pro-forma operating budget for seven years of operations, and an estimate of the economic impact that a renovated Nevins Hall might have on Framingham.

Audience and Market Analysis

The first step in this process was to define a market for a renovated Nevins Hall. This market definition was informed by community and client input as well as our own experience defining market areas for cultural facilities. Primary, secondary and tertiary market areas were defined as follows:

1. Town of Framingham
2. MetroWest Region as defined by the MetroWest Chamber of Commerce, with the addition of Marlborough, based on community and client input
3. The 25-mile radius surrounding Nevins Hall

Framingham's most unique market characteristic is its diversity—a trait that it is known for throughout the Boston region. This diversity not only exists in terms of race and background but also in terms of income levels and status. Overall, the propensity (likelihood) for Framingham and the MetroWest region to support additional arts and entertainment offerings at Nevins Hall is good for affordable, traditional and culturally-specific programming. Offerings should specifically target and serve many segments of the community, as some are more likely to respond to affordable, populist (non-elitist), culturally-specific programming, while others will be drawn to more exclusive and traditional presentations. Key audience segments include families, empty-nesters and retirees, and culturally-specific populations, particularly the large Brazilian population.

Existing Facilities

A review of other facilities included large-scale regional venues with 950-seats or more, local performance facilities and meeting/banquet spaces. Each inventory considers the physical features and types of activity hosted within each space in an effort to identify any gaps and/or opportunities in the market. These research found:

- 26 large-scale regional venues in the regional market, 20 of which have capacities between 1,000 and 3,000. While Nevins Hall is the largest between Worcester and Boston, most of the other regional venues are in better condition, operating consistently and successfully as Broadway, concert venues or university venues.
- 37 local performance venues, more than 65% of which are located at schools, churches or libraries; only four have seating capacity over 1,000.
- 25 meeting and banquet spaces in Framingham and neighboring communities. Most of are located in hotels, places of worship or libraries. Of this inventory, Nevins Hall has great advantage due to its affordability, size and flexibility/flat floor.

This research indicates following gaps and opportunities:

- There is a lack of large-scale, well-equipped performance space in Framingham.
- Regional performing arts facilities are better equipped and staffed than local facilities.
- Nevins Hall has potential complement downtown venues.
- Hotels dominate the banquet/meeting market and there is a lack of alternative, affordable large-scale spaces for events.

Uses & Users

Also critical to the study is understanding demand on the part of uses and users. To that end, a number of potential users and local residents were interviewed in-person or via phone to gauge demand for facilities and programs. These conversations indicated that there is great potential to further augment a notable cultural community but there is also need for more infrastructure and support, as there are limited arts service programs and a large proportion of local funding dollars are said to be directed to Boston cultural organizations.

There is some demand for performance space on the part of local users. Interviewees specifically indicated demand for:

- 12 annual uses for 250 to 400-seat performance space.
- 4 annual uses for a 600 to 900-seat venue.
- 32 annual uses for a large-scale, well-equipped facility for live presentation on the part of local producers, promoters and presenters as well as community organizations like the Library and Framingham State College.
- 15 uses for a large-scale, well-equipped special event space.

This does not include community events (elections, Town Meeting and others) that do not generate revenue but will continue to take place in the Hall and take precedence in its scheduling.

There may also be an opportunity for Nevins Hall to accommodate some touring artists and productions, specifically presentations that target the Town's diverse population segments. This effort should build on the success of events like the summer concert series at Village Green with performances that target families, Hispanic/Latino, Brazilian and other key population segments. Large scale touring presentations (like Broadway) will be a challenging and expensive proposition, given the physical and organizational infrastructure that will be required to facilitate this activity.

Benefits & Impacts

Framingham is working to establish identity within the MetroWest region and larger metropolitan area. Community priorities tend to focus on economic development, downtown development, related land use issues and enhancement of quality of life. These priorities are evident in a number of Town initiatives and plans. More specifically, the Framingham Downtown Renaissance is committed to downtown economic development, having commissioned two recent studies that detail priorities and visioning for downtown Framingham.

A renovated Nevins Hall certainly has potential to support the revitalization and development of downtown Framingham and the surrounding areas by serving as an important economic driver. National research on the economic impact of the arts, as well as stories of comparable venues, support this conclusion.

Conclusions & Facility Recommendations

There is a case for Nevins Hall to be improved based on the following:

- The Hall would be more frequently used today given basic physical and operational improvements.
- Local and regional populations are likely to respond to community-based, culturally-specific and hands-on programming that also includes social engagement opportunities.
- There is a gap in the local facility inventory for a well-equipped, large-scale venue.
- If Nevins Hall is renovated, there are opportunities to animate the space with community meetings and events, presenting programs (including film), banquets and special events, and some rentals on the part of the local and regional arts groups.
- Nevins Hall can play a positive role in Framingham's downtown revitalization efforts and contribute to regional economic development strategies and growth.

From our perspective then, Nevins Hall should be improved to better accommodate demand and to more effectively serve the Framingham community. There are three choices as to the level of investment that the Town might choose to make within the facility moving forward. These options are not mutually exclusive and can be implemented incrementally.

- 1. Basic improvements that build on recent updates to further improve access, technical systems, and amenities.** These include proper restroom access for

audiences, dressing rooms and backstage accommodation, storage space, HVAC, catering kitchen, separate entrance and acoustical treatment. These improvements are required to make the room more active, allowing it to better accommodate a variety of uses and users. However, it is important to note that increased utilization is dependent on effective management and operations along with clear policies and procedures.

2. **Further interior conversion that addresses capacity and flexibility, allowing the venue to accommodate audiences of varying sizes, if possible.** Any treatment would require careful physical planning by a skilled theater designer and should retain as much of the character of the room as possible, as well as the flat floor configuration.

3. **Expand the stage and stage house to better accommodate and attract touring presentations and large regional arts groups.** This would require basic improvements but would also include the construction of a new stage house, interior renovation and significant acoustical isolation. This option is only viable if the Town is willing to spend a significant amount of money to aggressively compete for touring artists, renovate the Hall to the degree necessary to accommodate those artists and invest in infrastructure necessary to support the operation of the space as a roadhouse.

Operating Recommendations & Impacts

The Town should continue to manage Nevins Hall, as the Hall is centered in Framingham’s municipal center. A part-time Theatre Manager who is dedicated to the venue should be hired to oversee the Hall. As the venue is improved, additional staff will be needed to support programming initiatives. Further into the future, we would suggest that a Town department or entity be established to program and manage the Hall and all Town-sponsored arts, culture and community events. The Department would set and implement Town cultural policy and provide service and counsel to local organizations.

Assuming that renovations take place to the second recommended level of investment, a pro-forma was developed to suggest how the Hall might perform through and after renovation. The key step in developing the pro-forma was estimating activity. While the resulting program of events is not an exact forecast of activity, it does provide a basis for projecting earned revenues, expenses and attendance.

Following is a summary of financial performance detailed within the pro-forma.

Fiscal Year	2009	2010	2011	2012	2013	2014	2015
Attendance	12,704	15,176	17,648	29,280	33,792	57,456	64,224
Earned Income	\$138,475	\$181,470	\$237,467	\$360,280	\$442,926	\$733,348	\$871,328
Operating Expenses	\$176,949	\$218,115	\$363,345	\$717,441	\$813,919	\$1,061,719	\$1,252,920
Funding Requirement	\$67,500	\$93,000	\$161,000	\$429,000	\$453,200	\$478,048	\$503,570
Earned Income as % Op Exp	78%	83%	65%	50%	54%	69%	70%

The fundamental approach is to build activity slowly, which allows for reduced operating expenses to go with smaller earned income in the first years. Annual funding requirements grow over time. By the last year, earned income once again covers nearly 70% of significantly expanded operations.

Finally, these operating projections along with an assumed capital investment of \$5,000,000 suggest that Nevins Hall can have significant quantitative and qualitative economic impact on downtown Framingham and Middlesex County.