Developing a vision:

Analysis of cultural planning in six peer regions and recommendations for Greater Milwaukee

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About The Public Policy Forum

Milwaukee-based Public Policy Forum – which was established in 1913 as a local government watchdog – is a nonpartisan, nonprofit organization dedicated to enhancing the effectiveness of government and the development of southeastern Wisconsin through objective research of regional public policy issues.

Preface and Acknowledgments

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Introduction and methodology

In recent years, civic and elected leaders concerned about the condition of Greater Milwaukee's major cultural and entertainment assets have laid considerable groundwork for action. Comprehensive research has been commissioned to assess the condition of those assets, quantify gaps in public funding, identify potential public funding models from other metro areas, and assess the capacity of private philanthropy to play a role in supporting the region's cultural assets and programs. In addition, a task force of prominent civic and government officials has deliberated over the basic parameters of a potential public funding plan, and business leaders have conferred with their counterparts in other cities on the elements of successful campaigns that have garnered support from the general public.

Yet, despite this initial work, an important gap remains: the lack of an overall, community-wide vision for the metro region's arts and cultural landscape. Indeed, it could be argued that before decisions can be reached (and/or brought to voters) regarding how Metro Milwaukee's cultural assets and organizations should be funded, governed, and maintained, a broader set of questions must be answered regarding how arts and culture fit into the community's larger aspirations; and the types and breadth of amenities and cultural opportunities that citizens desire and for which they are willing to pay.

In other metro areas across the country, such issues have been addressed with comprehensive planning processes that have shaped a cultural vision for their regions. Consequently, at the request of local private funders, the Public Policy Forum has undertaken research that is designed to inform Greater Milwaukee's civic leaders about the strategies other regions have employed to conduct cultural planning/visioning efforts, and to identify a possible path for proceeding with such an effort in Milwaukee if such an approach is pursued.

We conducted a national scan, identifying about 20 comparable metro areas that have recently completed a cultural planning process. From that list, we chose plans from six communities to explore in depth:

- Northeast Ohio (2000): Northeast Ohio's Arts & Cultural Plan
- San Diego (2006): pARTicipate San Diego: The Case for Increased Patronage for Arts and Culture in the San Diego Region
- Oklahoma City (2009): Strategies for Tomorrow: A Cultural Plan for Oklahoma City
- Kansas City (2013): KCMO Arts Convergence: Becoming a 21st Century Cultural Center
- Kansas City/Region (2015): ONEARTSKC: Regional Cultural Plan
- Minneapolis (2016): The Minneapolis Creative City Road Map: A 10-year Strategic Plan for Arts, Culture and the Creative Economy

Our analysis is based on a review of each community's final published plan documents, as well as phone interviews with individuals who were closely involved in the creation of the plans. The six plans were selected based on our desire to capture insights from specific contexts that we felt were relevant to decision-making by Metro Milwaukee civic leaders. Specifically, these six plans allowed us to explore the following:

- The characteristics of plans with different types of sponsoring organizations. Of the six plans we analyzed, three were led by municipalities (Minneapolis, Kansas City, Oklahoma City); one by a community foundation (San Diego); one by a regional arts council (Kansas City

Region); and one by a regional partnership formed specifically to develop the plan (Northeast Ohio).

- How cultural planning took shape in two metro areas whose models of dedicated public funding for arts and culture the Forum studied in previous research (Northeast Ohio and Oklahoma City).
- Plans that have been in place long enough to meaningfully assess their results and impact (Northeast Ohio, San Diego, Oklahoma City).
- Plans from metro areas considered to be Greater Milwaukee's regional peers (Minneapolis, Northeast Ohio, Kansas City).

Our analysis begins with a general overview of the purpose and process of cultural planning. Next, we analyze six key aspects of the cultural planning process as they relate to the six benchmark cultural plans we studied: impetus, primary objectives, scope, governance, stakeholder engagement, and results. We then present key decision points Milwaukee's civic leaders will need to reconcile in considering whether and how to undertake a cultural planning process. The report concludes with a set of practical recommendations that take into account both Milwaukee's cultural and political landscape and the insights we draw from our analysis of the six benchmark cultural plans.

Cultural planning: A brief primer

What is a cultural plan?

A cultural plan is a community-developed statement that articulates a community's vision for the future and lays out a plan for achieving it. The purpose of undertaking a cultural planning process is to outline a community's arts and cultural needs and priorities and establish a roadmap for coordinated, strategic resource investment for addressing them.

Typically, a cultural plan identifies a community's cultural assets and needs, outlines a long-term vision, and articulates action steps to realize the vision. Some cultural plans include suggested recommendations, timelines, and estimated costs that pertain to specific organizations or community partners. However, in general, a cultural plan is not binding. Rather, effective plans are designed to adapt to changes in the local cultural, political, social, and/or economic landscape, providing direction and concrete suggestions for action for interested parties.

Elements of a well-constructed community cultural vision/plan and process

Each community structures its planning process in its own way. Nevertheless, most effective plans reflect at least some of the following process elements:

- Alignment with broader community planning, such as municipal comprehensive plans
- Active support from key community leadership (i.e., led by a credible, accountable, and respected steering committee and co-chairs)
- Transparent community stakeholder engagement throughout the process, especially as it relates to engaging arts and cultural organizations to articulate *their* vision and soliciting information and feedback from them.
- Definition of what is meant by arts and culture from the community's perspective, including articulating the organizations, activities, and individuals that are considered to be under the arts and culture umbrella (e.g., cultural institutions, parks/recreation, historical preservation, independent artists, creative businesses, etc.)
- Definition of geographic scope (e.g., city, county, region, other?)
- Success metrics defined at the beginning of the process

Once the process is complete, the community's work is encapsulated into a published document that typically includes:

1. Messages to the community from key sponsoring community figures (elected and civic leaders)
2. Background, context, and history related to the community's cultural sector
3. Assessment of the state of the arts and culture sector: needs, assets, opportunities, challenges, aspirations
4. A strategic vision
5. Key goals, priorities, and action steps
6. Implementation and evaluation planning

ANALYSIS OF BENCHMARK CULTURAL PLANS

OVERVIEW OF PLANS

Table 1 presents an overview of some of the key elements of the six cultural plans reviewed for this analysis. As shown, the six plans encompass an array of variables that will be instructive for leaders who are considering a cultural planning process for Metro Milwaukee, including the type of entity driving the process; the timeframe covering both the planning process and plan implementation; the budget for producing the plan; and the funding mix. Below, we provide additional basic information about the nature of each plan.

Table 1: Cultural plans in six peer regions: Key elements

Region	Geographic scope	General timeframe	Time to develop	Budget (for external consultants)	Plan owner & developer	Funders
Northeast Ohio (Cleveland Area)	7-county region	2000-2005	3 years	$1.4M	Community Partnership for Arts and Culture	7 private foundations and corporations
San Diego	City	2006-2009	8 months	$75K	San Diego Foundation	San Diego Foundation plus 2 others
Oklahoma City	City	2009-2014	12 months	$50K	City: Charged Cultural Development Corporation of Central Oklahoma (nonprofit) to develop plan	Oklahoma City
Kansas City	City	2013-2021	18 months	$100K	City: Charged Mayor's Task Force for the Arts to develop plan	City (40%) plus private, corporate, individual
Kansas City Region	5-county region (2 in KS, 3 in MO)	2015-?	12 months+	$125K	ArtsKC: Regional arts council	ArtsKC, counties, NEA, MO Arts Council, local foundations
Minneapolis	City	2016-2016	18 months	n/a (City staff and volunteers developed plan)	City: Office of Arts, Culture and the Creative Economy	City of Minneapolis

IMPETUS

Apart from the stated objectives in each published plan, the decision to undertake a resource-intensive cultural planning process in each metro area we reviewed reflected a specific determination that the arts and culture sector was not simply a luxury, but was essential to the region's social and economic vitality.

This recognition took a distinct form in each region, but the common impetus was a belief that the status quo in the cultural sector was no longer sustainable or sufficient to sustain the future envisioned by stakeholders. For example:

- In Northeast Ohio, consensus took shape around the need to expand public sector support for arts and culture to complement a robust private funding base.
- San Diego saw increasing "arts patronage" in both the public and private sectors as essential.
- In Oklahoma City, a series of economic impact studies and a voter-approved sales tax to develop downtown civic amenities (MAPS) spotlighted arts and culture as tied to the long-term sustainability of the region's creative economy.
- The Kansas City region hoped a unified vision would *both* revitalize efforts to establish a community mandate for dedicated public funding for cultural assets *and* leverage existing assets to enhance quality of life.

Motivations also extended beyond financial concerns. In Minneapolis, City government saw a role for itself in rescuing a languishing 10-year cultural plan adopted in 2005 that was stymied by lack of coordination of arts and culture activity. The City also saw an opportunity to set a course for the next 10 years where arts and culture would be structurally integrated within the City's comprehensive planning process.

Like Minneapolis, Kansas City's city government also sought to define a role for itself in advancing cultural development – but from a position of relative strength – as a way to build on a confluence of cultural activity, from a rise in employment of individual artists and neighborhood creative placemaking, to a new city ordinance to fund public art, to the establishment of a regional united arts fund.

Primary objectives

Although the plans are intended to be shared visions of the community as a whole, it should be noted that each plan's stated objectives reflect the specific interests and constituencies of the principal entity driving the process, be it a city government, a private foundation, or a cultural nonprofit. To varying degrees, however, the primary objectives of the cultural plans we analyzed fall into one of two overarching categories:

1. **Craft a unified direction for disparate community efforts related to arts and culture.** The predominant impulse for initiating a cultural plan is a common perception of a need to promote coordinated strategies and investments around arts and culture. The means of securing enhanced coordination vary from city to city, and include efforts to ensure that public and private funders invest resources according to common goals, attempts to structurally link cultural planning efforts to official city government planning processes, and efforts to use K-12 education policymaking as a means of promoting cultural literacy or the future creative economy. Most plans use terms like vision, blueprint, and roadmap to describe their overall intent. In fact, to hedge against inevitable shifts in the economic, political, and organizational landscape, several of the plans emphasize creation of a broad vision, as opposed to a prescriptive plan. Nevertheless, all six plans in this analysis include varying levels of detailed lists, including some combination of goals, objectives, strategies, action steps, recommendations, timeframes, cost estimates, and responsible entities. Again, the level of specificity tends to be linked to the type of organization sponsoring the plan

process (e.g., Kansas City's city-sponsored plan is one of the most prescriptive, though not binding, especially with respect to its own role in implementing the plan).

2. **Make the case for financial and/or political support of arts and culture.** This objective can take form as building awareness of the intrinsic value of arts and culture; raising visibility and better leveraging of existing local arts and cultural offerings and the resources to support them; identifying needs and priorities for improvement in the cultural sector; and providing evidence of how arts and culture has benefited economic development, tourism, education, social cohesion, and quality of life. The intended audience also varies, ranging from the general electorate and specific local or state policymakers to funders and the business community.

Scope

The scope of investigation in each plan takes shape primarily from the geography served by the conveners, their primary objectives (discussed above), and the way they choose to define arts and culture. In the six plans we reviewed, arts and culture is broadly defined. Not surprisingly, in both regional plans (Northeast Ohio and Kansas City region), the conveners chose not to prescribe a definition of arts and culture, preferring instead to have the multi-county stakeholders informing the process define it for themselves. But for those that did seek to define, arts and culture generally includes nonprofit arts and cultural organizations and facilities in the areas of visual and performing arts. In many cases, it also includes public art and beautification, media and digital arts, literary arts, architectural design, and historical preservation. Some plans reflected even greater specificity, including areas such as crafts; cultural festivals; the work of individual independent artists; commercial art and other creative businesses; creative placemaking; arts education; and even audiences, patrons, and individuals pursuing personal creative interests.

Having laid the foundation of the plan by establishing geography, primary objectives, and a definition of arts and culture, most planning processes further refined scope through targeted data gathering involving **research** and/or a **community engagement** process. In fact, most plans include some combination of **research and analysis** of the following topics:

- Benchmarking against comparable communities in terms of the types and magnitude of funding streams into the cultural sector.
- Economic impact analyses attempting to assess the cultural sector's contribution to the regional economy.
- Inventory and assessment of the conditions of arts and cultural facilities, programs, and other offerings.
- Investigation of trends in audience and patron attendance patterns.
- Studies on the creative workforce, their needs, and available resources.

Community engagement typically denotes a process to elicit the perceptions and ideas of specific stakeholder groups through surveys, interviews, and community forums. We discuss the process itself in further detail below. Among the plans reviewed for this analysis, the most common areas of stakeholder inquiry shaping the overall plan scope are as follows:

- Visions and aspirations for the future of the community overall and/or for its cultural sector in particular.

- High-priority problems, needs, or barriers facing the cultural sector and opportunities for improvement.
- What people value about the community and what they think makes it distinctive or unique.
- Arts and cultural offerings in which stakeholders participate; offerings in which they would prefer to participate but face barriers to doing so; identification of those barriers.
- Views on the desired role for key institutions such as city or county government, school districts, community foundations or other large private funders, etc.

GOVERNANCE

To understand the governance structure behind these plans and the roles of major public- and private-sector actors, it is useful to distinguish between the following three distinct governance components: convening, priority setting, and implementation/administration.

Convening

The entity that spearheads the cultural plan in each community assumes a number of roles. The first and most influential of those is that, as convener/owner, that actor chooses a relatively small group of high-level civic leaders (in most cases as a steering committee) who drive the plan's content and process. The convener/owner also tends to be the sole or principal funder of the plan; as such, that actor usually selects and directs one or more consultants to help shape and produce the plan. Although the final plans generally give credit to all actors who contributed to the plan's creation, the plan ultimately is published under the name of the organization that acted as spearhead or convener.

In Oklahoma City, Kansas City, and Minneapolis, city government served as the plan convener. Oklahoma City tapped a nonprofit called the Cultural Development Corporation of Central Oklahoma to develop a five-year cultural plan and be directly accountable to the City Council. The City of Minneapolis' Office of Arts, Culture and the Creative Economy organized a high-level steering committee and a larger working group, while the Kansas City mayor appointed the Mayor's Task Force for the Arts to oversee a similar steering committee.

By contrast, the convening organizations for the cultural plans in the remaining three communities each took distinct shapes. In the Northeast Ohio region, a major private local foundation, a community foundation, and the Cleveland Cultural Coalition formed the Community Partnership for Arts and Culture (CPAC) expressly to develop a strategic cultural plan. The CPAC then became the owner, convener, and driver of the plan. The Kansas City Regional plan was convened, funded, and managed by ArtsKC, a regional arts council, in partnership with other arts and cultural agencies (but notably **not** with the city-convened Kansas City plan). Finally, the San Diego cultural plan was convened and managed by the San Diego Foundation, which is the area's major community foundation.

Priority setting

The convening entity typically names a steering committee to oversee the second layer of governance – priority setting. This can include refining the scope of the plan and deciding how and to what extent to incorporate wider community stakeholder input as part of the plan.

Table 2: Cultural plans in six peer regions: Steering committee makeup

	Northeast Ohio	San Diego	Oklahoma City	Kansas City	Kansas City Region	Minneapolis
Number of members	30	12	About 27	25	27	32
Number of constituencies represented	13	4	Unknown	11	9	15
Example Constituencies						
Artists, Guilds	4	x				1
Businesses/ Chamber of Commerce	5			4	11	2
Cultural Center, Arts/Cultural Advocacy, Associations	2			2	1	1
Arts/Cultural Institution	6	x		4		1
School District/School				1	3	1
City and County Government	7			6	4	15
Private/Community Foundation	3	x		1	1	1
Tourism & Convention	1			1		1
Arts Councils & Commissions (City/State)	1			2		4
Specific Cultural Community (e.g. Native American)					1	1
Downtown Development				1		1
Neighborhood & Community Development	2			1	1	6
Parks and Recreation				1		1
Higher Education	2				4	1
Other	3	X			1	1

As shown in **Table 2**, even within our small sample of plans, the size and makeup of the priority-setting bodies vary widely. Most steering committees include some mix of arts/cultural sector actors, local government, corporations, civic leaders, and private funders. The two largest (and most inclusive) steering committees – those appointed in Minneapolis and Northeast Ohio – each involved about 30 members representing a wide range of public and private stakeholders, including arts and cultural institutions, elected officials and staff from city and county government, school district leaders, private funders, neighborhood/community development agencies, higher education, parks and recreation, convention and tourism entities, the creative/business sector, individual artists, and others.

Steering committees were somewhat more limited in San Diego, Kansas City, and Kansas City region. For those plans, steering committees included fewer stakeholder groups, and members were more explicitly selected based on their civic influence or ties to funding, as opposed to their roles in the arts and culture sector.

On the other extreme is Oklahoma City's plan, which appears to have been a product of a relatively closed planning process principally involving Oklahoma City government and the Cultural Development Corporation of Central Oklahoma, whose Board of Directors served as the plan's steering committee. Notably, the cultural community, arts commissioners, and Oklahoma City's united arts fund (Allied Arts) were not direct participants in developing Oklahoma City's cultural plan (though Allied Arts did become more actively involved during the implementation phase).

Implementation/administration

With regard to the three plans convened by city governments, the finalized plan calls for a relatively explicit implementation scheme and names an entity to oversee implementation of the plan's findings and/or recommendations:

- As part of Oklahoma City's council-approved plan, the City's planning department, with assistance from the Oklahoma Visual Arts Commission, was tasked with implementing the plan for about two years, after which a new Office of Arts and Cultural Affairs was created within the planning department. That office continued implementing the cultural plan, reporting back to the city council regularly.
- The Minneapolis plan was both developed and implemented by the City's Office of Arts, Culture and the Creative Economy, housed within the City Coordinator's Office and with close ties to the City's planning department. Additionally, the Minneapolis Arts Commission will monitor the work of the new city office.
- In Kansas City, the plan called for the creation of the Office of Culture and Creative Services. The director of that office reports directly to the city manager and is charged with overseeing the plan's implementation.

The lines of accountability are hazier for implementation of the plans in Northeast Ohio, Kansas City Region, and San Diego. In Northeast Ohio, the convening entity (the Community Partnership for Arts and Culture) took responsibility for implementation, working closely with all county governments. In fact, as a result of the plan, the Partnership was incorporated as a nonprofit organization and continues to take an active role in policy development to promote arts and culture. Conversely, in San Diego and the Kansas City region, while the conveners (the San Diego Foundation and ArtsKC) charged themselves with implementation, accountability structures in the plan process were weak

enough that shifts in organizational leadership after the plans were finished largely truncated any momentum the plans had generated while they were being created.

Stakeholder engagement process and strategies

Our analysis shows that with the top two governance tiers (the plan owner/convener and the steering committee) guiding the plan's strategic direction, the cultural plan typically takes shape through a series of direct community stakeholder engagement strategies. The goal of stakeholder engagement is to gather input and ideas for framing the wider community's aspirations for itself and for defining the role of arts and culture in that vision.

The structure of the community engagement component directly reflects the relative interest on the part of plan conveners/owners to have various constituencies involved in visioning and/or plan implementation. Those with more extensive (and expensive) community engagement strategies aim to avoid a top-down approach where a small subset of community interests – such as business, arts, or public sector – holds disproportionate influence over priority setting for the cultural plan. Successful community engagement strategies strike a delicate balance between inclusivity and executive decision-making such that stakeholders feel represented and heard, but the process has enough momentum to *keep* participants motivated and engaged.

With the exception of Oklahoma City, each of the plans in our analysis included extensive and varied community engagement strategies. As illustrated with data in **Table 1** on page 7 and **Table 2** on page 11, the costs and duration of those strategies correlates closely with the breadth and depth of the stakeholders reached. Communities that commit to such time and expense do so with the intent that the cultural plan will reflect and incorporate the diversity of the community in terms of values, vision, culture, race/ethnicity, socioeconomic background, geography, industry, etc.

Table 3 shows the prominent stakeholder engagement strategies (outside of steering committee membership) observed in these six plans. Below, we list those strategies in order of magnitude of direct involvement with the planning process associated with each strategy.

- Invitation to stakeholders to serve on large-scale advisory committees and/or function-specific subcommittees/working groups. Examples include arts education, marketing, and data analysis.
- Individual in-person or telephone interviews with key community figures.
- Online surveys sent out to potential participants; surveys can be targeted to specific constituencies such as arts organizations, artists, audiences, etc.
- Facilitated public or private conversations/forums such as town hall meetings, discussion groups, or focus groups.
- Piggy-backing on existing large-scale arts and cultural events, where attendees could be surveyed briefly or involved in some other brief opportunity to have their thoughts and ideas captured.
- Social media and other web-based engagement strategies where participants self-select to contribute ideas (i.e., special website designed to capture and reflect input from participants).
- Public release of preliminary plan drafts followed by public comment/feedback period.

Table 3: Cultural plans in six peer regions: Community engagement methods

Region	Working groups & committees	Number of Participants Reached					
		Individual interviews	Facilitated forums	Public surveys (online/phone/ in-person)	Interactive website/ social media	Public comment on draft plan	Other
Northeast Ohio (Cleveland Area)	Advisory Council: Open to anyone interested in planning process (400 joined)	200	40+ Forums and Civic Leader Dialogs	7,200 (600 - Public 600 - Artists 6,000 - Audience)			
San Diego	Arts & Culture Working Group: "Knowledge Group"	Yes	Yes	900			
Oklahoma City (None Conducted)							
Kansas City	Four subcommittees: Arts education, Marketing, Governance, Cultural planning	80 (In person)	500 (40 forums)	1,400	1,650	Yes	
Kansas City Region		75 individual and group interviews	315+	1,000	7,100		School district survey on arts education
Minneapolis	Working Group: (Steering Committee plus another 80+ stakeholders); 2 Artist Engagement Teams	Yes	4	Yes	Yes	Yes	Large-scale convening of creative orgs (100 participants from 70 orgs)

Typically, the direct community stakeholder engagement process dramatically expands the breadth of constituencies represented in the plan process and content. Common stakeholder groups solicited to contribute to this process include:

- Elected officials
- Local residents and workers
- Arts and culture institutions staff and board
- Individual artists
- Civic and philanthropic leaders
- Local businesses both inside and external to what is considered "creative businesses"
- Professional and volunteer leadership of local arts organizations
- Arts educators
- Neighborhood and community development leaders
- Economic development and convention/tourism/visitors officials
- Other community organizations/nonprofits

Results

If these six cultural plan case studies are to be instructive for Milwaukee, then additional information is required regarding plan results. For example, to what extent were plan recommendations implemented? Did the community galvanize and leverage resources and energy around a common purpose established by the plan? What other outcomes were achieved as a result of the planning process? What were the unintended negative consequences of the effort, if any?

We approach these questions first by reviewing the structure of each plan's final recommendations; and then by exploring the longer-term policy, programmatic, fiscal, and other outcomes of the plan.

Plan structure

The structure and basic direction of each plan's final goals and recommendations offer insight into the nature of a final product that would result from a cultural planning process in Metro Milwaukee. As noted earlier, most of the plans we analyzed do not articulate a single, broad, cross-sector vision around which the community could rally. Instead, each of the six lays out four to 10 goals with relatively detailed related strategies and action steps to address specific functions and dimensions of the cultural sector. **Table 4** summarizes the plan structures across the six communities.

Oklahoma City proceeded carefully, electing to implement its five strategies one at a time, and bringing in an external implementation partner (either a nonprofit or consultant) for each one. Notably, Oklahoma City began with "Energize the Atmosphere," which essentially focused on the core of the cultural community by bolstering support for artists and their professional development.

In Kansas City and Minneapolis, the plans link directly to the needs and opportunities identified in the community input process. City government, as the convener and owner of the plans in both cases, delivers on its intent to design and assume a role for itself with respect to arts and culture. Both cities used newly created or newly structured city offices devoted to arts and culture, structurally integrated with other city development functions, and committed to serving as the launching pad for all other cultural plan strategies.

Table 4: Cultural plans in six peer regions: Plan structures

Region	Plan structure
Northeast Ohio (Cleveland Area)	**4 Goals: Includes objectives, strategies, timeframes, estimated costs, partners** 1) Access Effectively connect the region's people to arts and culture (2 objectives) 2) Learning: Establish lifelong arts and cultural education (3 objectives) 3) Partnership: Make arts/culture partner in neighborhood/community/regional devel. (3 objectives) 4) Resources: Develop financial/other resources to sustain/grow arts/cultural sector (4 objectives)
San Diego	**5 Recommendations: Includes next steps (to be led by San Diego Foundation)** 1) Public awareness and advocacy 2) Arts Education 3) Grantmaking to arts/cultural organizations to increase cultural participation, innovation 4) Grantmaking to artists, organizations to fund innovation 5) Donor engagement and cultivation
Oklahoma City	**5 Creative Strategies: Includes suggestions for groundwork, implementation action steps, success measures** 1) Entice, Attract, Entertain: Present Oklahoma City as a cultural destination 2) Maximize what exists: Forge a wider path for collaborating with City and County government 3) Energize the Atmosphere: Appreciate and improve the existing cultural network 4) Amplify lifelong learning: Provide opportunities for arts education across the age spectrum 5) Support and Sustain: Determine all avenues for funding for cultural/arts organizations
Kansas City	**10 Goals: Includes corresponding strategies and their starting points** 1) Enhance leadership and funding 2) Enhance public art program 3) Improve arts education 4) Enhance cultural opportunities in neighborhoods 5) Enhance opportunities for individual artists 6) Develop cultural facilities and spaces for diverse arts activity 7) Showcase new technology platform (google fiber) 8) Create signature arts and cultural festival 9) Increase support for creative economy 10) Provide access to comprehensive information about arts and culture
Kansas City Region	**6 Strategies: Includes detailed implementation plan, costs, partner agencies, action steps** 1) Strengthen arts education 2) Improve regional marketing and promotion 3) Support creative placemaking 4) Strengthen capacity and leadership 5) Support advocacy 6) Support creative economy
Minneapolis	**4 Visions/Goals: Includes detail on next steps, what works, room to grow, priority objectives** 1) Amplify the local: Diverse creative assets are developed, celebrated, and promoted 2) Arts and culture connect people across differences: Art used to foster access/connections 3) Creative workers have resources/opportunities they need to thrive 4) Arts, culture, creativity strengthen community/economic development

The regional plans in Kansas City and Northeast Ohio also lay out detailed goals but, by design, leave the details of specific elements of the implementation to any willing partners who wish to step up and take a leading role. San Diego's plan structure reflects its owner, a single community foundation, and lays out a series of recommendations aimed chiefly at itself in a self- assigned role as regional convener.

Plan outcomes/effectiveness

For Milwaukee's civic leaders, more illuminating than the plans' structures is the extent to which they were implemented, and whether they succeeded in unifying disparate actors toward a common sense of purpose with respect to cultural life in the community. Here, it is useful to view the outcomes of each plan through the lens of the initial impetus (as described previously) that inspired these communities to undertake a cultural planning process.

Northeast Ohio

Impetus*:* Foster cultural sustainability by expanding public sector support for arts and culture to complement a robust private funding base.

Outcomes

Of the seven counties encompassed in the Northeast Ohio cultural plan, Cuyahoga County (where Cleveland is located) experienced the most direct impact from the cultural planning process, especially in terms of a boost in arts and culture-related public policy development. As a result of the regional cultural plan, arts and culture strategies are now more integrated into City and County planning efforts. Although it took an additional six years, Cuyahoga County also successfully established a new dedicated funding stream when voters resoundingly approved a referendum to institute a cigarette tax to support arts and cultural organizations. In addition, the City of Cleveland advanced other related policy such as a One Percent for Art ordinance, which directs the city to appropriate one percent of funding for new municipal construction to public art projects. These policy triumphs helped create accountability in the public sector for sustaining investments in arts and culture to a degree not observable prior to the plan's creation. And the plan's owner/convener, the Community Partnership for Arts and Culture, continues to be a political force as a prominent vocal advocate for policy development that supports arts and culture throughout the region.

Oklahoma City

Impetus**:** Support long-term sustainability of the creative economy by supporting arts and culture

Outcomes

As discussed above, one of the first cultural plan items that Oklahoma City chose to implement focused on supporting individual artists as a way to develop the region's future creative economy. In addition, according to those involved with crafting the plan, arts and culture historically were not prominent elements of the City's routine five-year comprehensive planning processes. However, since the creation of the plan and its establishment of the City Office of Arts and Cultural Affairs (housed within the City planning department), arts and culture now are considered central and structurally linked to the City's larger planning efforts. Other outcomes that appear to be related to the cultural plan include a One Percent for Art ordinance (though its implementation has hit some obstacles), a new City-funded position devoted to public art, and a nascent cultural district program.

San Diego

Impetus**:** Increase cultural patronage in both the public and private sectors to become a nationally competitive arts and culture center.

Outcomes

The San Diego Foundation followed through on some of the plan's recommendations by creating and refining its competitive grant process to better support local arts and culture assets. Some who were involved on the Working Group – such as the director of the San Diego City Commission for Arts and Culture – acted as ambassadors for the plan by plugging wider city government planning efforts (such as City Comprehensive Plans) in which they were involved into the cultural plan's recommendations. Some believe the plan results fostered more dialogue with city tourism, the business community, and potential donors. However, in part because the Foundation shifted focus following a change in leadership, it is no longer providing substantial guidance on implementation of the plan's policy or practice recommendations.

Minneapolis

Impetus*:* Create new leadership in City government that integrates arts and culture throughout all city government planning efforts (i.e., activities undertaken by the City government planning department).

Outcomes

It is too early to assess the effectiveness of the Minneapolis plan, as it only recently has been implemented. However, the plan is designed to be adaptive, and it bodes well that a high-level office within City government – structurally linked to wider City government planning processes and with a City planner at its helm – is tasked with the plan's implementation and stewardship. Full implementation will hinge on a wider collective effort involving actors external to City government in the nonprofit, business, and philanthropic communities. The plan's power to unify these stakeholders remains to be seen.

Kansas City

Impetus: Build on the confluence of recent cultural activity to define a role for City government in advancing cultural development.

Outcomes

In response to one of the plan's primary recommendations, the City created the Office of Culture and Creative Services and a new director position who reports to the City manager. This has successfully integrated arts and culture priorities into City comprehensive plans, as evidenced by the City's adoption of three of the five cultural plan goals into its economic planning priorities (developing arts facilities, enhancing arts and culture opportunities in neighborhoods, and using arts-based strategies to support the creative sector). In addition, an explicit focus of this new office is to implement the cultural plan, in part by seeking out and leveraging City connections with community partners.

Kansas City Region

Impetus: Establish a unified regional vision that can both leverage existing arts and culture assets and establish a community mandate for dedicated public funding.

Outcomes

Although some involved with the plan claim to have observed a renewed interest in public funding following the release of both Kansas City plans, the plan itself has not sustained momentum toward any real action steps. As with San Diego, this chilling effect may stem, in part, from weaknesses in the organizational leadership of the plan owner, ArtsKC (the regional arts council). As the implementation phase commenced, disagreement between the ArtsKC CEO and its governing board on how to prioritize plan recommendations resulted in an implementation slow-down. In addition, the regional plan was not linked to either the Kansas City plan or other major regional municipal planning efforts.

Relevance to Milwaukee

Salient decisions for Milwaukee

With an understanding of the mechanics involved in creating cultural plans in six distinct communities, we can draw insights that will be relevant to Milwaukee leaders who are considering the launch of a similar process. In this section, we discuss the key decision points for Milwaukee's civic leaders who are contemplating action to initiate a cultural planning process.

Would cultural planning be a worthwhile undertaking for Metro Milwaukee?

Our review of cultural planning in other metro areas reinforces the notion that such an effort could benefit Metro Milwaukee in several important ways. First and foremost, it could be a means of better articulating the value of arts and culture and of bringing together important constituencies to formulate strategies and hold one another accountable for realizing that value. A well-constructed plan also could serve to coordinate activities among diverse cultural organizations, and it could facilitate strategic coordination among public and private funders.

Yet, communities like Milwaukee that are considering whether to embark on a cultural planning process also should recognize potential obstacles and challenges. Those include the difficulty inherent in defining geographic scope and "arts and culture;" the resource- and time-intensive nature of the planning effort (7-12 months at minimum, involving one or more third-party consultants, extensive community engagement); and the challenges involved in forming partnerships to convene or steer the planning effort and to assign accountability for implementation.

Who's driving?

Should Greater Milwaukee decide to move forward with a cultural planning process, the question of governance likely will be the single most challenging one for stakeholders to resolve. Although the experiences of the six cultural planning processes we reviewed offer constructive insights, one prominent lesson is that Milwaukee's *current* landscape does not lend itself particularly well to the governance models we see in the benchmark plans. San Diego's community foundation model appears too narrow in both scope and impact; the Greater Milwaukee region does not have an entity analogous to the regional entities that drove the plans in Kansas City region and Northeast Ohio; and the most successful of the models we discuss here hinge on a well-funded, high-level city government structure to spearhead implementation, which Milwaukee does not currently possess.

In light of those realities, Milwaukee may need to invent its own cultural plan governance model. The advantage of such an approach is that it would force a solution that is truly rooted in the local landscape, history, values, needs, and aspirations. Yet, it also would create some challenging questions with which to grapple. For example:

- Can an individual entity be identified that would be neutral enough to be trusted with the process, but influential enough to ensure that a meaningful plan is created and to effectively push for implementation?
- Conversely, should a consortium of entities be identified to collectively act as the cultural plan owner and convener, thereby mitigating the potential controversy that could erupt from anointing a single cultural plan driver? If so, which organizations and civic figures would be

willing to step up to work collectively *and* be acceptable to a critical mass of community stakeholders?

- Whether the owner/convener is a single entity or a consortium, should it be comprised of one or more funders, local government leaders (elected or non-elected), nonprofit (cultural or non-cultural), for-profit, or some combination of these sectors?
- And of course, who will commit the necessary financial resources to support the process?

In the end, although someone needs to "own" the process in the sense of keeping it moving, most of the plans we reviewed emphasize that full implementation calls for sustained, multi-sector *collective* action.

Who will be at the table?

Recent civic development discussions around the Bucks Arena, Grand Avenue Mall, and the capital needs of arts, culture, entertainment, and recreational assets already have generated debates over who should be at the decision-making table when it comes to large-scale community development and investment. The six cultural plans discussed here display varying levels of inclusivity – no two steering committees are alike in terms of composition or the weight afforded to distinct constituencies such as businesses, cultural entities, government, funders, etc.

An especially thorny question is whether to include arts and cultural institutions at the priority-setting level, or engage them more peripherally. Most of the communities we studied include cultural institutions on their cultural plan steering committees. Both their perspective on the community's cultural assets and needs and their commitment to future plan implementation often are considered essential to the planning process.

Some argue, however, that placing arts and cultural institutions at the decision-making table – especially if funding decisions are to be made there – could result in conflicts of interest. Milwaukee could confront answers to these questions head-on or arrive at them indirectly by first engaging in a broad discussion about the scope, as discussed above. In that manner, the effort to define scope would help determine who would be included and at what level of influence over the process.

Roadmap vs. broad vision?

If a cultural planning process is initiated in Metro Milwaukee, should it aim to create a high-level vision that leaves the choice of strategies or tactics to the institutions or entities that align themselves with the vision? Or would it serve the region better to have a true roadmap that clearly spells out specific goals and what plan designers forecast to be the requisite strategies, responsible parties, timelines, and cost estimates to implement the plan? Which of these two approaches (or combination of the two) would galvanize both collective and individual decision-making?

The Minneapolis plan saw merit in the high-level vision approach, pointing out, "the plan must be considered in the ever-changing social, political, and economic environment," thus allowing the community to be adaptive and responsive to environmental changes. In the contentious climate that has characterized discourse on public sector investments in Milwaukee, a broad vision that leaves funding discussions off the table, for example, could help keep the conversation moving forward and in a positive direction.

Another advantage of the vision approach – as opposed to a prescriptive plan – is that specific recommendations could constrain the plan's relevance. Static recommendations made at one point

in time run the risk of becoming obsolete as conditions on the ground change. This could discourage future planning efforts in that civic leaders could become disillusioned with the process and the perceived waste of time, energy, and resources that were tapped to engage in it.

If the planning process were able to produce consensus on vision and agreement that actors in all sectors would make decisions based on that vision, then it would be important to establish mechanisms to guide the ongoing tactical decisions of individual entities in a unified direction, while at the same time providing for a way to adjust the vision, as needed. It is important to note that even when the communities we reviewed set out with the intention of establishing a high-level vision, the plans themselves included considerable detail in terms of action-based strategies and recommendations.

How would a Milwaukee cultural plan define "arts and culture"?

As discussed above in the section on scope, every cultural plan defines its community's cultural sector differently. Although rare, some communities, such as Northeast Ohio, elected not to predetermine a definition for arts and culture, instead leaving it to be defined by participants in the community engagement process. However, for those communities that do see value in establishing a clear definition, the process of doing so can become quite contentious.

As the Culture and Entertainment Needs Task Force convened by the Metropolitan Milwaukee Association of Commerce (MMAC) experienced, even the process of defining arts and culture has the potential to divide, rather than unite the community. It can create winners out of stakeholders that are included in the definition and losers out of those who are excluded. Moreover, as the Forum discussed at length in a 2015 report on philanthropic capacity to support arts and culture in Greater Milwaukee, leaders here also will need to make a collective decision on the appropriate balance between support of the breadth versus the depth of its arts and cultural landscape, however that becomes defined.

Recommendations and conclusion

Using our knowledge of recent high-level deliberations by civic and elected leaders related to the future of Milwaukee's cultural sector, the decisions Milwaukee stakeholders will encounter should they decide to undertake a cultural plan (discussed above), and insights gleaned from reviewing the six benchmark plans, we offer the following recommendations for Milwaukee's civic leaders to consider if they proceed with conversations around potential cultural planning efforts.

1. Form a consortium to lead the cultural planning process

Despite the inefficiencies that sometimes can characterize collective action, a key lesson learned from other communities that have engaged in cultural planning is the need to be transparent and inclusive. For this reason, in this case, an effort to work in small groups behind closed doors in the name of "getting things done" may be counterproductive in the long run.

Through our observation of the mechanics of governance in the benchmark cultural plans, we identify at least six distinct roles that a plan owner typically assumes. A consortium could work to collaboratively drive a Milwaukee-area cultural planning process by dividing up the following roles among some small number of entities with relevant capacity:

- Convener, leader, steward of plan
- Project manager/coordinator charged with plan development and implementation
- Facilitator of functional partnerships between appropriate agencies
- Fiscal agent/conduit for securing funding and other resources
- Ongoing coordinator of community engagement and research (keeping all existing accountable parties on track and the public informed of progress)
- Policy advocate at municipal, regional, and state levels

An added benefit of a consortium is that it fosters accountability to the *community* vision and impedes a perception that a single convener/owner is pursuing its own parochial interests. For example, having a consortium as convener/owner could help Milwaukee avoid a detriment of the Kansas City Region plan, namely arguments between staff and board leadership over the priorities in which to invest and implement first.

The Northeast Ohio model could provide a worthwhile model for Metro Milwaukee. Although the current landscape does not feature an entity like the Community Partnership for Arts and Culture, it is useful to observe that the Partnership, at its inception, was a loose consortium formed by a handful of prominent foundations for the express purpose of leading and launching a cultural plan. Having fulfilled that purpose, it also had a long-term role in helping to sustain efforts to implement the plan itself as well as to support organic efforts to build the capacity of the cultural sector that grew out of the plan.

Recognizing the crucial ongoing role the Partnership could play, those involved in the cultural plan incorporated it as a nonprofit that could flexibly address ongoing needs for longitudinal research, policy advocacy, and support of artists and arts organizations in terms of professional development.

Finally, it is worth noting that the potential success of a consortium approach would be significantly bolstered if Milwaukee could establish the type of robust organizational infrastructure in City or County government that is devoted to cultural development that we observed in Oklahoma City,

Kansas City, and Minneapolis. If that is not viable, then Milwaukee's City and County leaders would need to be integrally involved and vocal in a consortium approach to cultural planning. At the outset, this ideally would include vocal championing of the effort by elected leaders, active involvement by planning/economic development departments, and representation by public arts and culture funding bodies (like Milwaukee Arts Board and CAMPAC).

2. Commit to a transparent, inclusive process that reflects the makeup of Milwaukee

Experiences in other communities indicate that *how* a region conducts its planning process will mirror the way it takes shape. In order to unite a diverse community around a cultural plan, both the public input process and the recommended strategies should reflect the composition of the community. Simply put, a highly effective process, while time- and cost-intensive, is most likely to foster a *sustainable* plan around which the community can unite.

Northeast Ohio presents a relevant model on this point, as well. Spurred by private funders (like Milwaukee), that region entered the planning process with a desire to establish the case for robust public funding for arts and culture. However, they initiated the planning process with a much more expansive, long-term mindset. According to the plan's narrative, plan leaders made a "commitment to a long-term planning process designed by the residents of local communities... extensive community input and exhaustive quantitative research back up every one of the plan's goals, objectives and strategies." This approach paid off, literally, as it is credited as a crucial factor in the eventual voter-approved cigarette tax to support cultural organizations in Cuyahoga County.

The six models we reviewed present ample tactical examples of how to imbue a cultural planning process with inclusion and transparency. Northeast Ohio allowed anyone to convene their own "community leadership dialogue" where they recruited their own participants, and plan organizers provided discussion templates to facilitate compiling and incorporating community input. San Diego learned from experience that it was better to have arts and culture organizations as strategic partners in driving the process rather than as passive information providers. Recognizing artists as the unifying heart of a community's cultural life, Minneapolis incorporated Artist Engagement Teams at the center of their community stakeholder engagement process, particularly as a way to draw out the perspectives of specific "missing" stakeholder voices that often are left at the margins of major community conversations.

Especially pertinent for Milwaukee, Minneapolis' artist-centric approach explicitly addressed racial justice and racial equity in its planning process and qualitative data analysis. In fact, Minneapolis captures the potential of a cultural plan to unite rather than divide in saying "[The plan] articulates where the power of art and cultural activities can connect people across differences of race, income, culture and age to foster deeper and more lasting relationships." Similarly, the Kansas City Regional plan puts special emphasis on the region's current and growing cultural/racial diversity and acknowledges that cultural equity is linked to broader equity issues in education, race, and gender. The plan itself adopts cultural diversity as a core value and theme in its six overarching strategies.

3. Be patient: Commit to the process for the long haul

As demonstrated in our six cultural plan models, the plan itself is only the beginning. Some plans include specific action steps that include more task forces, convenings, studies, and other

groundwork and capacity-building measures. An effective process can take years. Being impatient shortchanges the whole effort.

In particular, taking the time to allow a well-conceived community engagement process to play out could have an instrumental benefit. The community engagement part of the plan is itself a valuable public education opportunity that could foster future support for specific strategies, as well as enhanced patronage at arts/cultural venues. For example, as part of its cultural planning process, the San Diego Foundation conducted a survey that indicated widespread support for a referendum for increased taxes for arts and culture. Planners there suspect the cultural planning process raised awareness and support of arts and culture in the wider community.

4. Design the plan to adapt: A sustainable plan is a flexible plan

As discussed, plans with lasting impact effectively balance actionable strategies with aspirational goal-setting that can adapt to fluid community dynamics and needs, changes in community leadership, shifts in economic conditions, and so on. Echoing similar sentiments expressed with regard to all six plans, Kansas City calls its plan a "living document that we can reference and improve upon in the future." Minneapolis refers to its plan as a "working blueprint" that can apply to any stakeholder regardless of size or sector and can be incorporated into internal organizational strategic planning.

Kansas City's plan is instructive in that it sets both short-term objectives that can be accomplished with existing resources and longer-term ambitious goals that may need new ideas in terms of resources or partnerships. As shown earlier in **Table 4 on page 16,** all six plans establish a relatively small set of goals that address perennial community concerns around cultural development, such as access to cultural offerings, funding, advocacy, economic development, and education. For the most part, the strategies proposed to address the priorities are framed as recommendations that serve as a springboard, as opposed to a long-term prescription or checklist.

5. Don't let the consultant drive

Every plan we reviewed invested in the expertise of one or more cultural planning consultants to help facilitate the planning process. One valuable aspect of using a third-party consultant is the consultant's ability to provide objective external perspective and validation. Nevertheless, the owner/convener and steering committee need to keep their hands on the wheel, balancing the consultant's objective perspective with the community's own vision and needs. One mode of operation that could strike this balance is to employ a community stakeholder as project manager, reporting to the steering committee, working closely with outside consultants throughout the process, and authoring the plan itself.

Next Steps for Greater Milwaukee

Greater Milwaukee stands at a critical juncture of cultural, economic, and social activity that is fueling important conversations about the region's collective aspirations and vision. In confronting similar dynamics, several metro areas, to varying degrees of success, have turned to cultural planning.

As civic leaders in Greater Milwaukee consider whether to follow suit, it is useful to consider two context-specific questions:

1. Is the impetus for planning centered around efforts to convince the Wisconsin Legislature to provide Milwaukee County (and perhaps other counties) the authority to hold a referendum on a dedicated public funding source to support arts and cultural assets? If so, then the timeframe governing such an advocacy effort may have an impact on whether to proceed with cultural planning and what form it should take. Our analysis demonstrates the considerable time and resources intrinsic to a well-constructed cultural plan. Consequently, civic leaders in Greater Milwaukee may wish to ascertain whether such a process can be conducted in time to inform the content of a potential voter referendum, and how that timing would influence decisions on planning structure and scope.

2. Conversely, if stakeholders feel that the community's decision to conduct a cultural plan is not inherently contingent on whether a funding referendum is placed before voters, then a different set of considerations should come into play. Civic leaders may determine that cultural planning is needed and desired, irrespective of the question of dedicated funding, as a means of aligning private and public funders of arts and cultural programs and facilities toward a similar set of goals and intended outcomes. If that is the case, then a lengthier planning process with more extensive community engagement may be in order.

With the critical answers to those questions yet to emerge, this analysis hopefully will be instructive to arts and culture stakeholders and the community at large by outlining a number of distinctive approaches to cultural planning; key decision points for those advancing the cause of cultural planning; and specific recommendations civic leaders could consider should they decide cultural planning is the right path for Metro Milwaukee.