

A Proposal to the
City of Lawrence
Cultural Arts Commission

City-Wide Cultural Planning Services



Victoria Plettner-Saunders
Chief Strategist

4769 Kensington Drive
San Diego, CA 92116
(619) 540-2925

victoria@vpscartographie.com
www.vpscartographie.com

November 21, 2014

City of Lawrence, Kansas
Christina McClelland, Director of Arts and Culture
6 East 6th Street
Lawrence, KS 66044

Dear Christina:

Thank you for extending the opportunity for *v.p.s. cartographie* to present this proposal for consulting services for the Lawrence City-Wide Cultural Plan.

v.p.s. cartographie is a national arts, research and strategy firm based in San Diego. As its Founder and Chief Strategist, I am the primary contact person at the firm and would be the project manager for the cultural planning process. In addition, I have proposed a team that includes David Plettner-Saunders from the Cultural Planning Group and Surale Phillips with Decision Support Partners. We all have authority to commit to the project were it to be awarded to our team.

My background includes a Masters Degree in Arts Administration from the University of Oregon followed by more than twenty years experience in the nonprofit arts and culture sector. My practice, *v.p.s. cartographie*, assists arts organizations, philanthropic foundations, local arts agencies and community initiatives with a range of services including planning, research, assessment, and professional development. As a skilled, yet compassionate strategic thinker and planner I have helped individuals plan their professional careers as well as their creative businesses and organizations chart a course for new cultural programs, services and agency goals.

My consulting practice began in 2005 following a 15-year career as an arts administrator that included management work in small arts and arts education organizations and was capped by a seven-year tenure in multiple positions with the City of San Diego Commission for Arts and Culture. I say multiple positions because I started in community arts, progressed to general program management and in my last years, I was promoted to be the Commission's first financial analyst, managing a multi-million dollar allocations budget and an operating budget of \$600,000. At times I also stepped in to assist with public art program management, arts education efforts and advocacy work. While at the Commission I assisted with the development of a National Endowment for the Arts funded Neighborhood Arts Training Institute, a California Arts Council funded San Diego Arts Education Partnership and the first Emerging Leaders of Arts and Culture leadership training for young professionals. I believe that those varied

experiences coupled with working knowledge of a model arts commission helped pave the way for my strength as a consultant for local arts agencies.

Working with young leadership as well as the next generation of creative entrepreneurs are areas of interest and study. I recently completed a restructuring plan for the Los Angeles Emerging Arts Leaders and assisted the San Diego Rising Arts Leaders with a strategic planning workshop. I will bring this knowledge to the Lawrence project and allow it to inform data gathering and public engagement from these key constituencies, which are often overlooked but critical to planning for the future.

In 2010 I was asked to collaborate with the Arts Extension Service at the University of Massachusetts, Amherst and Americans for the Arts to develop a strategic and community planning training workshop for local and state arts agencies. I co-presented the daylong pilot workshop to LAA's from throughout Connecticut in November 2011.

In 2012, following a two-year "lean start-up" I launched a new project, ArtCareerCafe.com. The Café (as I refer to it) is a fully functional arts management and creative workforce career development website, complete with a national job bank, résumé support services and a developing community for the arts job seeker. It was born from the notion that looking for meaningful work is hard and discouraging, but your job search site doesn't have to be. I continue to seek ways to expand the site's reach, my understanding of social media and the realities of an online community, and support systems for our most valuable organizational asset – our human resources.

An enthusiastic researcher with a curious mind and a writer with a deep interest in arts leadership, I have published several articles on next generation and mid-career arts leadership for *CultureWork*, an electronic publication of the University of Oregon Center for Community Arts and Cultural Policy, and NAMAC, as well as conducted statewide leadership research for The James Irvine Foundation. This summer I was asked to write for and was published by the *GIA Reader* with a case study on the San Diego Youth Symphony and Conservatory's El Sistema-Inspired Community Opus Program. I chaired the Arts Education Council at Americans for the Arts from 2011-2013 and founded the first local arts education advocacy network in San Diego in partnership with the California Alliance for Arts Education.

My experience and interests cover a wide range of areas within the cultural field, which when teamed with my skills as a planner, facilitator and communicator and the skills of my teammates, *v.p.s. cartographie* makes a winning candidate for this project. On a more personal level, working with the creative and intellectually vibrant community in Lawrence would be professionally stimulating. Like my interest in working with small and mid-sized organizations because of their accessibility, I prefer the opportunity to work with a city the size of Lawrence. Great things can happen in small cities and I'd like to be part of the effort to uncover what that means for Lawrence, Kansas.

Most sincerely,
Victoria Plettner-Saunders
Chief Strategist

TABLE OF CONTENTS

NARRATIVE-----	4
Overview-----	4
Approach-----	4
Project Management-----	5
Sub-Consultant Participation-----	6
Lessons Learned-----	7
Project Design-----	8
Project Timeline-----	9
REFERENCES-----	10
EXPERIENCE-----	11
COST PROPOSAL-----	13
RESUMES AND QUALIFICATIONS-----	14
Victoria Plettner-Saunders-----	15
David Plettner-Saunders-----	19
Surale Phillips-----	25

NARRATIVE

Overview

The City of Lawrence, Kansas through its Cultural Arts Commission seeks to develop a city-wide cultural plan with a process that brings the community together to chart a course for Lawrence's creative future. The tangible outcome of this effort will be a "functional and sustainable guiding document." Cultural planning in Lawrence follows on the heels of three significant municipal/cultural milestones: the designation of the Cultural District; the receipt of a coveted \$500,000 ArtPlace grant for public art for the 9th Street Corridor Project; and the hiring of the City's first Director of Arts and Culture.

While the city's population is modest in size, it is recognized nationally as home to major institutions of higher education, popular arts centers and well-respected museums in addition to countless arts organizations, creative entrepreneurs, art students, individual artists, cultural participants and cultural tourists.

It is because of what this list of numerous and varied cultural assets and the city's cultural milestones represent in the life of a creative community, that the City is poised to create its first cultural plan. In addition to providing a means for coordination and connectivity that will position Lawrence for greater cultural achievement, the City has identified four planning objectives:

1. To document Lawrence's unique cultural assets
2. To define cultural priorities
3. To recommend strategies and tools that will support the plan's implementation while enhancing the climate for artists, arts-related businesses, cultural tourism, and strengthening Lawrence's creative economic development
4. To recommend methods for integrating infrastructure and capital improvement projects with the plan's goals overall.

Reviewing the totality of Lawrence's existing cultural community infrastructure, it is clear that there is a wealth of activity in multiple arenas (universities, city-owned facilities, creative entrepreneurs, pro-am artists, historic preservationist etc.). Creating a cohesive picture of what *is*, as well as a plan for what *is possible* can support and direct new leadership, further galvanize an already highly engaged community and create opportunities for future growth. It is for these reasons that *v.p.s. cartographie* is enthusiastic about proposing a planning process to create Lawrence's cultural plan.

Approach

After a review of the documents provided as well those found through additional research, a conversation with City staff and a look at the media coverage of the recent executive search process, it is very clear that Lawrence is a community that is highly educated, highly engaged in its own culture and future, and able to achieve significant outcomes despite the lack of an official "plan" to guide it. With this in mind, the

proposed planning process has a strong focus on community engagement and high interaction with City and Commission staff, Commissioners, Task Group members and stakeholders. This is accomplished, in part, by increasing the time spent “on the ground” and working closely with leadership to be as inclusive of all community members as possible throughout the data-gathering and testing phases, using multiple means for stakeholder input and creating a working culture that encourages frequent interaction with the planning team both on site and off. You will see this increased consultant engagement in both the budget and project details with five site visits in the six-month planning timeline.

Secondly, this approach is predicated on the desire to provide the best in planning expertise within the modest means the planning budget provides. Although a small planning and research firm, *v.p.s. cartographie* has developed a reputation for providing high quality service for the small and mid-sized arts organization.

Cultural planning benefits from teamwork. I’ve assembled a team from professional relationships with David Plettner-Saunders of Cultural Planning Group (CPG) and research consultant Surale Phillips with Decision Support Partners, Inc. Together they add considerable planning power while keeping the budget within the bottom line. Both have outstanding reputations with local arts agencies nationwide for their ability to create highly successful cultural plans and provide excellent community/audience research respectively. I have been on several planning teams with David and provided strategic planning services to a client who worked with Surale on community engagement. There I developed a working relationship with her that exponentially increased the plan’s strength.

Project Management

As lead consultant it will be my responsibility to personally manage this project. Throughout my career I have had considerable project and organizational management experience. As a sole proprietor I personally manage all of my client projects, meeting all deadlines and completing all projects within budget. I make it a practice to seek only those projects to which I can add value for the client and complete successfully within the parameters given.

Budget limitations prevent outsourcing administrative tasks such as organizing stakeholder focus groups, scheduling meetings and coordinating community efforts. These tasks will require assistance from Commission or other City staff and the Task Group. The very nature of the project presumes that local project leadership is essential to the process of identifying key stakeholders for one-on-one interviews and small group meetings as well as others who will best serve the planning needs. One of the positive outcomes that can be achieved with a higher level of Task Group interaction in the planning process is an increased level of commitment to its outcomes as well as a stronger working relationship with the consultants, which can build greater confidence and trust in the team and the final product.

Ways to stay on task and to ensure meeting the tight six-month timeline include reviewing the proposed timeline with staff regularly, making adjustments as needed,

scheduling onsite visits early in the process and establishing (at minimum) weekly planning team calls (staff, consultant(s) and Task Group members as appropriate).

Sub-Consultant Participation

As mentioned, this proposal includes two sub-consultants, David Plettner-Saunders, Managing Partner and co-founder of the Cultural Planning Group and Surale Phillips, a market research and evaluation specialist with her own consulting firm, Decision Support Partners, Inc.

David Plettner-Saunders and his partners at CPG have developed arguably the most established cultural planning practice in the country since CPG's founding in 1998. As an arts consultant for more than 25 years David has specialized in working with the public sector (state and local government), nonprofit arts organizations, and philanthropic foundations. He and his partners have prepared cultural plans for scores of communities, including Washington DC, Sonoma County (CA), San Antonio, Santa Monica (CA), Boulder (CO), Roseville, (CA), Chandler (AZ), Los Alamos (NM), San José, and Kansas City (MO). Other clients include the National Endowment for the Arts, and the California Arts Council through which he provided strategic planning services and technical assistance to small rural local arts agencies throughout the state. His cultural and strategic planning work has involved long-standing as well as nascent local arts agencies of all sizes and often led to the identification and creation of new funding sources for the arts.

David was selected for this project for his expertise as a seasoned cultural planner, his political acumen and his strength as a facilitator of community processes large and small. His role will be to co-facilitate the Town Hall during the second site visit and to bring his creativity and experience to the project as appropriate throughout the six-month period. He has agreed to wave his fees as a co-facilitator, enabling us to provide the best in professional services within the project budget.

Surale Phillips has conducted research to help more than 100 non-profit organizations and for-profit companies primarily in the cultural and creative sectors. She is a recognized expert in the field of cultural planning for her skills in community and market research, survey development and analysis, focus group facilitation and more. A few of her cultural planning clients include: Arts Alliance of Jackson and Hinds County (MS); Bradenton Downtown Development Corporation (FL); City of El Paso; City of Roseville (CA); CNY Arts (formerly, the Cultural Council of Central New York); Fresno Arts Council (CA); and Salina Arts & Humanities Commission (KS).

Surale will work with us on the community survey; assisting with developing questions, programming the survey, and analyzing the results. She will create a topline report with charts and key findings that can be included as an addendum to the plan. This survey can also include a means for inventorying cultural experiences and locations to provide additional data for the cultural asset inventory.

Lessons Learned

Of course there are always lessons learned with each planning process. Some of the elements built into this plan are the result of lessons learned. For example, meeting as early as possible on site with staff and the Task Group to learn more about the community, the client and the project needs. This was not built into one of our previous projects in order to save travel dollars. Yet, it was added after contracting when it was apparent that we couldn't launch our process effectively without being in the same place at the same time to gather data that informed future onsite efforts. Five site visits are included with this plan with one immediately after the contract is completed.

Another lesson learned is in fully utilizing a steering committee or task force to help balance the potential outside impression of a staff or consultant driven plan and to better ensure leadership and commitment to its outcomes. An executive director on a project opted out of using a steering committee because of personality clashes between several board members. It felt odd planning without their input and ultimately, one board member held up the process because he was not included in the planning efforts. It resolved well but much of the anxiety could have been avoided by using a more open process. Staying in close touch with the Task Group throughout the process and having an attitude of open communication are brought to this process as a result.

Finally the order in which focus groups and community surveys take place are the result of lessons learned. Often surveys are developed early to gather data that is "drilled down on" in focus groups. However, using this order of data gathering does not support follow up with a broader audience on information presented through stakeholder meetings. This proposal places community survey development directly following the Town Hall to enable a more informed survey protocol; one that can test more fully formed ideas and ask more focused questions about needs.

As a sole proprietor working with small budgets I have led many planning processes alone. Honestly, the team approach is far more beneficial to the client (and the consultant). For this project, I have chosen to find any means possible to provide additional team members who can bring their professional expertise and creative thinking to bear on the cultural plan for Lawrence. I have also increased the time onsite to provide better communication and less opportunity for the "disconnect" that can come once the consultant returns to the home office. There may be days onsite without a fully planned day, this time can be spent working on the plan and preparing for next steps with Commission staff or alone.

Project Design

The following project plan will be implemented over the six-month period from January through June 2015. It is designed around five site visits over the six-month period. The guiding principal is that more time onsite both in and out of structured process will yield a product that is grounded in true familiarity with the community and a more confident and focused effort between the consultant, the City and the Task Group. It allows for serendipity to arise and encourages creative thinking through spontaneity.

Project Design Elements

Site visits will be three or four days each with the final two (draft report feedback and plan presentation) being shorter trips. They provide time for one-on-one interviews, meetings with the Task Group and Commission staff, focus groups and key stakeholder contact. Each visit will be planned in advance with Commission staff.

Stakeholder interviews are one-on-one in either person or on the telephone. Meetings with a few key leaders at the same time who represent a particular issue or sector can be set up during site visits as well. Both individual and small group meetings are best for those who hold greater influence or for whom confidential or deeper conversations are more appropriate. People to include here would be leadership from the business and educational communities as well as city council members, executives from the major cultural institutions and participants in the Cultural District planning process.

Focus groups are recommended to bring larger stakeholder groups with common interests or characteristics together to gather top line ideas or a general sense of direction. From these meetings we can gather ideas to delve into more deeply through community surveys or other conversations. Key groups to consider are creative entrepreneurs, nonprofit arts organizations; emerging leaders in the arts (young arts professionals); students; artists etc. The total number of focus groups can be determined during the development of the project's scope of work.

The Town Hall is a half-day, open invitation event for the residents of Lawrence to participate in a structured morning or afternoon of conversation, keynotes and group idea and vision development. Given Lawrence's size and the already strong engagement of its residents, the Town Hall can be a lively and informative gathering that will not only build excitement about the plan's outcomes, but also begin to create a sense of community ownership.

David Plettner-Saunders will assist with facilitation of the Town Hall and other community process that takes place during the second site visit. He has led numerous large public engagement activities, tailoring each one to the character and personality of the community. Plettner-Saunders will work with Commission staff and I to develop the workshop.

Cultural Asset Mapping and Inventory will be developed 1) using existing data; and 2) through an added section on the community survey that will allow people to

self-report their creative organization or business in addition to identifying those they frequent. This information will be analyzed and aggregated for presentation.

Project Timeline

January

The first month will be used to finalize the scope of work and the consultant agreement. I will prepare the work plan and scope of work with deliverables in collaboration with Commission and City staff. Travel plans and agendas will also be made for the first site visit.

February

The first site visit (three days) will be in late January or early February. It includes a meeting with the Director or Arts and Culture (Commission staff) and appropriate City staff. A community tour will provide me with an overview of the city, its cultural facilities, community landmarks and gathering places. In addition, a meeting with the Task Group will allow time for discussing “big picture” ideas about the future of Lawrence and conduct a SWOT analysis to assist the consultant with a fuller understanding of the community. This is also time for her to build relationships with the Task Group and staff as a whole.

Following this meeting, Commission staff, the Task Group and I will plan for the second site visit (end of February, early March) during which the Town Hall will take place. There will also be time to review any additional relevant documents in preparation.

(Late February) March

The second site visit (approx. four days) will include the Town Hall community meeting as well as stakeholder interviews and focus groups. The Town Hall can kick off the visit with time onsite following for staff and consultants to review outcomes and plan for next steps.

We will prepare and launch the community survey in March to drill down on ideas and views expressed during the Town Hall meeting and community input to date. For this broader data gathering effort Surale Phillips will assist.

The cultural asset mapping and inventory can be part of the survey tool so that people can self identify cultural amenities in addition to those that are gathered through existing data.

April

In April a three-day site visit will provide time for Commission staff, the Task Group and the consultant to review findings to date, discuss next steps and outline key themes that have emerged from public engagement activities. Additional and final focus groups, stakeholder meetings or interviews will take place during this visit as well. From this onsite time, the consultant will begin to draft the plan and recommendations.

May

Data from the community survey will be prepared and available to inform recommendations and plan activities. The cultural asset mapping will be completed. I will spend the bulk of the month writing the first draft of the plan with input as needed from Commission staff. A two-day site visit at the end of the month is included to present and vet the draft recommendations to the community or other preferred stakeholders as determined by Commission staff.

June

Revisions to the plan will be made as necessary based on feedback gathered during the May site visit. At the end of June, the consultant returns for a final visit to present the plan to appropriate decision makers.

REFERENCES

Jennifer Gilligan Cole, Executive Director

Nashville Metro Arts

(615) 862-6733 (office)

Jennifer.cole@nashville.gov

Lead consultant. Currently working on an agency strategic plan that sets its direction for the next three to five years. All the public engagement tools proposed for Lawrence are used in this planning effort except the Town Hall. This will be completed in Spring 2015.

Kerry Adams Hapner, Executive Director

City of San José Office of Cultural Affairs

(408) 793-4344 (office)

kerry.adams-hapner@sanjoseca.gov

v.p.s. cartographie has a long standing relationship with the San José Office of Cultural Affairs (OCA). It began in 2006 with a sole consultant contract to assess the agency's arts education program. The assessment recommended that they create a strategic plan for arts education.

In 2008, I was a subconsultant to the Cultural Planning Group on the OCA's subsequent arts education strategic plan, which in 2010 expanded to include the development of a City-wide cultural component in the City's 30-Year General Plan Update. My subconsulting work included participation in all meetings, Town Hall, interviews, one-on-ones, as well as direct participation in planning, the conceptualizing of recommendations, and the final writing of the plan. A case study of this relationship is included on the *v.p.s. cartographie* website: <http://vpscartographie.com/client-stories/>

(continued on next page)

Victoria L. Hamilton (former Executive Director, City of San Diego Commission for Arts and Culture)

Arts & Community Development Manager, Jacobs Center for Neighborhood Innovation
(619) 527-6161; VHamilton@jacobscenter.org

I have had several municipal clients for projects unrelated to strategic or cultural planning. However, one of the most knowledgeable references I have for my work and my ability to take on this project is my former supervisor at the City of San Diego's Commission for Arts and Culture (1998-2005). Victoria and I have remained esteemed colleagues since our respective departures from the Commission. She is most familiar with what it takes to develop, carry out and successfully complete a cultural plan and can attest to my skills, capacities and commitment to this work as well as my ability to complete this project as described.

EXPERIENCE

My experience with local arts agency and arts organization planning includes cultural planning work as previously noted with the City of San José's Office of Cultural Affairs (as well as an arts education assessment and plan for the same that looked specifically at the role of the city arts agency in the provision or support of arts education across the city). I am currently working with Nashville's Metro Arts Commission on an agency strategic plan that will inform its direction for the next three to five years. Metro Arts budget (funded through the City's general operating fund) is \$2.4 million a substantial portion of which is re-granted. They have a staff of 6 FTE employees.

In 2011 I completed a three to five year strategic plan for Orchestra Nova, a San Diego organization with a \$2 million budget. This was also developed in a short time frame. It was my first opportunity to work with Surale Phillips and to understand how her skills as a market and audience researcher greatly enhanced the outcomes of my work with the client.

In addition, I have developed education and program plans for smaller organizations, researched feasibility options for organizations in crisis, developed project plans and worked with agency planning while at the City of San Diego's Commission for Arts and Culture. More recently, I've enjoyed working with individual creative entrepreneurs on the development of business plans for new ventures.

In 2010 I was invited to work with Americans for the Arts and the Arts Extension Service at the University of Massachusetts (Amherst) to develop a strategic and community planning training program for local arts agencies. The project centered on creating a training workshop to help local arts agencies manage strategic and community planning processes either with a consultant's support or on their own. The project was funded by the National Endowment for the Arts and piloted for Connecticut local arts agencies in November 2011. A workbook, day long facilitated workshop and power point presentation were developed for this effort in collaboration with staff from the Arts Extension Service and Americans for the Arts.

In July I completed a project with the Emerging Arts Leaders of Los Angeles to create a restructuring plan. I was hired to develop a strategic plan. The goals quickly shifted however to restructuring when it became clear that developing a plan for the future was second in priority to reevaluating how they were set up to operate as a volunteer organization and the need to change the structure to meet the realities of their human and financial resources. This was an incredibly gratifying process - working with young arts professionals to help them imagine how they could work better together in service to their peers and their communities.

My experience and my expertise working with local arts agencies spans more than 15 years of my 22+ years in the nonprofit arts sector. I have a keen sense of working at 10,000 feet as well as on the ground to make connections between the role of the arts agency in local government and in the community. My belief in the importance of the local arts agency in the cultural life of a town or city is balanced by the knowledge that much of arts management at this level is really about strong leadership and a bold vision. Cultural planning is an exciting process because it can unite that leadership and vision with a community's aspiration to create a vibrant cultural life for its residents and a memorable experience for its visitors.

COST PROPOSAL

Consultants' Fees*

Plettner-Saunders, V	160 hrs @ \$100 per hour	16,000
Phillips, Surale	12 hours at \$100 per hour	1,200
Plettner-Saunders, D	3-days on site @ n/c	-

SubTotal Fees

17,200

Travel**

(5 trips VPS/1 trip DPS)

Air	\$450 x 6 RT	2,700
Hotel***	\$160 x 18 nights	2,880
Airport Shuttle	\$213 x 5 RT	1,065
Per Diem	\$55 x 21	1,155

SubTotal Travel

7,800

Total Fees

\$25,000

*Consultants Fees are estimated based on an hourly rate within the budget limitations. They do not reflect actual hours spent to complete the project which will exceed those shown above.

**David Plettner-Saunders is not charging a consulting fee, but his travel expenses for the site visit are included here - 1 RT airfare and per diem for three days on site.

***The project budget is based on 13 total days on site. An additional night for each site visit is included in hotel figures to accommodate early or late flight schedules

RESUMES AND QUALIFICATIONS



Victoria Plettner-Saunders
 Chief Strategist and Founder
v.p.s. cartographie

Professional History

Founder and Chief Strategist <i>v.p.s. cartographie</i> An arts research, strategy and planning firm providing services focused on supporting individual and organizational capacity building for the nonprofit arts and culture and creative sectors.	2005-present San Diego, CA
Founder and Director <i>Art Career Café</i> A creative career development and job search website providing employer hiring assistance, resume and job application process support, and a national arts job database.	2012-present www.artcareercafe.com
Financial Analyst and Arts Program Manager <i>City of San Diego Commission for Arts and Culture</i>	1998 – 2005 San Diego, CA
Executive Director <i>San Diego Dance Institute</i>	1996 – 1998 San Diego, CA
Business and Marketing Director <i>Playwrights Project</i>	1992 - 1996 San Diego, CA
Managing Director <i>Malashock Dance & Company</i>	1991-1992 San Diego, CA

Consulting Client History

Strategic and Organizational Planning

Nashville Metro Arts Commission Agency Strategic Plan	Nashville, TN 2014
Emerging Arts Leaders/Los Angeles Restructuring Plan	Los Angeles, CA 2014
Orchestra Nova Three-Year Organizational Strategic Plan See project client story at (http://vpscartographie.com/client-stories/)	San Diego, CA 2011
City of San José Office of Cultural Affairs <i>Cultural Connection: City of San Jose's Cultural Plan for 2011-2020</i> <i>ARTS ENGAGE: A Strategic Plan for Arts Education and Cultural Learning</i> Sub-Consultant to the Cultural Planning Group, San Diego. See project client story at (http://vpscartographie.com/client-stories/)	San José, CA 2008-2011
Media Arts Center San Diego Education Plan Resource Development Plan	2007 2005

Research, Assessment, Writing

Grantmakers in the Arts

Disrupting the Status Quo : El Sistema, the Community Opus Project and School Reform in the Chula Vista Elementary School District, San Diego, CA. A researched article for GIA Reader. See publications listing for more information

2014

Lux Art Institute

Encinitas, CA

Education Program Assessment and Education Pavilion Expansion Study

2011

See project client story at (<http://vpscartographie.com/client-stories/>)

Balboa Theatre Foundation

San Diego, CA

Organizational Review and Strategic Recommendations

2011

The James Irvine Foundation

San Francisco, CA

Next Generation Arts Leadership: A Report to The James Irvine Foundation

2011

Millard Sheets Center for the Arts at Fairplex

Pomona, CA

Audience Assessment and Strategic Recommendations

2008

Illinois Arts Alliance

Chicago, IL

Arts Leadership for the 21st Century: Facilitated Mentoring and Peer Coaching Program Toolkit

2008

City of San José Office of Cultural Affairs

San José, CA

Arts Education Program Assessment

2006-2007

City of San Diego Commission for Arts and Culture

San Diego, CA

Folk and Traditional Arts Website Research, Development and Copywriting

2006

Project Planning and Coordination

California Alliance for Arts Education

Pasadena, CA

Co-Founder, Chair and Strategist, San Diego Alliance for Arts Education

2009-2013

See project client story at (<http://vpscartographie.com/client-stories/>)

San Diego Unified School District, Visual and Performing Arts Department

San Diego, CA

Partnership Coordination and Consultation, San Diego Arts Education Partnership

2004-2007

City of San Diego Commission for Arts and Culture

San Diego, CA

Founder and Coordinator, Emerging Leaders of Arts and Culture

2004-2007

NTC Foundation

San Diego CA

Project Coordinator, Dance Place San Diego

2006

Training and Facilitation

San Diego Magazine

San Diego, CA

Editorial Team Vision Retreat Facilitation

2013

Arts Extension Service at University of Massachusetts, Amherst

Amherst, MA

Co-Created/Presented with Americans for the Arts

2010-2011

Fundamentals of Strategic and Community Planning for Local Arts Agencies

San Diego Foundation

San Diego, CA

Emerging Leaders of Arts and Culture San Diego Strategic Plan Facilitation

2010

San Diego Archaeological Center

San Diego, CA

Board Retreat Facilitation

2009

Los Angeles County Arts Commission

Los Angeles, CA

Facilitator and advisor for Emerging Leaders Creative Conversation

2007

Arts Education

City of Carlsbad Cultural Arts Office

Carlsbad, CA

Three-Part-Art Curriculum and Resource Guide

2007

Grant Making

Nashville Metro Arts Commission

Out of State Adjudicator: Applicant organizations w/annual revenues in excess of \$1m.

Nashville, TN
2013

General Development and Grant Writing Support

San Diego Youth Symphony and Conservatory

2013-2014

La Jolla Music Society

2005-2010

Media Arts Center San Diego

2004-2010

San Diego Foundation

2008

Street of Dreams, San Diego

2008

Professional Leadership and Volunteer Activities

Americans for the Arts, Arts Education Network Council

2010-2012

Chair, 2011 and 2012

San Diego Unified School District Visual and Performing Arts Tiger Team

2011-2012

Chaired a community team that researched, wrote and presented a final report to the Board of Education, titled: *Understanding the District's arts education ecosystem to enable better decision-making on matters of policy and budget.*

Americans for the Arts Leadership Salon

2007

Invited Participant

Arts Education Preconference Planning Committee: Americans for the Arts Convention, Milwaukee
Committee Member

2006

California Arts Council

2005

Grant Proposal Review Panelist, Youth Education in the Arts Program

Eureka Foundation, San Diego

1996-1998

Fellow, Executive Director Fellowship Program

Speaking and Presenting Engagements

Session Co-Presenter w/ California Alliance for Arts Education, *Bringing Arts Education Advocacy Home*
Americans for the Arts Convention, San Diego

2011

Session Co-Presenter with the Illinois Arts Alliance, *The Facilitated Mentoring Tool Kit*
Americans for the Arts Convention, Philadelphia

2008

Session Presenter, *Keeping it Fresh: Professional Development for the Mid-Careerist*
Minnesota Nonprofit Leadership Conference, Minneapolis

2008

Keynote Speaker, *Listening to the Next Generation: Finding New Ways to Lead the Arts and Culture Field.* Facing Pages: A Statewide Literary Conference for LitTAP the New York State Literary Presenters
Technical Assistance Program

2007

Session Presenter, *MAPS to the Future: Mentoring in the Arts Programs*
Americans for the Arts Convention, Las Vegas

2007

Research and Published Articles

Disrupting the Status Quo: El Sistema, the Community Opus Project, and School Reform in the Chula Vista Elementary School District, San Diego, California. In *Grantmakers in the Arts, Reader: Vol. 25; No. 2* (Summer 2014), Seattle, WA.

Risks that Reward: How to Thrive as a First Time Executive Director. In *Leading Creatively: A Closer Look*, National Association of Media Arts and Culture, San Francisco, CA, 2010.

Mid-Career Professional Development: Long Term Asset or Short Term Liability. In *CultureWork: A Periodic* Vol. 12, No. 1., Center for Community Arts and Cultural Policy, Arts & Administration Program, University of Oregon, March 2008.

No Longer Emerging and Not Ready to Retire: A Look at Mid-Career Arts Managers. In *CultureWork: A Periodic Broadside for Arts and Culture Workers.* Vol. 11, No. 3., Center for Community Arts and Cultural Policy, Arts & Administration Program, University of Oregon, December 2007.

Listening to the Next Generation: Finding New Ways to Lead the Arts and Culture Field. Transcript of keynote address for Facing Pages: A Statewide Literary Conference for LitTAP: New York State Literary Presenters Technical Assistance Program, October 2007.

Bridging the Generation Gap in Arts and Culture Leadership: Taking the First Steps. In *CultureWork: A Periodic Broadside for Arts and Culture Workers.* Vol. 10, No. 4., Center for Community Arts and Cultural Policy, Arts & Administration Program, University of Oregon, December 2006.

Boomers, XY's and the Making of a Generational Shift in Arts Management. In *CultureWork: A Periodic Broadside for Arts and Culture Workers,* Vol. 10, No. 3., Center for Community Arts and Cultural Policy Arts & Administration Program, University of Oregon, August 2006.

Education

Bachelor of the Arts, Political Science
Willamette University

Salem, OR

Master of the Arts, Art Education/Art Administration
University of Oregon

Eugene, OR

Certifications

Facilitation Methods Certification, Technology of Participation, Institute of Cultural Affairs

2010

Certified Creativity Coach, Eric Maisel

2004

Certified Personal Coach, Franklin Covey Coaching

2003



David Plettner-Saunders
The Cultural Planning Group
California, Philadelphia and Hawai'i

David Plettner-Saunders, Managing Partner
4769 Kensington Drive
San Diego, CA 92116
david@culturalplanning.com
213-500-6692
www.culturalplanning.com

Overview of the Firm

The Cultural Planning Group is a consulting firm serving the field of arts and culture. We are based in California, Philadelphia and Hawai'i.

The field of arts and culture faces unprecedented challenges that include rapid and unpredictable change. Our focus is to help our clients address change and develop appropriate solutions.

Our Services

Planning

- Cultural and Creative Economy Planning
- Cultural Facilities Planning
- Creative Placemaking
- Strategic Planning
- Public Art Planning and Project Management
- Leadership and Organizational Transition
- Assessment and Capacity Building

Philanthropic Effectiveness

- Program Assessment and Design

Innovating

- Projects Reflecting Change in the Field

CPG Clients

Government Agencies

Broward County, Florida
California Arts Council
City and County of Denver
City of Charlotte, North Carolina
City of Dallas
City of Los Angeles Cultural Affairs Division
City of Minneapolis, Minnesota
City of Pasadena, California
City of Philadelphia, Office of Arts, Culture and the Creative Economy
City of Reno, Nevada
City of Riverside, California
City of San Antonio, Texas
City of San Diego, California
City of San José, California
City of Santa Monica, California
City of Thousand Oaks, California
City of Tracy, California
City of Upland, California
City of Ventura, California
County of Maui Office of Economic Development / Iao Theatre Restoration Initiatives Task Force, Hawai'i
District of Columbia, Washington
Los Alamos County, New Mexico
Los Angeles County Arts Commission
National Endowment for the Arts, Washington, DC
New Jersey State Council on the Arts
Ohio Arts Council
Salt Lake County, Center for the Arts
Salt Lake County, ZAP (Zoo, Arts & Parks) Program
San Francisco Redevelopment Agency
Sonoma County Economic Development Board

Foundations

California Community Foundation, Los Angeles
Hawai'i Community Foundation, Honolulu
Pew Center for Arts & Heritage, Philadelphia Cultural Management Initiative
The Community Foundation Serving Riverside and San Bernardino Counties, California
The Emily Hall Tremain Foundation, Connecticut
The James Irvine Foundation, San Francisco
The San Diego Foundation
Terasaki Foundation, Los Angeles
The Montgomery County Foundation, Pennsylvania

Arts and Cultural Organizations

African American Museum of Philadelphia
Amador County Arts Council, California
American Revolution Center, Philadelphia
Americans for the Arts, Washington, DC
Art Sanctuary, Philadelphia
Arts and Business Council of Greater Philadelphia
ArtsKC, Kansas City, Missouri
Chamber Music Hawai'i, Honolulu
Chandler Center for the Arts, Chandler, Arizona
Dallas Arts District Management Association and Arts Foundation
Dance/USA Philadelphia
Ennis House Foundation (Frank Lloyd Wright), Los Angeles
Exploratorium, San Francisco
Fresno Arts Council, California
Hawai'i Arts Ensemble (Halau Hula Ka No'eau), Honolulu and Waimea
Hawai'i Capital Cultural District, Honolulu
Historic Hawai'i Foundation, Honolulu
Humboldt Arts Council, California
IONA Contemporary Dance Theatre, Honolulu
L.A. Stage Alliance
LEONARDO/The International Society for the Arts, Sciences and Technology
Music Center of Los Angeles, Center Dance Association
Painted Bride Arts Center, Philadelphia

People's Light & Theatre Company, Malvern, Pennsylvania
PennPraxis, School of Design, University of Pennsylvania
The Philadelphia Singers
Raices Culturales Latino Americanas, Philadelphia
Scottsdale Public Art, Arizona
Side Street Projects, Pasadena, California
Southwest Chamber Music, Pasadena, California
Taller Puertorriqueño, Philadelphia
Wyck Association, Germantown, Pennsylvania
Yerba Buena Center for the Arts
Yuba Sutter Regional Arts Council, Marysville, California

Architecture/Urban Design Firms

DCE Design Community Environment, Berkeley
LMN Architects, Seat

Experience

We have extensive experience in strategic planning and cultural facilities planning. Many of these projects are creative placemaking projects, involving consideration of the broader community context for a cultural facility or program. We have also assisted organizations in preparing for a capital campaign, and we have extensive experience with organizations and arts agencies providing youth arts programming.

We are experts in assessments for arts organizations, which is the foundation for effective planning. We have developed methods for analyzing the finances, management, operations, staffing, structure and governance of diverse arts organizations, and we have held major contracts for such assessments with the National Endowment for the Arts, Pew Charitable Trusts, and the Hawai'i Community Foundation.

Our partners have managed, built, opened, and re-structured arts facilities, each containing educational spaces, providing us with a range of useful comparisons. These include the Yerba Buena Center for the Arts (San Francisco), Meyerson Symphony Center in Dallas, the Livermore Valley Performing Arts Center (California), and the Grand Theatre Center for the Arts in Tracy, California.

Our planning and research for cultural facilities always includes stakeholder engagement, and we have broad successful experience in interviewing and planning with board members, elected officials, funders, senior staff and school district officials. Finally, we are fluent in trends in arts management, including adapting audience engagement to respond to generational change, new technology, and increasing diversity.

David Plettner-Saunders, Partner and Co-Founder

David Plettner-Saunders is Co-Founder of The Cultural Planning Group. A consultant for 25 years, David has prepared cultural plans focusing on the creative economy for more than 30 communities, including Broward County, Sonoma County (California), San Antonio, Santa Monica, Los Alamos (New Mexico), San José, and Kansas City (Missouri). Other clients include the National Endowment for the Arts, the San Diego Foundation and the California Community Foundation.

David has prepared strategic plans and assessments for arts and cultural organizations of virtually all disciplines and sizes, and in a great variety of community contexts. These include Side Street Projects, an entirely mobile (off-the-grid) artist center in Los Angeles, Philadelphia Singers, a professional chorus, and Grand Theatre Center for the Arts, a multidisciplinary presenter and art center in Tracy, California. David has conducted a variety of original national and regional studies on individual artists and plans focusing on arts-in-education.

A retired modern dancer, David holds a J.D. from the University of North Carolina School of Law, Chapel Hill and a B.A. in Music from Wesleyan University. He is co-founder of the San Diego Alliance for Arts Education, responsible for successfully preserving and advancing arts education in one of the nation's largest school districts. He is the past Chair of the Southern California Dance Futures Fund and the Dance Resource Center of Greater Los Angeles.

Partners**Mark Anderson, Partner and Co-Founder**

Mark has worked in the nonprofit sector since 1982. He was a founder of ARTS Inc., a multidisciplinary service organization in Los Angeles that provided management consultations and interest-free loans to arts organizations. ARTS Inc. also created a graduate student internship program to encourage students of color to consider careers in arts management. In 1992 Mark became an independent consultant. He spent a great deal of the 1990s as a consultant to the National Endowment for the Arts where he developed expertise in grant making directed at balance-sheet related issues such as, eliminating debt and deficits, the purchase or upgrade of real property, and creating various reserve and endowment funds. Through CPG Mark has focused primarily on assessing nonprofit arts and cultural organizations and strategic planning. Mark has degrees from Colorado State University and MIT.

Jerry Allen, Partner

Jerry Allen brings 30 years of experience in the local arts agency and cultural planning fields. Beginning as a studio artist, he did graduate studies at the University of Washington, concentrating on studio art and public administration. He was the Visual Arts Coordinator for the King County Arts Commission (Seattle) in the mid-seventies. King County had one of the earliest percent for art programs in the nation and the first county program ever established. In that capacity, he conceived and administered King County's acclaimed EARTHWORKS: Land Reclamation as Sculpture Symposium, widely regarded as one of the seminal projects in the history of contemporary public art.

After serving three years as Executive Director of the King County Arts Commission, Jerry became the Director of Cultural Affairs for the City of Dallas, Texas. While there, he assisted with the formation of the Dallas Arts District and the Arts District Foundation. In that position, he developed the City's first cultural plan and policy and directed the first public art master plan ever completed by any city. Jerry went on to develop the Yerba Buena Arts Center in San

Francisco, California, and recently retired as the Director of the Office of Cultural Affairs in San Jose, CA, where he was responsible for a general fund budget of \$7 million and a public art budget of \$18 million.

Jerry's practice has included providing organizational development, strategic planning, meeting facilitation and leadership development assistance to dozens nonprofit cultural organizations. These have included organizations of all sizes, ranging from the Monterey Bach Society to the California Symphony Orchestra League to Americans for the Arts. He has developed business plans for numerous organizations, including the Meyerson Symphony Center in Dallas, the Yerba Buena Center for the Arts in San Francisco, and the Mexican Heritage Plaza in San Jose. As the manager of leading city arts agencies, he has reviewed and evaluated literally hundreds of organizational business plans submitted by grantees.

Martin Cohen, Partner

Martin Cohen joined The Cultural Planning Group in 2010 following a 30- year career in arts administration and arts philanthropy. His consulting practice focuses on strategic planning, research and community cultural planning. Since 2010 Martin has been working with Americans for the Arts in the design, development and management of the Local Arts Index. The LAI was launched in Spring 2012 and provides 52 secondary indicators on the health, breadth and vitality of arts and culture in every county in the United States (www.artsindexusa.org).

Prior to an active consulting practice, Martin served from 2001 to 2009 as director of the Philadelphia Cultural Management Initiative (PCMI), a program of the Pew Center for Arts & Heritage. In his role with PCMI, Martin conceived and implemented a comprehensive capacity building program focused on facilitating organizational change and implementing best practices throughout the arts, culture and heritage sector of the five-county Philadelphia region. During his tenure he created and launched programs focused on organizational assessment providing organizations with opportunities for guided reflection and planning. A particular focus of PCMI programming was on legacy and transition planning and preparing new leadership for their roles.

Prior to his position with PCMI, he served as executive director of Dance/USA (the national service organization for dance), the Kansas City Ballet, the Washington Ballet, and the AMAN Folk Ensemble of Los Angeles. Martin holds a B.S. degree in Arts Administration from Ohio University and certificates in mediation from CDR Associates of Boulder, CO and in executive coaching from the Wharton School Executive Education Program. He is currently a member of the Boards of Directors of Beth Shalom Synagogue, Jewish Learning Venture and PAPAYA (Philadelphia Area Performing Arts for Youth).

Karen Masaki, Partner

Karen Masaki brings in-depth knowledge of the Hawai'i culture and arts and funding communities to her role as consultant. She most recently worked on the assessment phase of a strategic planning project for ARTS First Partners, an arts education partnership in Hawai'i. She worked on a strategic planning project with Chamber Music Hawai'i and has conducted organizational assessments for a number of Hawai'i arts and cultural organizations. Karen was for eleven years Program Officer for Culture and Arts at the Hawai'i Community Foundation. She has served on three dance panels for the National Endowment for the Arts. Karen holds a graduate degree in dance from the University of Hawai'i and is a trained musician.

Surale Phillips
Decision Support Partners

PO Box 30547
Palm Beach Gardens, FL 33420
surale@suralephillips.com
C: 406.600.7537
W: 561.328.3039



Professional Experience

President, Research Consultant 2002-present
DECISION SUPPORT PARTNERS, INC.

Lead consultant to national client base of nonprofit organizations of varying budget sizes and artistic disciplines in planning, market and constituent research, and program evaluation. Consulting team member with other national firms on community cultural needs assessment and planning projects. Conducts business development, manages operations, consultants, and networks and presents through national service organizations. Founded company in 2002 in Bozeman, Montana and relocated to South Florida in 2013.

Executive Director 2009-2011
CLASSICS FOR KIDS FOUNDATION

Executive director responsibilities for instrument and mentoring grant-making organization through turnaround phase and redesign of program to national K-12 school base. Board member 2007-2008.

Vice President for Research and Administration 2000-2002
Research Director 1995-2000
Administrative Director 1991-1995
Administrative Assistant 1990-1991
ARTSMARKET, INC.

Designed and led all company research, participated in onsite consulting, report writing, project management, and business development. Managed staff of three. National client base. Started with company in Massachusetts and moved with company to Bozeman, Montana in 1996.

Account Representative 1989-1990
MASTERY EDUCATION

Notable Training, Presentation, and Commissions

2002-2013

Committee Member: Cultural & Aesthetic Grants, State of Montana (Fourth Term)
Consulting Coach and Presenter, Americans for the Arts National Convention
Consulting Coach and Presenter, National Arts Marketing Project Conference
National Field Assessment: Fund for Folk Culture
Sum of the Arts Report: Greater Kansas City Community Foundation
Workshops: Kentucky Arts Presenters, Midwest Council on Philanthropy, Pennsylvania Council for the Arts
Diversity Summit Presenter: City of San Diego Commission for Arts and Culture
Panelist: Southeastern Council on Foundations
Retreat Facilitator: Western States Folklore Society

Education and Training

B.A. in Art History with Arts Education Minor, University of Maryland 1986
Professional Certificates, SPSS, Inc. (Survey Design, Data Analysis, Text Analysis) 1998-2007
Professional training, Scan/US GIS market mapping

Experience

For 22 years, Surale Phillips has provided research and consulting services to the nonprofit sector with a focus on arts and culture. Her research supports projects in building nonprofit organizational capacity, audience and donor development, and marketing, community cultural planning, and program evaluation.

Her services have been the foundation for projects supported by the National Endowment for the Arts, Wallace Foundation, James Irvine Foundation, Paul G. Allen Family Foundation, and several community foundations around the U.S.

Clients have included foundations, arts service organizations, united arts funds, regional and local arts councils, performing arts presenters, festivals, museums, theater, opera, and dance companies, symphony orchestras, and institutions of higher education.

Surale's presenting engagements have included American's for the Arts National Convention, the National Arts Marketing Project Conference, Pennsylvania Governor's Arts Awards, Southeastern Conference on Foundations, Midwest Council on Philanthropy, Kentucky Arts Presenters, San Diego Commission on Cultural Affairs, and the American Folklore Society. She will be serving her fourth term on the Montana State Arts Council Cultural and Aesthetic Grants Committee in 2014.

From 2005 to 2007 she served as Executive Director for Classics for Kids Foundation in Bozeman, MT. Prior to founding Decision Support Partners, Inc. in 2002, Surale was Vice President of Research and Administration for ArtsMarket.