

DATE: January 4, 2013

TO: Kate Wagle, Acting Vice Provost, UO Portland
cc: Tina Rinaldi, Managing Director, Arts and Administration Program

FROM: Patricia Dewey, Director, Arts and Administration Program
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RE: AAD Portland Strategic Planning

Overview

Based on conversations that you and I have had earlier this term, as well as additional discussions that have taken place among Sandra Gladney, Tina Rinaldi, Bill Flood and me, and building on the UO Portland Situation Report process underway this year, I hereby submit for your consideration a draft proposal for a process to move forward with strategic program development for the Arts and Administration Program in Portland.

In short, we would like to partner with you in conducting a consultancy project to take place in winter and spring 2013. We wish to hire Bill Flood, community cultural development consultant and adjunct instructor in AAD, to facilitate this planning process in Portland. Bill, Tina and I have worked together over the past several months to articulate a clear set of objectives for this consultancy, as specified in this memorandum.

The core AAD Portland Strategic Planning team will consist of Bill, Tina and me, and we will bring in many other relevant partners and stakeholders for various discussions as we move through this process. In short, Bill's role will be to serve as AAD's liaison to the Portland arts, culture, and academic communities; he will focus on relationship cultivation and development and on knitting the team of project partners together. Tina and my role will be to oversee strategic program initiative development in line with strategic UO, AAA, and AAD priorities for program expansion in Portland.

Bill Flood completed for AAD an initial Portland planning document when the UO/AAA first began engagement in Portland. By updating these initial recommendations and building on considerable strategic planning and program development work done since that time, we view our background understanding of key training/professional development needs to be sufficient. We consider our program structure ready to enter the Portland market as soon as it is feasible to do so.

Anticipated Project Outcomes

By June 1, 2013, we will have completed a written strategic plan for AAD to build and expand operations in Portland. The plan will include targeted partners, priority areas of program investment and growth, and recommendations for specific action steps in 2013-2014.

In order to prepare this strategic plan, Bill Flood will facilitate throughout winter and spring 2013 a series of meetings and planning sessions among key AAD personnel, current (and future?) adjunct instructors, Portland-based arts sector leaders, and Portland-based academic stakeholders. Our first date scheduled for such meetings is January 18, 2013.

In addition to program development plans, **specific outcomes of this consultancy will include the following:**

1. Identification of arts management-related educational offerings and key educational partners in Portland (especially PSU and PNCA);
2. Cultivation of a team of qualified local and regional/national professionals and educators who are interested in serving as faculty for our proposed Portland-based programs;
3. Program relationship development with primary Portland partner agencies, including Regional Arts and Culture Council, Nonprofit Association of Oregon, Portland Art Museum, Portland Center for the Performing Arts, Oregon Arts Commission, and Business for Culture and the Arts;
4. Continued cultivation of strong professional links for AAD with its impressive group of Portland-based alumni as well as other emerging professional leaders in the regional arts and culture sector;
5. Completion of a current and updated report on key training and professional development needs of arts managers (AAD graduate student assistants will complete this portion of the project from information readily available online and in our program files)

Priority areas to focus this consultancy project:

AAD sees two main areas of focus for its Portland programs:

1. To increase visibility and impact as a regional professional development and research hub;
2. To develop niche certificate and intensive programs that differ from program offerings in Eugene.

Priority areas of AAD immediate programming interest are:

1. Developing a low-residency, one-year (12 months) executive master's degree in arts management (targeting national and international participants)
2. Developing a certificate (or other) program in urban cultural planning and developing (targeting local, regional, national, and international participants)

3. Developing a certification program for arts educators working in K-12 Portland Schools (targeting specific needs of the Portland public schools)
4. Exploring opportunities for program development in museum/curatorial studies
5. Ensuring that business models associated with program development in Portland will generate revenue

Specifically targeted AAD initiatives include, but are not limited to the following:

- Work with consultant/NTTF Bill Flood to develop an AAD Portland Strategic Plan in winter and spring 2013; facilitate conversations with prospective Portland-based partners throughout this process.
- Continue ongoing symposia and regional professional development gatherings on topics of interest to AAD/CCACP constituencies
- Host the AAAE conference in spring 2015. (We need to prepare a bid and submit it to the AAAE board as soon as possible.)
- Begin discussions with AAA and PSU faculty on developing a collaborative niche specialization (certificate?) in *urban cultural planning and development*.
- Begin discussions with AAA, UO, and Portland-based partners about developing a niche program in museum studies / curatorial studies.
- Prepare a strategic plan for the White Box (as associated with museum studies / curatorial studies)
- Partner to promote summer gen ed course offerings (Urban Ducks)
- Consider opportunities to develop hybrid, on-line, or low-residency arts administration courses of study in arts administration for mid-career professionals
- Consider development of intensive summer programs in collaboration with professional development associations
- Consider additional opportunities for collaboration in Portland with other AAA academic units – (e.g., HP, PPPM, Art History)
- Identify, recruit, and build a team of Portland-based adjunct instructors
- Consider opportunities for developing certification programs for Arts Educators for Portland Schools (CAN initiative)

Anticipated Consultancy/Project Expenses

For the most part, expenses associated with the AAD Portland Strategic Planning Project in winter and spring 2013 will be absorbed through existing AAD expense lines for personnel, travel, development, and communications expenses.

Additional expenses will be associated with Bill Flood's consultancy. Bill's basic consultancy fee is \$125 per hour; he charges half of this rate for drive time (for required Eugene-Portland travel).

Building on Bill's initial consultancy proposal submitted December 11, 2012 and conversations that have taken place since that time, I propose the following general structure of contracted tasks and associated hours/costs. Many items initially included in Bill's proposal can be completed by the existing administrative structure of AAD (Tina, Patricia, and graduate student assistants). Below are responsibility areas that I view as distinctly requiring Bill's professional expertise and network.

Goals, Objectives, and Outcomes	Consultant Activities and Schedule	Hours and Costs at \$125/hour
<p>Review, update, and revise report prepared for AAD in 2006 on Opportunities Assessment including arts management related trainings, workshops, courses, and gathered preliminary ideas from Portland-based arts leaders on their visions for AAD.</p>	<p>Research existing offerings at RACC, NAO, and all of Portland's Universities and Colleges (students compile data; Bill integrates information in report)</p> <p>Hold telephone and/or face-to-face meetings with key stakeholders in Portland to compile additional information necessary to update the 2006 report.</p> <p>Completion: January-February 2013</p>	<p>20 hours \$2,500</p>
<p>Coordinate and facilitate meetings with key Portland institutions and stakeholders for purposes of partnership development. Agencies include but are not limited to the Regional Arts and Culture Council, Nonprofit Association of Oregon, PSU Fine and Performing Arts, PSU Urban Studies, Portland Art Museum, Oregon Arts Commission, Business for Culture and the Arts.</p>	<p>Serve as Portland-based professional liaison for AAD.</p> <p>Identify key potential partners, and facilitate relationship development opportunities</p> <p>Coordinate or assist in coordinating meetings for purposes of project development and relationship development</p> <p>Completion: January – March</p>	<p>25 hours \$3,125</p>

<p>Identify qualified local, regional, and national instructors to serve as instructors, guest lecturers, and workshop leaders for AAD's Portland-based programs.</p>	<p>Serve as Portland's on-site AAD liaison for purposes of relationship cultivation of adjunct instructor team.</p> <p>(AAD administrative personnel in Eugene will maintain contact lists, resumes, and formal correspondence regarding team development)</p> <p>Completion: January - May</p>	<p>10 hours \$1,250</p>
<p>Consistent strategic planning and curricular development meetings and discussions with Tina, Patricia, and other key stakeholders.</p>	<p>Weekly communications via email and phone as needed (24 weeks @ 1 hour per week), January - June</p> <p>3 Core Planning Committee Meetings in Eugene (9 hours total)</p> <p>3 Core Planning Committee Meetings in Portland (9 hours total)</p> <p>Meeting preparation and follow-up (12 hours total)</p> <p>Completion: January - June</p>	<p>\$3,000</p> <p>\$1,125</p> <p>\$1,125</p> <p>\$1,500</p>
<p>Travel expenses</p>	<p>Drive time for 3 Eugene meetings (12 hours billed at ½ normal rate)</p> <p>Roundtrip mileage for 3 Eugene meetings (220 x 56.5 cents per trip = \$124.30 per trip)</p>	<p>\$ 750</p> <p>\$ 372.90</p>
<p>Ad hoc meetings and communications</p>	<p>Additional strategic planning work, correspondence, and meetings as needed from January to June (2 hours per month)</p>	<p>12 hours \$1,500</p>
<p>Total Consultancy Budget</p>		<p>\$14,747.90</p>