

EASTERN MARKET



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THE CREATIVE DC ACTION AGENDA

AN INITIATIVE OF THE DC OFFICE OF PLANNING

AND THE WASHINGTON, DC ECONOMIC PARTNERSHIP



ACKNOWLEDGEMENTS



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MAY 2010

CREATIVE DC ACTION AGENDA

“We are building a world-class, inclusive city. And we are committed to doing everything that we can to ensure the success of this dynamic sector of our economy.”

— *Adrian M. Fenty, Mayor of the District of Columbia*

“The District’s creative economy is far more significant than we previously thought, with creative jobs amounting to more than 10 percent of the city’s employment base and generating \$5 billion in income. This sector is also at the heart of the small business economy — it relies on innovation and entrepreneurship, and provides income and employment opportunities to residents. The District has the key assets needed to sustain this sector and maintain a competitive edge, such as the presence of federal government and foreign missions that sponsor cultural facilities and events. With the new understanding of the District’s creative economy that this report provides, we can celebrate our identity as a creative city and take steps to strengthen our position by expanding our creative jobs base and attracting additional businesses.”

— *Valerie-Joy Santos, Deputy Mayor for Planning and Economic Development*

“This study puts the District in a new light — we are truly a creative city, where creativity and talent combine to enliven our community and enhance our competitiveness. Whether it is a performing arts festival or a multimedia design firm, creative enterprises are providing employment and business opportunities for residents, and contributing to the economic stability of the District. The creative economy is also helping to reconnect and revitalize emerging areas of the city, with arts and cultural activities attracting residents and visitors, and helping neighborhoods develop an even more distinctive sense of place. By nurturing these assets, we can take our creative economy to the next level, and help communities throughout the city grow into more robust neighborhoods.”

— *Harriet Tregoning, Director of the DC Office of Planning*

“This study is not just the tallying of pastry chefs, musicians and broadcast journalists, it is a window into the below-the-radar community of businesspeople and professionals of all stripes who have not been well represented in our research until now. This is a glimpse at another DC that is emerging in our midst. The purchasing power, housing preferences, and cultural appetites of these ‘creatives’ — when understood as a market segment — create new opportunities for businesses in DC.”

— *Steve Moore, President and CEO of the Washington, DC Economic Partnership*

“The contribution that arts and culture make to the District is validated by this study. The diverse range of world class creative sectors — from media arts and technology to fine arts — defines a compelling component of the District’s economy and brand. Innovation is born from this group, driving the vibrancy of our communities. We now have a blueprint for strengthening this base through arts education and the development of our local arts and cultural assets.”

— *Gloria Nauden, Executive Director of the DC Commission on the Arts and Humanities*

“The arts are a vital economic driver in the District of Columbia; together, artists, creative businesses, cultural nonprofits and government partners play important roles and directly impact the District’s economy. Artist live-work housing, for example, can help revitalize neighborhoods, attract new businesses, generate jobs and revenue, and enhance the quality of life for residents.”

— *Leila Edmonds, Director of the DC Department of Housing and Community Development*

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photography by: Zema Wallace



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Images 1, 2, 4 and 6: Commissioned by the DC Creates! Public Art Program through the DC Commission on the Arts and Humanities

Executive Summary

Another Washington, DC exists, hiding in plain sight alongside and within the governmental enclave, tourist sites, and monuments: a Washington that stands as a center for creativity and arts with few rivals in the U.S. or worldwide.

Washington, DC occupies a unique place among American cities. It is the center of our political system and it is also renowned as a cultural and historical destination, boasting sites such as the Capitol and White House, as well as the Smithsonian Institution and other well-known and much-loved museums.

But another Washington, DC exists, hiding in plain sight alongside and within the governmental enclave, tourist sites, and monuments: a Washington that stands as a center for creativity and arts with few rivals in the U.S. or worldwide. The city's "creative sector"—a phrase referring to enterprises in and for which creative content drives both economic and cultural value, including businesses, individuals, and organizations engaged in every stage of the creative process—acts as a local economic driver creating a significant number of jobs, income, and revenues for the city and its residents. Those creative enterprises, ranging from well-known cultural venues and enormously influential media to vibrant visual arts and theater communities, innovative design, and emerging world-class cuisine, are helping to create a new identity for Washington, independent of the established perceptions



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and potentially of far greater importance and value in the lives of Washingtonians themselves.

PURPOSE

This report, the *Creative DC Action Agenda* (the Action Agenda), was commissioned by the DC Office of Planning and the Washington, DC Economic Partnership to quantify and put into context the creative economy of the District, giving the city's myriad arts and cultural endeavors their rightful recognition and making the case that the creative sector can act as a powerful tool for job creation and economic growth in neighborhoods across the city. This Action Agenda is intended to provide a blueprint for the public, private, and nonprofit sectors as well as for residents as they seek to realize the following outcomes:

- **REVITALIZATION** of underserved neighborhoods through arts and creative uses that generate new business creation, employment for residents, and income for communities;

- **GENERATION OF NEW WORK OPPORTUNITIES** for youth, entrepreneurs in the creative economy, and the underemployed;
- **FURTHERING A “SENSE OF PLACE”** for both city residents and visitors in distinctive DC communities such as Columbia Heights, 14th and U streets, Anacostia, and Brookland;
- **LIVELIER STREETS AND NEIGHBORHOODS** through active use of currently vacant and underutilized space;
- **MORE IMPACT FOR PLANNING** at the neighborhood level, including art and culture zoning review, and strategic efforts to raise the level of retail activity; and
- **GREATER LINKAGES** between the District’s assets and support systems, including public education and workforce development.

ECONOMIC SIGNIFICANCE

Already, Washington’s creative economy has a tremendous foundation to build upon. Both in absolute and relative terms, the sector is a powerhouse: it accounts for more than 75,000 jobs—about 10 percent of all jobs in the District of Columbia—and over 10,000 establishments. These creative jobs account for approximately \$5 billion in wages. Among those 75,000 jobs are more than 16,000 federal government positions at cultural institutions such as the National Archives and Kennedy Center for Performing Arts, as well as nearly 7,000 self-employed individuals who serve as sole proprietors of creative enterprises. Even excluding workers who are self-employed or hold government jobs, the number of creative sector jobs is larger than in sectors such as technology, financial services, and education, and, until the recent economic downturn, new job creation in the creative economy easily outpaced the rate of job growth in those other sectors. The city’s creative economy is also larger as a proportion of total employment than is the case in the DC metro region and the United States as a whole.

Talent increasingly drives this creative economy as the District becomes more and more a city of choice for many in creative fields. In addition to creative workers employed in explicitly creative enterprises, thousands of Washingtonians do creative work in other industries—such as music and arts teachers in public and private schools. The District has a very high concentration of writers, visual artists, architects, interior designers, musicians, and graphic designers. In all, more than 36,000 city residents are in such positions, earning median hourly wages of \$33.75, more than two dollars above the citywide median. Yet another indication of how DC has become a national center for creative efforts is a study of data from the 2000 Census, which found that the DC metro area ranked fourth in concentration of artistic talent as measured by the occupations of residents, trailing only Los Angeles, New York, and San Francisco.

This creative talent provides a rich ecosystem for new enterprises and new opportunities that can raise the competitiveness of the District’s economy in the future. Beyond the Mall, beyond its image as a “government” town, Washington, DC is poised to become a center of the national creative economy.

While the tangible effects of Washington’s creative economy and its workers are important enough, less quantifiable impacts of creative activity should not be overlooked. Creative industries, including performing arts and culinary enterprises, not only contribute to the city’s overall appeal to tourists; as those activities gain a higher profile, they help make the District a more attractive destination for the sort of high-value “knowledge workers” on which local economies increasingly depend. The emergence of creative endeavors also has begun to transform neighborhoods across the city, heightening their character and appeal that might have been previously overlooked.

CREATIVE SEGMENTS

The diversity of the city's creative economy goes well beyond the most well known cultural assets on the National Mall and Downtown. The *Creative DC Action Agenda* identified and assessed six key segments, or industry groups, which encompass the city's creative sector: museums and heritage, building arts, culinary arts, performing arts, media and communications, and visual arts and crafts. The Action Agenda also captures the creative strengths and assets in all of the city's neighborhoods to ensure that economic opportunities reach all parts of the District, particularly underserved areas where creative activities could benefit youth and underemployed and unemployed residents.

The best-known segment of Washington's creative economy is its museums and historical sites. With one of the largest concentrations of museums in the U.S., this segment provides 10,454 direct jobs and accounts for 14 percent of all creative sector jobs in the District. The institutions that describe and represent the nation's history, cultural products, and achievements are the premier attractions for families, foreign tourists, and youth groups visiting the city. In addition to the significant number of jobs associated with DC's museums and the tourism-related economic impacts, this segment of the creative economy also generates a market for many other local businesses, including graphic artists, caterers, museum exhibit designers, and art handlers.

In terms of employment, the largest segment in the District is media and communications, which provides 32,132 jobs and over \$3 billion in wages in the District. As with any city of comparable size, metropolitan Washington has numerous local television, radio, and print institutions. But the full scope and scale of this segment comes from the additional media outlets that bring national and international political news and analysis and their own special culture to the world at large. The District is home to National Public Radio, National Geographic, C-SPAN, and Black Entertainment Network, to name a few. The

concentration of employment in television and radio in the District is five times the national average. In addition, proximate to the city are additional major media and entertainment companies including the Discovery Channel, the Travel Channel, and *USA Today*. Beyond these companies, most major news organizations and magazines around the world have some local presence via a Washington news bureau or desk. While not thought of as a national center for publishing, the concentration of employment in newspaper, periodical, and book publishing is six times the national average. A number of the magazines with the largest circulation in the nation, such as *National Geographic*, the *Smithsonian* magazine, and *AARP The Magazine* (the world's largest circulation magazine) are headquartered in Washington, DC.

While not as large in terms of employment, accounting for just fewer than 5,000 jobs, the District's performing arts segment has become an increasingly vibrant and growing part of the creative economy. In recent years, the performing arts industry in the District has blossomed with new theaters and plays, innovative dance companies, and an eclectic mix of musical styles and genres. The city's mix of theater companies and venues includes the Kennedy Center for the Performing Arts, Arena Stage, Shakespeare Theater Company, Washington National Opera, and the Washington Ballet. To this mix can be added the Woolly Mammoth, Studio Theatre, the Source, the Warehouse, the Atlas Performing Arts Center, and the Gala Theatre, a center for Latino performing arts. The annual Capital Fringe Festival adds even more cutting-edge flavor to DC's theater scene. With 69 theaters producing 8,723 performances in 2008, DC is now among the top tier of theater cities in the U.S. In fact, the Helen Hayes Awards notes that Washington's theater community is "second to New York City in its breadth and depth of offerings."¹

The music industry, like many other components

of the DC creative economy, is notable for its breadth. The District ranks among the top tier of major cities in the number and quality of its choirs and choral groups; has a long and rich history in jazz; was at the forefront of punk music; and has its own music genre, go-go music, a mix of funk, rap, and heavy percussion that got its start in the 1970s. Every night offers a full range of music performances at major concert halls and performing arts facilities, churches, neighborhood bars and clubs, and venues of higher education institutions in the city.

A growing cadre of new chefs has brought energy, visibility, and a range of high-end cuisine to the District, giving the culinary arts a more distinctive image. This segment accounts for 24 percent of total creative sector jobs in the District, and 9 percent of wages in the sector. This segment of the District's creative economy, like many others, also has a deep connection to the city's African-American culture and heritage and to the city's international diversity. The city's diversity is reflected in its Ethiopian, Brazilian, Indian, French, German, Spanish, Moroccan, Thai, Mexican, Afghan, Greek, Peruvian, Vietnamese, and Belgian restaurants, which can be found in the downtown as well as in the neighborhoods.

Surprising to most is the incredibly high concentration of individuals and businesses involved in the building arts, including architecture, landscape architecture, and interior design. This segment of the creative economy accounts for 10 percent of total creative sector jobs in the District and 12 percent of wages in the sector. The importance of the District as an architectural center is reflected in its relatively high concentration of architectural industry employment, about 4.5 times the national average.

Finally, while the smallest of the six segments, officially accounting for only about 2,000 jobs, the visual arts and crafts segment involves many individual artists and artisans who often sell their products in local galleries, via the Internet, and at local markets. Washington, DC has a growing cadre of painters, photographers, sculptors, potters, glassblowers, metal artists, jewelers, fashion

designers, and other artisans as well as the galleries that display and sell them. This segment, the smallest of the six, accounts for 3 percent of total creative sector jobs in the District, and just 1 percent of all creative sector wages.

CREATIVE PLACES

The creative talent and enterprises in each of these segments are spread throughout the District. Washington is a city of neighborhoods, each with its own distinctive history and cultural and creative assets. Perhaps because of these differences, each neighborhood expresses creativity in its own way, through fine and performing arts, media, cuisine, and culture. For example:

- **THE U AND 14TH STREETS AREA**, once known as the nation's "Black Broadway," which produced or attracted legendary performers Cab Calloway, Pearl Bailey, Sarah Vaughn, Billie Holliday, Duke Ellington, Miles Davis, John Coltrane, and Cannonball Adderly, is now one of the city's most vibrant arts, entertainment, and cultural scenes.
- **DOWNTOWN**, the most accessible location for tourists and government employees, features six independent theaters where more than half a million people attended shows in 2007; many more dined at one of the downtown restaurants or enjoyed an evening at one of the numerous dance clubs.
- **ANACOSTIA** in southeast Washington is one of the city's premier historic districts, the only neighborhood east of the Anacostia River on the National Register of Historic Places. The neighborhood is also evolving into a creative cluster, with new galleries and artist housing.
- **GEORGETOWN** is home to a world-class university and charming 19th century streetscapes, and is a location of choice for many of the architecture and design firms in the city.
- **DUPONT CIRCLE**, the historic center of gay life and culture in the city, offers a wealth of bookstores, cafes, many associations and nonprofit headquarters, and a growing cluster of digital arts companies.

- **BROOKLAND** features the homes of prominent African-Americans such as Nobel Prize winner Ralph Bunche, first African-American cabinet member Robert Clifton Weaver, and impressionistic artist Lois Mailou Jones, all open to tourists. The neighborhood is also home to Dance Place and the site for new artist live-work units.

CHALLENGES

For all its current success and future promise, the creative economy in Washington, DC does face a number of challenges that could limit future growth. The inaccurate but lingering perception of DC’s creativity as lagging behind that of other cities such as New York and Chicago hampers activity in several sub-fields, notably building arts and performing arts, as does a shortage of affordable space for artist housing, start-up creative enterprises, and the production of creative goods. Many of the District’s incredible assets, such as its rich international culture, have not been effectively leveraged and the tourism infrastructure is not structured to maximize visitation to the city’s cultural venues or assets throughout its diverse neighborhoods. While there is a strong support system that underlies the creative economy, its effectiveness has been somewhat constrained by a lack of effective coordination and leadership as well as limited cross-segment and cross-generational networking. And, while the entrepreneurial energy and potential is great, the District has not taken full advantage of the considerable opportunities for business development and job growth in some of its creative industries.

ACTION AGENDA

Shorter-term pressures from the recession threaten to undo some recent growth in the creative economy and have put additional pressures on many of the individual artists, nonprofit cultural organizations, and creative businesses in the District. The Action Agenda offers a clear and structured Action Agenda to safeguard gains to

this point and to accelerate progress toward the economic and cultural objectives that underpin so much creative sector activity in Washington. That Agenda addresses a range of challenges and opportunities and lays out six key goals in the following areas, with specific strategies and actions for each:

- **CREATIVE SUPPORT:** enhancing the support system to take better advantage of the city’s deep creative assets.
- **CREATIVE MARKETS:** promoting the District’s creative economy and increasing the market for creative products.
- **CREATIVE YOUTH:** enabling youth to explore and capitalize upon their creative talents.
- **CREATIVE WORK:** providing new career opportunities for residents and an enhanced talent pool for creative businesses and organizations.
- **CREATIVE BUSINESS:** promoting new enterprise development and small business growth among creative firms and entrepreneurs.
- **CREATIVE PLACES:** developing a diversity of creative neighborhoods and spaces throughout the District.

IMMEDIATE PRIORITIES

To create momentum for implementing the strategies and action steps, key District agencies in partnership with the Washington, DC Economic Partnership and other private and nonprofit stakeholders should play a leading role by spearheading the following immediate action projects, which can be undertaken in the short-term and can help lay the foundation for some of the longer-term strategies and action steps:

- Ensure that the findings and recommendations of the *Creative DC Action Agenda* are linked to other city planning and investment activities (e.g., DCCAH’s strategic plan, neighborhood revitalization efforts, zoning update, Great Streets, and NIF) in order to leverage resources related to priority projects.



MARISA GAITHER FLOWERS, GREEN DOOR ADVISORS, LLC, 2009

.....
While there is a strong support system that underlies the creative economy, its effectiveness has been somewhat constrained by a lack of effective coordination and leadership and limited cross-segment and cross-generational networking.

- Coordinate a coalition of private, nonprofit, and public sector stakeholders to work collectively to move the Action Agenda forward.
- Support networking opportunities within creative industry segments (e.g., music, theatre, museum, digital arts) as well as across segments that bring together the business community, creative enterprises, and nonprofit cultural institutions more regularly to discuss potential strategic partnerships.
- Increase visitor awareness of DC's creative assets by enhancing the visitor information system. Efforts could include rethinking the location and operation of the visitor center(s) in the city, placing kiosks in the neighborhoods, and more effectively coordinating cultural calendars.
- Coordinate with stakeholders from the green, retail, and creative industries to make progress on immediate synergistic projects that leverage public, private, and nonprofit resources and partnerships.
- Organize a creative 'spacefinder' initiative that provides information on the availability and location of creative spaces throughout the city, and matches creatives in need of space with property owners, developers, and brokers. Matching strategies could include in-person forums as well as a web-based tool that acts as a clearinghouse of information.
- Implement a targeted program that activates vacant and underutilized space on a temporary basis with creative uses. Efforts include identifying publicly- and/or privately-owned sites for creative temporary uses and investigating funding opportunities.
- Coordinate opportunities for the development of affordable housing and live-work space, and provide public sector assistance as appropriate (for example, via public-private partnerships, financing, land dispositions, and zoning support).

Introduction

.....
As visitors discover the wealth of talented people, entertaining events, and interesting places in Washington's neighborhoods, many will come to see the District as a return destination rather than a one-time place to visit.
.....

In 2008, 16.6 million visitors to Washington, DC enjoyed attractions such as the White House, the Capitol, the Lincoln Memorial, the museums of the Smithsonian Institution, and other well-known symbols of America's proud history. But the city offers a plethora of other cultural and creative assets beyond the usual sightseeing destinations on and around the Mall of which many visitors are largely unaware.

Within informed circles, Washington's reputation as a center for creative endeavors is well established. In its ranking of the country's largest 25 cities with top art destinations, *American Style Magazine* placed Washington, DC third.² This suggests a great opportunity to reach tourists looking to enjoy activities and experiences outside the city's established persona. As visitors discover the wealth of talented people, entertaining events, and interesting places in Washington's neighborhoods, many will come to see the District as a return destination rather than a one-time place to visit.

Beyond tourism, a foundation is in place for civic, business, and nonprofit leaders to position Washington



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as a world-class center of arts, culture, design, and media. As the center of national public life, the city boasts a tremendous concentration of media enterprises, from news bureaus to film crews. Alongside the various layers of government is a vast range of vibrant ethnic cultures, arts, and foods. Washington's impressive array of education institutions maintains a pipeline of both talented creative workers and people receptive to the products of their efforts, and offers a gateway to opportunity and a source of creative services in addition to supporting the entertainment and cultural scene through performances, lectures, and exhibits.

All of these elements make DC one of the world's hot spots of creativity. Yet despite the intensity of the creative economy, its value is not fully appreciated and its potential is not fully realized. This is due in part to the importance of creative enterprises and work in the economic life of the community not having been evaluated and studied.

The *Creative DC Action Agenda* was commissioned by the DC Office of Planning in partnership with the Washington, DC Economic Partnership. Participating

agencies include the DC Commission on the Arts and Humanities and the Department of Housing and Community Development. The Action Agenda seeks to provide a more accurate measure of the economic value of the creative economy to Washington, DC and applies the same analytic tools to the creative sector as to any other sector of the economy. It evaluates the creative sector as a set of economic enterprises, including their employees and value chains (i.e., their suppliers, producers, distributors, and markets). The characteristic that sets these enterprises apart from those in other sectors—in other words, what makes them creative—is that the experience associated with the creative or cultural content of their goods or services adds economic value.

The findings and recommendations for the Action Agenda emerge from an intensive yearlong research process that involved the collection and analysis of economic data; an inventory of key cultural assets including theaters, galleries, museums, artist housing and workspace, and community art centers; and interviews and focus groups with close to 200 individuals in the District who are involved in the full range of creative industries and support organizations.³

The *Creative DC Action Agenda* seeks to underscore the importance of Washington's creative economy and to suggest that the city can derive significant economic benefit from the prudent management of this valuable resource by the public, private, and nonprofit sectors. While each neighborhood boasts its own resources and needs, the city's creative economy as a whole is sufficiently large, diverse, and vibrant both to provide expanding employment and economic opportunities to residents and businesses and to support a world-class range of cultural activities and entertainment for visitors.

The scale of employment in the enterprises involved in the creative economy^{3/4} and the remarkable talents of those who are employed in this sector^{3/4} make a powerful case for paying closer attention to strategies that can encourage economic growth. This analysis of the city's

creative economy sets forth an Action Agenda that will leverage the city's wide range of creative assets and expand economic opportunities and benefits to more effectively reach all of its residents and neighborhoods by:

- Supporting actions to revitalize underserved neighborhoods through arts and creative uses (income, business, employment, and activity generation);
- Providing opportunities for youth, entrepreneurs, and the underemployed;
- Helping to foster a sense of place for all neighborhoods;
- Enlivening communities through active uses, including vacant and underutilized sites;
- Leveraging planning and public investment efforts; and
- Better utilizing and connecting the city's economic support systems—particularly its education and workforce development systems.

The *Creative DC Action Agenda* provides the framework to leverage the compelling strengths of the District's creative economy and to manage its significant challenges through the following six goals:

- **CREATIVE SUPPORT:** enhancing the support system to take better advantage of the city's deep creative assets.
- **CREATIVE MARKETS:** promoting the District's creative economy and increasing the market for creative products.
- **CREATIVE YOUTH:** enabling youth to explore and capitalize upon their creative talents.
- **CREATIVE WORK:** providing new career opportunities for residents and an enhanced talent pool for creative businesses and organizations.
- **CREATIVE BUSINESS:** promoting new enterprise development and small business growth among creative firms and entrepreneurs.
- **CREATIVE PLACES:** developing a diversity of creative neighborhoods and spaces throughout the District.

Washington, DC has an enormous opportunity to build upon the existing and potential strengths of the creative economy in ways that create jobs, attract and retain vital human and financial capital, and produce an even higher quality of life for its residents. On June 18, 2009, a *USA Today* headline read, “Washington is morphing into a pretty cool district.”⁴ In the words of one television executive, “The perception outside of DC is that it’s a

happening place with a charismatic new leader in town and a revitalized social scene.” The following Action Agenda describes the full scale and scope of the creative economy, the assets on which the city can build, and what it will take to make sure that the city fulfills the promise associated with the creative economy for all of its neighborhoods and residents.



The Economic Significance of the Creative Sector in Washington, DC

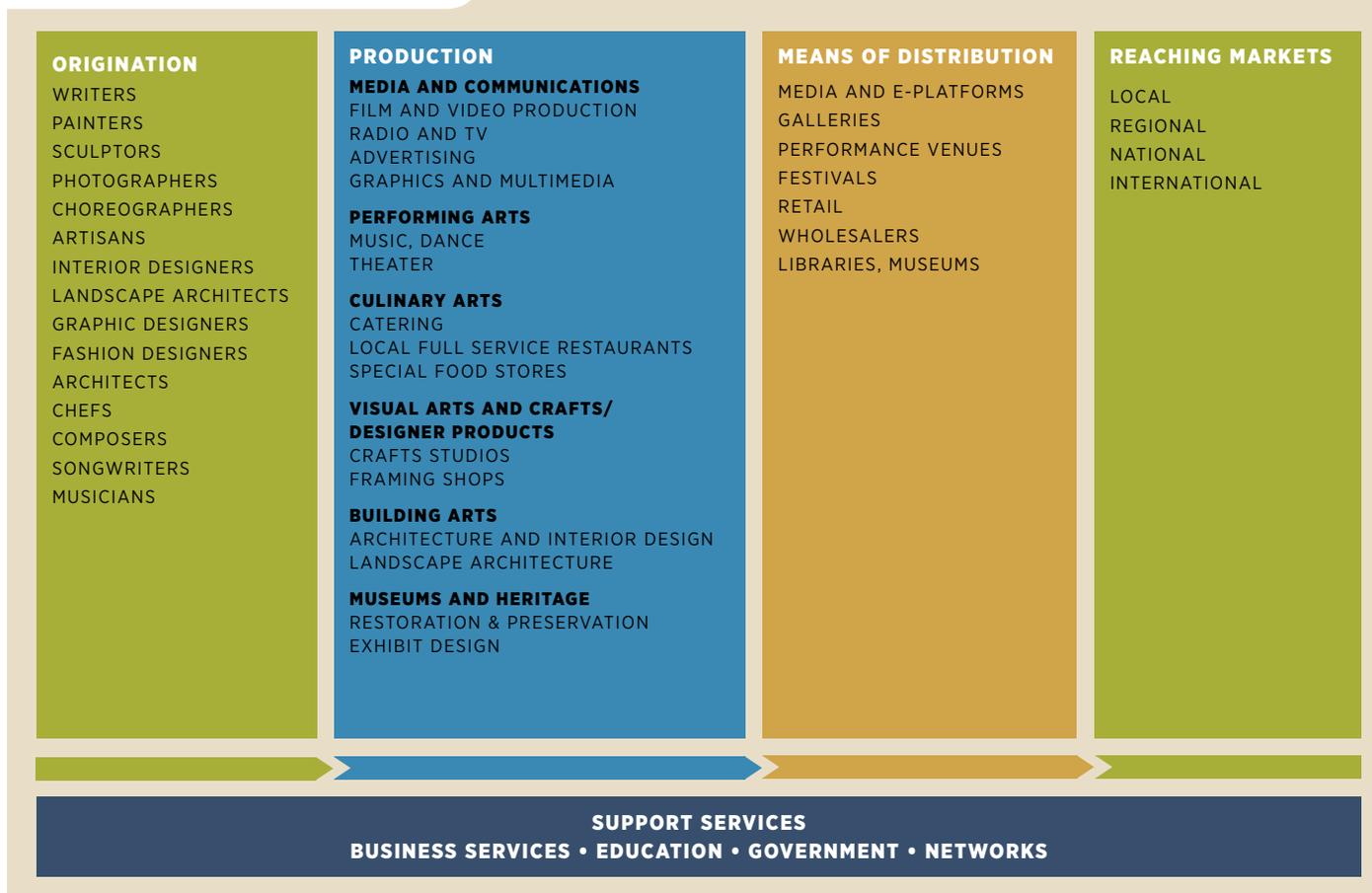
DEFINING THE CREATIVE SECTOR

The concepts of the *creative economy*, *creative class*, and *creative sector* have made their way into common usage in recent years, yet there is no clear consensus on what these terms mean. The word *creative* itself is a moving target, expanding and contracting to fit the goals and missions of its users. To some, it describes any economic activity that involves imagination or originality. To others, the focus is limited to more traditional arts and cultural activities. For many, creative applies to the environment, referring to a place that appeals to the so-called creative class: the broadly defined “knowledge workers” whom many cities are trying to attract.

The *Creative DC Action Agenda* views the creative sector through the same analytical lens applied to other sectors such as technology, manufacturing, or healthcare. The focus is on jobs and economic opportunities associated with the development of industries that serve as economic engines for a regional economy. Accordingly, the specific definition of the **creative sector** used for this analysis is:

Enterprises in which creative content is central to both the cultural and economic values of what they produce. These include businesses, individuals, and organizations involved at every stage of the creative process, including conception, production, and initial presentation of the product.

FIGURE 1: The Creative Sector Value Chain



The **creative economy** is even more comprehensive than the creative sector, since it includes creative talent and creative neighborhoods that together contribute to making a community a more vital and competitive place. The creative sector operates as an economic production system with value chains that extend from the raw materials, equipment, and sources of learning through the support systems, distribution channels, and marketing outlets. (See Figure 1.)

Every creative industry starts with the originators: the playwright, composer, artist, chef, and designer. At the next stage of production, creativity is converted into consumer goods through publishers and printers; film, video, and music production companies; advertisers; and manufacturers. Finally, creative products reach the public through media companies distributing film and video through multiple venues; galleries selling art; and museums and libraries providing access for cultural products to the public.

Although the creative sector essentially incorporates the same general industries in all communities, it does differ from one local economy to another based on the specific conditions, economic relationships, and historic culture of different places. As such, interviews and focus groups held with hundreds of individuals in the Washington, DC creative community helped provide a deeper understanding of the specific strengths and relationships within the creative sector in the District. Based upon this input and an initial analysis of the economic data, the creative activities in the city were further grouped into the following six creative segments:⁵

- **MUSEUMS AND HERITAGE** includes the museums, libraries, and historical assets in the city's neighborhoods, including federal institutions such as the Smithsonian, the National Archives, and the Library of Congress.
- **BUILDING ARTS** comprises those companies that apply creative content to the city's built environment and includes architecture, landscape architecture, and interior design.
- **CULINARY ARTS** is the subset of the food preparation industry that includes all cooking-related activities in which aesthetics and creative content are critical elements. The segment includes only locally-owned food establishments, full-service restaurants, gourmet food shops, and caterers.
- **PERFORMING ARTS** comprises theater, music, dance, and spoken word and the performers, promoters, producers, directors, and technicians needed to bring the performing arts to the public.
- **MEDIA AND COMMUNICATIONS** covers traditional media (books, journals, newspapers, radio, television, and film) and new media, as well as the graphic and multimedia designers that service this industry and the advertising and public relations firms that communicate ideas for distribution to the media.
- **VISUAL ARTS AND CRAFTS/DESIGNER PRODUCTS** is the segment most often associated with the creative economy—the painters, photographers, sculptors, potters, glassblowers, metal artists, jewelers, fashion designers, and other artisans who create products and the galleries and venues that display and sell them.

In the next section, the Action Agenda first looks to measure the direct employment and wages associated with the creative sector in Washington, DC and then considers more broadly the multiple dimensions of the creative economy and how each contributes to the District's vitality.

DIRECT EMPLOYMENT IN THE CREATIVE SECTOR IN WASHINGTON, DC

Past studies have sought to quantify the economic importance of cities' arts and cultural activities by applying complex economic impact models that focused primarily on nonprofit arts and cultural institutions and tried to estimate the amount of money that residents and tourists spent visiting these institutions. In contrast, the methodology that informs this analysis captures data on the direct jobs associated with the production of

goods and services in particular industries while omitting multiplier, or secondary, impacts. As such, it provides a relatively (and intentionally) conservative measure of the direct employment associated with enterprises and workers engaged in creative, content-related industries.

To fully understand the economic importance of the District’s creative sector, one must consider the scale and scope of two critical and overlapping components—creative enterprises and the creative workforce. (See Figure 2.)

The analysis of direct employment includes all of the jobs associated with employers in that sector, from clerical and management jobs to more specialized technical jobs. For example, a measure of total employment includes the clerical staff at an architecture firm (non-creative workers in a creative enterprise) as well as the architects (creative workers in a creative enterprise). By this methodology, enterprises in the creative sector in Washington, DC account for a total of 75,352 direct jobs. (See Figure 2.)

But enterprises are just one part of the picture. Thousands of creative workers are employed in other sectors of the economy that might not be classified as creative: an architect could work for a construction company or teach architecture at a university (neither of which are considered to be in the creative sector). Among the workers in the District who use their creative talents in other sectors of the economy are artists working as teachers, musicians who find employment in the city’s religious institutions, and graphic designers who work for the many associations that are headquartered in the city. All told, there are 15,016 additional creative sector jobs in Washington that involve creative talent working outside of creative enterprises. (See Figure 2.)

Thus, counting both employment in creative enterprises and employment related to creative workers employed outside of the creative sector yields a total of 90,368 direct jobs in Washington, DC’s creative sector.

Creative Enterprises

The city’s creative enterprises include nonprofit cultural institutions, commercial businesses that produce and

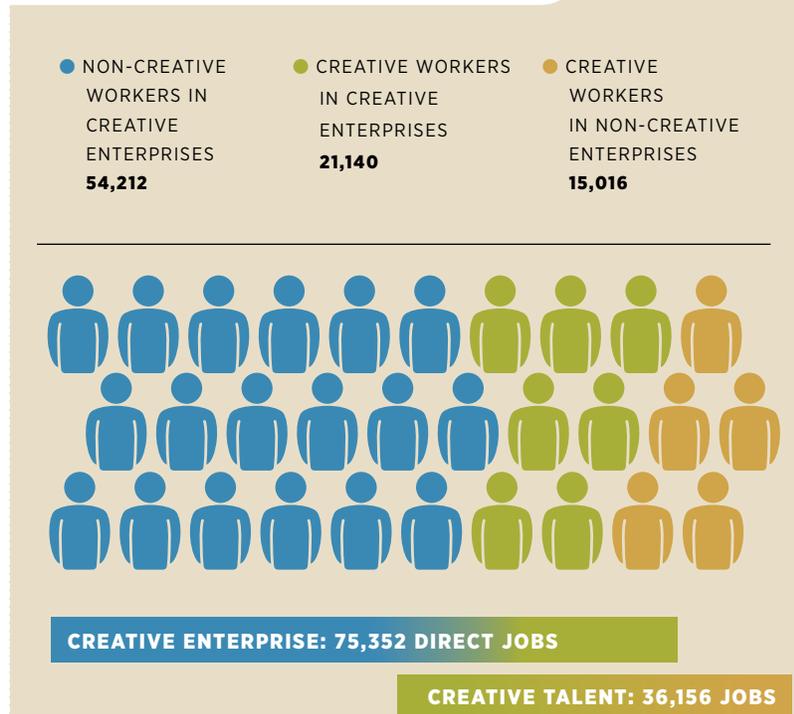
Thousands of creative workers are employed in other sectors of the economy that might not be classified as creative.

distribute creative products, and the thousands of self-employed individuals, each of whom is, in effect, an entrepreneur seeking to produce and successfully market his or her product to the consumer.

IMPORTANCE TO THE WASHINGTON, DC ECONOMY

Employment in the creative sector in the District accounts for a sizable share of the city’s overall employment. As noted above, a conservative estimate of direct creative sector employment is 75,352, or about 10 percent of the total jobs in the District.

FIGURE 2: The Big Picture—A Total of 90,368 Jobs



Source: EMSI, 2007 US Department of Labor Statistics, Quarterly Census of Employment and Wages, 2006 US Census Nonemployer Statistics

Although DC's creative sector provides so many jobs, this sector has not been fully recognized as an important component of the city's economy. This is due in part to traditional economic studies missing two important components of the economic activity in the creative sector: the large number of self-employed individuals and those employed in government-related creative activity, a particularly important part of the creative sector in Washington, DC given the federal presence. (See Chart 1.)

Self-employed individuals in Washington, DC's creative economy—the musician who teaches students, plays in one or more musical groups, and accompanies a local church choir, or the writer who earns her living through multiple freelance assignments—generate significant total income. According to the *Nonemployer Statistics* published by the U.S. Census Bureau, in Washington, DC, in 2006, close to 7,000 enterprises were operated by sole proprietors who were essentially self-employed. These individuals earned a total of \$237 million in 2006 through their creative activities.

Previous studies of the economy in the District have also missed the large number of creative jobs embedded in the federal government. A conservative estimate is that

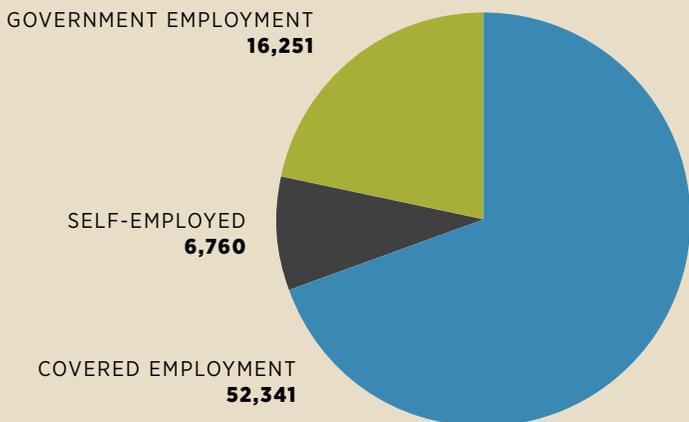
CREATIVE ENTERPRISES

- ▶ 75,352 DIRECT JOBS
- ▶ 10,250 ESTABLISHMENTS
- ▶ \$5 BILLION IN ANNUAL EARNINGS
- ▶ 10% OF TOTAL EMPLOYMENT

there are 16,251 federal government jobs in Washington directly related to creative industries. (See Table 1.) This includes workers employed at the Smithsonian Institution, the National Archives, the Library of Congress, the Kennedy Center for the Performing Arts, the Government Printing Office, and other institutions that involve creative products that are part of the federal government.

Rankings of key industries in Washington, DC usually start with healthcare, membership associations, and technology. More recently, there has been a focus on green jobs. If one looks at nongovernmental, wage and salary employment in the District, the creative industries rank relatively high. For example, the recent study by the DC Office of Planning, in conjunction with the Washington, DC Economic Partnership and the DC Department of Employment Services, *District of Columbia Green Collar Jobs Demand Analysis Final Report*, found a total of 25,167 jobs, and a 2008 study by AeA reported a total of 35,600 technology jobs in the District.⁶ U.S. Department of Labor statistics for 2007 reported a total of 47,660 jobs in membership associations and organizations and 53,303 jobs in healthcare and social assistance. The 52,351 non-governmental, wage and salary jobs in the creative sector exceeds or is comparable to these other industries.

CHART 1: Total Jobs in Creative Enterprises: 75,352



Note: Covered employment includes jobs covered by Unemployment Insurance.
 Source: U.S. Department of Labor, Quarterly Census of Employment and Wages 2007 and U.S. Census Bureau, Nonemployer Statistics 2006.

KEY SEGMENTS OF THE CREATIVE SECTOR

Both in terms of jobs and wages, the most important segment of Washington's creative sector is media and communications. This segment supports nearly half of all creative sector jobs in the city, and pays well over half of the total wages in the creative sector. Museums and heritage is the next most important, accounting for 14 percent of both employment and wages. Building arts

provides only 10 percent of jobs, but 12 percent of wages, while the culinary arts segment of the creative economy supports nearly 25 percent of employment within the sector, but pays only 9 percent of the wages. (See Table 2.)

Self-employed individuals dominate the more traditional cultural sectors of visual arts and performing arts. As one might expect, freelancers and sole proprietors are most

prevalent in the more traditional arts and cultural segments of the creative economy. Many individual musicians, visual artists, actors, and craftspeople make their living by piecing together a variety of freelancing assignments. Some may be teaching their art and thus be classified not as artists, but as teachers. Moreover, a portion of the income associated with their work likely is not fully reported. In

TABLE 1: Federal Government Employment in Creative Sector in Washington, DC

INDUSTRY	GOVERNMENT EMPLOYMENT
MUSEUMS, HISTORICAL SITES, ZOOS, AND PARKS	5,149
LIBRARIES AND ARCHIVES	3,914
PRINTING AND RELATED SUPPORT ACTIVITIES	3,538
ARCHITECTURAL SERVICES	2,071
PERFORMING ARTS COMPANIES	1,108
FULL-SERVICE RESTAURANTS	393
NEWSPAPER PUBLISHERS	78
TOTAL	16,251

Source: U.S. Department of Labor, Quarterly Census of Employment and Wages, Average Annual 2007

TABLE 2: Employment in the Creative Sector by Major Segments

CREATIVE SEGMENT	JOBS		WAGES	
	EMPLOYMENT	PERCENTAGE	WAGES ('000'S)	PERCENTAGE
CULINARY ARTS	18,125	24.1%	\$468,509	9.2%
BUILDING ARTS	7,566	10.0%	\$610,503	12.0%
MEDIA AND COMMUNICATIONS	32,132	42.6%	\$3,045,668	59.8%
MUSEUMS AND HERITAGE	10,454	13.9%	\$718,889	14.1%
VISUAL ARTS	2,116	2.8%	\$73,952	1.5%
PERFORMING ARTS	4,959	6.6%	\$172,513	3.4%
TOTAL CREATIVE	75,352	100%	\$5,090,034	100%

Source: U.S. Department of Labor, Quarterly Census of Employment and Wages, Average Annual 2007; U.S. Census *Nonemployer* Statistics, 2006; and EMSI



MARISA GAITHER FLOWERS, GREEN DOOR ADVISORS, LLC, 2009

In the visual arts segment, self-employed individuals hold well over half of the measured jobs, and there is a high likelihood that official statistics substantially undercount employment and wages in these segments.

the visual arts segment, self-employed individuals hold well over half of the measured jobs, and there is a high likelihood that official statistics substantially undercount employment and wages in these segments. In performing arts, close to a third are self-employed.

One distinctive factor about the creative sector in Washington, DC is the considerable overlap between segments within it, a reality that complicates categorization but also helps catalyze additional economic activity. For example, National Geographic has a museum, Explorers Hall, but is also part of the media industry (its magazine and cable channel); the Building Museum is part of both the museum/heritage and building arts segments; caterers within the culinary arts segment may provide a large percentage of their services to the museums and performing arts segments; many of the city’s art centers have both galleries for visual artists as well as venues for the performing arts; and a close

connection clearly exists between the activities of the city’s multiple art museums and the artists and galleries in the visual arts segment.

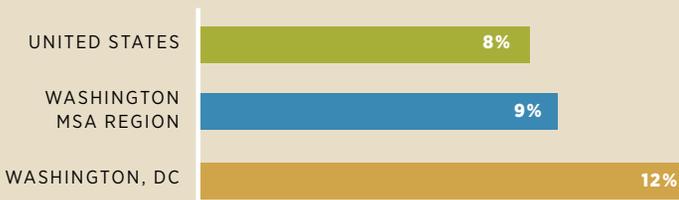
Concentration of Employment Relative to the Greater Washington, DC Region and the U.S.

Jobs in creative enterprises make up a larger component of the District’s economic base than is true in the larger Washington Metropolitan Statistical (MSA) region.⁷ Specifically, the proportion of jobs in the creative sector is higher in Washington, DC than in both the Washington MSA and the country as a whole. Since comparable statistics on government creative jobs are not available for the Washington MSA region, the comparison only includes non-governmental employment. As Chart 2 illustrates, in Washington, DC, creative sector jobs account for close to 12 percent of all non-governmental employment, compared to 9 percent in the region and 8 percent in the U.S. overall.

In general, the District has a disproportionately large share of all creative sector employment in the Washington MSA region. While Washington, DC only accounts for about 17 percent of all of the jobs in the Washington MSA, about 27 percent of the non-governmental creative jobs are located within the District. In some segments of the creative economy, the city is clearly the location of choice for creative companies. (See Chart 3.)

While it is not surprising that a large share of the

CHART 2: Private Creative Employment as Percentage of Total Private Employment



Source: U.S. Department of Labor, Census of Employment and Wages, Average 2007

region's jobs in museums and heritage is located in Washington, the city also has a very high proportion of the jobs in media and building arts, with 33 percent of all media and communications positions and 37 percent of building arts jobs. Only in visual arts and performing arts, where space and cost considerations provide a strong motivation for firms to locate outside the District proper, does the city account for a smaller share of regional jobs.

Employment in many of DC's creative segments is also extremely high relative to the U.S. as a whole. Every creative segment in DC has a location quotient—the ratio of employment within a specific occupation in Washington, DC over the same measure in the entire United States—above 1.0, meaning that the percentage of total employment in that segment in the District is higher than in the U.S. overall. The building arts segment is particularly large in relative terms, with nearly three-and-a-half times as much employment on a percentage basis. In addition, both the media and the museums and heritage segments (even without including the 5,000 federal museum jobs), have over two times the proportion of employment than does the U.S. overall. (See Chart 4.)

CREATIVE SECTOR EMPLOYMENT GROWTH

Prior to the current economic downturn, employment in the creative sector in the District grew at a faster rate than in the Washington MSA or the U.S. as a whole.

In the five-year period between 2002 and 2007, the city added 4,200 new jobs in creative enterprises with employees, as well as about 1,200 jobs in sole-proprietorships. During this period, in terms of percentage growth, employment among the city's self-employed has exceeded growth in traditional wage employment, with the number of self-employed creative individuals increasing by over 25 percent. As Chart 5 shows, overall creative sector employment growth in the District compared favorably to both regional and national job growth rates.

The six segments of the creative sector in the District fared very differently in the years before the current recession. Between 2002 and 2007, the building arts

The proportion of jobs in the creative sector is higher in Washington, DC than in both the Washington MSA and the country as a whole.

CHART 3: District Creative Employment as Percent of the MSA

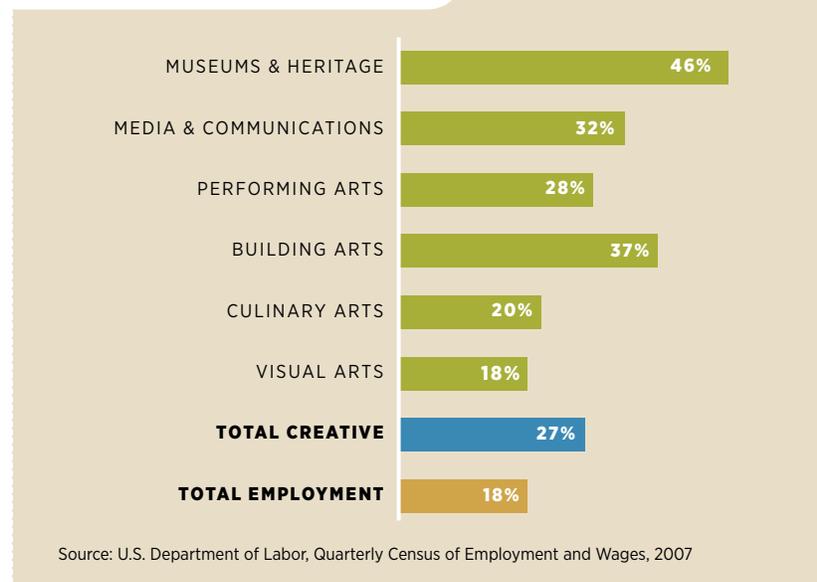
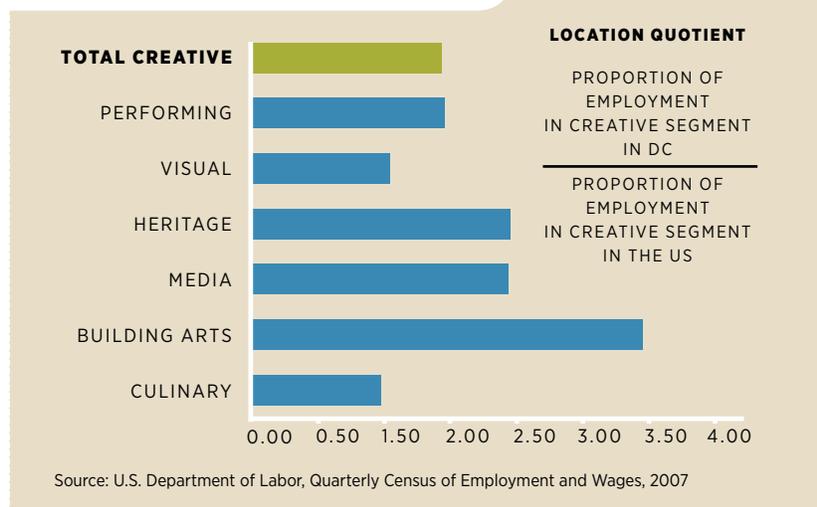


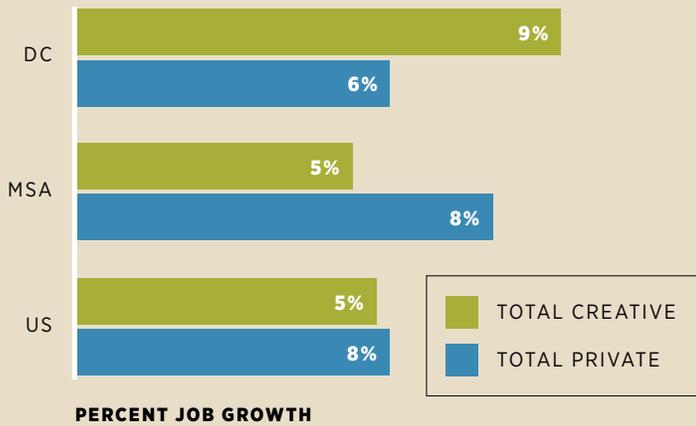
CHART 4: Concentration of Employment by Creative Segment in DC Compared to the US



and culinary segments experienced the most rapid growth of the segments studied. During this period, architectural services added close to 1,000 jobs in Washington, DC. Culinary jobs also grew rapidly, with an additional 3,900 jobs in full-service restaurants

in the District.⁸ On the other hand, the District saw a decline in the media and communications segment, with significant job losses in publishing, software, television broadcasting, film, and printing. The losses in these industries are due to larger national trends and restructuring. On a percentage basis, job losses in this segment in Washington, DC were lower than those in the region or nationwide. (See Chart 6.)

CHART 5: Creative Sector Employment Growth 2002–2007



Source: EMSI Covered Employment, U.S. Census: *Nonemployer* Statistics 2006; and US Bureau of Labor Statistics, Quarterly Census of Employment and Wages

The Creative Workforce

Washington, DC is rich in creative talent. Overall, Washington, DC has more than 36,000 jobs in 39 creative occupations in both creative and non-creative industries. In addition to the thousands of creative individuals who work within the creative sector, the District has 15,000 individuals who are in creative occupations, but employed outside of the creative sector. (See Appendix 2 for a full list of creative occupations.)

CONCENTRATION OF CREATIVE TALENT

The concentration of creative talent within selected

CHART 6: Growth Trends By Segment 2002–2007



Source: EMSI Covered Employment, and US Bureau of Labor Statistics, Quarterly Census of Employment and Wages, 2007

Overall, Washington, DC has more than 36,000 jobs in 39 creative occupations in both creative and non-creative industries.

creative occupations in Washington is significant when compared to the U.S., as well as to other cities. In relative terms, the city’s creative talent pool is especially strong within particular creative occupations. The occupational location quotient is particularly high for creative occupations related to museums and libraries (museum technicians and archivists) as well as occupations related to the media segment (writers, public relations, media and communication workers, radio operators,

CREATIVE WORKFORCE

- ▶ 36,156 WORKERS COMPRISED OF:
 - 15, 000 WORKERS OUTSIDE CREATIVE ENTERPRISES
 - 21, 140 WORKERS IN CREATIVE ENTERPRISES
- ▶ \$33.75 AVERAGE WAGE
- ▶ 2.89 LOCATION QUOTIENT

camera operators, and technicians). (See Table 3.) While this occupational data is based on place of work, comparative data that looks at the occupations of residents based on the 2000 Census also provide evidence of a very deep talent pool in the city and the Washington MSA. A study by economist Ann Markusen⁹ of artistic concentration in the top 29 U.S. metro areas ranked the Washington, DC region fourth, trailing only

TABLE 3: Top Creative Occupations in DC by Relative Concentration

OCCUPATION	2007 MEDIAN HOURLY EARNINGS	2007 LOCATION QUOTIENT
ARTISTS AND RELATED WORKERS, ALL OTHER	\$36.93	18.42
MUSEUM TECHNICIANS AND CONSERVATORS	\$26.05	9.54
WRITERS AND AUTHORS	\$32.14	8.67
PUBLIC RELATIONS SPECIALISTS	\$39.85	7.37
MEDIA AND COMMUNICATION EQUIPMENT WORKERS	\$41.36	6.98
RADIO OPERATORS	\$46.06	5.51
ARCHIVISTS	\$33.93	5.25
REPORTERS AND CORRESPONDENTS	\$32.22	5.13
EDITORS	\$29.60	5.06
BROADCAST NEWS ANALYSTS	\$35.35	4.78
BROADCAST TECHNICIANS	\$25.15	4.36
SET AND EXHIBIT DESIGNERS	\$27.11	3.49
PRODUCERS AND DIRECTORS	\$36.09	3.16
CAMERA OPERATORS, TV, VIDEO, AND MOTION PICTURE	\$31.97	3.00
MUSICIANS AND SINGERS	\$17.41	2.83
TECHNICAL WRITERS	\$30.20	2.70
AVERAGE ALL CREATIVE OCCUPATIONS IN DC	\$33.73	2.89

Source: EMSI Occupational Report

Los Angeles, New York, and San Francisco in terms of concentration of artistic talent. The study found that the region ranked particularly high in concentration of performing artists, authors, and architects.

EMPLOYMENT OPPORTUNITIES

While there are plenty of “starving artists,” and the average wages of creative occupations such as actors, visual artists, and musicians remain relatively low, wages for jobs in creative occupations are actually higher than the overall average wage in Washington, DC (\$33.73 per hour for creative occupations vs. \$31.30 for DC overall¹⁰). In addition, while many creative occupations call for a bachelor’s degree or above, others require only on-the-job training or postsecondary vocational degrees—though, for the most part, the better paying jobs are those that require higher educational attainment. (See Table 4.)

BEYOND THE DIRECT JOBS

The high level of direct employment generated through creative enterprises in Washington provides the basis for continued substantial public sector attention and private sector investment. But the economic benefits of investments in Washington, DC’s creative economy go well beyond the number of direct jobs. (See Figure 3.)

Attracting Visitors

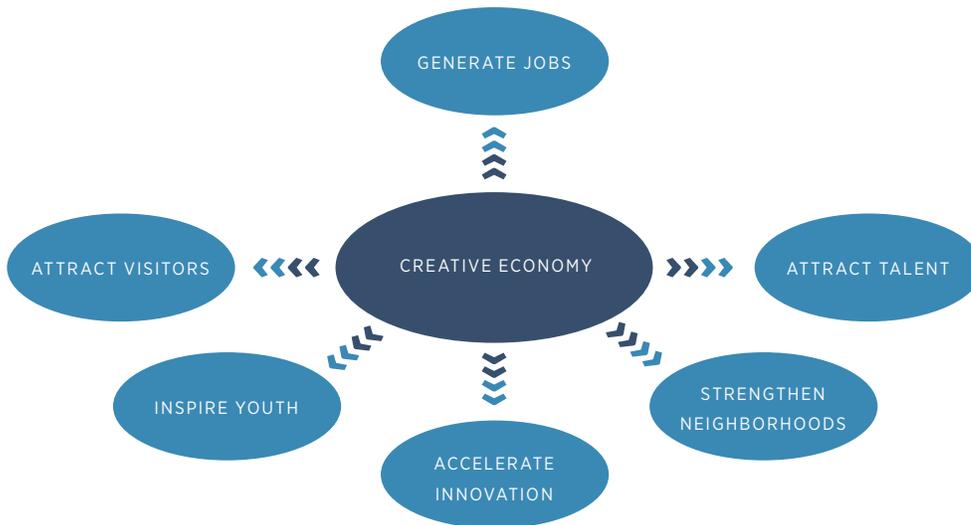
The city’s creative industries are a key part of the tourism “product” of Washington, DC. The economic analysis of the creative sector has considered only the direct employment associated with creative workers and creative enterprises. But the creative talent in the city and its creative enterprises also add to the competitiveness of

TABLE 4: Creative Occupations Not Requiring Bachelor’s Degree

OCCUPATION	EDUCATIONAL REQUIREMENTS
LIBRARY TECHNICIAN	POSTSECONDARY VOCATIONAL
AUDIO-VISUAL COLLECTIONS SPECIALISTS	MODERATE-TERM ON-THE-JOB TRAINING
CRAFTS ARTIST	LONG-TERM ON-THE-JOB TRAINING
FINE ARTIST	LONG-TERM ON-THE-JOB TRAINING
FASHION DESIGNER	ASSOCIATES DEGREE
INTERIOR DESIGNER	ASSOCIATES DEGREE
MERCHANDISE DISPLAYER	MODERATE-TERM ON-THE-JOB TRAINING
ACTOR	LONG-TERM ON-THE-JOB TRAINING
DANCER	LONG-TERM ON-THE-JOB TRAINING
MUSICIAN	LONG-TERM ON-THE-JOB TRAINING
RADIO ANNOUNCER	LONG-TERM ON-THE-JOB TRAINING
MEDIA AND COMMUNICATIONS WORKER	LONG-TERM ON-THE-JOB TRAINING
AUDIO AND VIDEO EQUIPMENT TECHNICIAN	LONG-TERM ON-THE-JOB TRAINING
BROADCAST TECHNICIAN	ASSOCIATES DEGREE
RADIO OPERATOR	MODERATE-TERM ON-THE-JOB TRAINING
SOUND ENGINEERING TECHNICIANS	POSTSECONDARY VOCATIONAL
CAMERA OPERATORS	MODERATE-TERM ON-THE-JOB TRAINING

Source: EMSI Occupational Report
 Note: Educational requirements are not specific to DC.

Figure 3: Beyond the Direct Jobs—The Broader Economic Benefits of the Creative Economy



other sectors of the Washington, DC economy. The most obvious example is the city’s hospitality industry, which caters to tourists and other leisure travelers, business travelers, and convention attendees. The most recent report on Washington, DC’s travel and tourism industry found that 16.6 million visitors came to the city in 2008, spending \$5.6 billion and generating \$618 million in local tax revenue.¹¹ While many visitors still focus their attentions “on the Mall,” DC’s arts and cultural offerings, from theaters and music to galleries and neighborhood restaurants, offer another compelling draw and are clearly part of the tourism product marketed by the District. Another study by the advocacy organization Americans for the Arts found that in 2005 over 5 million visitors from outside the Washington MSA attended an arts and cultural event in the region, spending a total of \$431 million.¹²

ATTRACTING TALENT

As the national and global labor markets continue to shift, the economic competitiveness of a city is increasingly related to its ability to attract highly educated individuals. A growing number of these “knowledge workers” make decisions about where to live based on their values, desired amenities, and community sensibilities, and

then look for work in their location of choice. For that very reason, companies that depend on an educated and talented labor pool increasingly choose those same locations.

In its report, *The Young and Restless in a Knowledge Economy*, CEOs for Cities noted, “It is difficult to overstate the impact that the college-educated 25 to 34 year-olds we call the Young and Restless will have on a city’s future prosperity. They are well-educated, adaptable, mobile and relatively inexpensive, comprising an important part of the so-called creative class. With rising demand for their skills and with competition for them now on a global scale, cities must be magnets for these highly-coveted workers or they will fail, because in the knowledge economy, it is the creativity and talent inherent in a city’s workforce that will shape its economic opportunities”¹³ Economic development experts recognize the increased attention to amenities, or quality of place, by this mobile cohort and, therefore, have been more willing to invest in arts and culture as part of the attraction package.

Washington’s diverse, vibrant, and growing creative sector adds powerfully to its locational appeal to these high-value workers. While specific data that ties the locational decisions of the city’s residents to its creative assets are not available, interviews and focus groups



MARISA GAITHER FLOWERS, GREEN DOOR ADVISORS, LLC, 2009

revealed the growing appeal of DC as a location of choice for highly educated and creative individuals. The word is out that the District has an economy beyond the federal government and now has a growing arts scene. In July 2009, United Van Lines reported that Washington, DC was the nation's most popular migration destination.¹⁴ The new administration and the interest generated in Washington, DC resulting from this change is clearly part of the reason. But, the District is also becoming a location of choice for college graduates looking for a vibrant urban experience. Further strengthening the creative sector in the city and region would reinforce a virtuous cycle in this regard.

REVITALIZING NEIGHBORHOODS

Globally, there is growing evidence of the vital role that arts and culture can play in helping to revitalize urban centers and city neighborhoods. In fact, many cities have aggressively sought to attract artists as a catalyst to revitalizing urban neighborhoods.

A walk through Washington's neighborhoods shows how powerfully the arts can influence quality of life. From the revitalization of the 14th and U street corridor, to Downtown DC where a burgeoning theater district with seven different performing arts venues have created a vibrant retail and housing market, to the emerging activity on H Street, home to the Atlas Performing Arts Center and H Street Playhouse as well as new music and arts venues, Washington's artists and cultural assets have played a significant role in strengthening the city as a place to live, work, learn, and

Washington's artists and cultural assets have played a significant role in strengthening the city as a place to live, work, learn, and shop.

shop. Retailers throughout the city also recognize that culinary arts, art galleries, and performing arts venues are important assets in helping to increase economic activity and revenues in the city's key shopping districts. The challenge here is to recognize that the forces created through arts and cultural activities are actually so strong that parallel efforts must be made to ensure that low-income neighborhood residents also benefit from the resulting economic changes.

INSPIRING THE CITY'S YOUTH

There is a considerable body of research on the role of the arts in student achievement. A 2002 research study, *Critical Links*, summarized a wide range of studies on the connection between the arts and academic achievement and social development. This research provided evidence that the arts had a positive impact on student achievement in terms of academic skills, general thinking skills, social skills, and motivation to learn.¹⁵

Evidence of the role of the creative sector in inspiring youth in the District, however, is largely anecdotal. Within the District, youth engage with the arts through their schools and through specialized after-school and summer programs. The DC Arts and Humanities Education Collaborative makes critical connections between the District's diverse cultural institutions and its schools, providing programming for more than 200,000 DC students since 1988. According to an evaluation of the Collaborative's Pilot School Program, teachers involved reported that "students improved their learning in various

academic subjects, had improved retention, expressible skills, self-confidence, and better relationships with other students.”¹⁶

A visit to the city’s Duke Ellington High School, the Multi-Media Training Institute, or the classes offered at the National Building Museum shows the benefits that creative activity can yield for young people. According to the Duke Ellington High School, while the demographic characteristics of the students entering the school are representative of the District, about 99 percent of its students graduate from high school and 95 percent go on to postsecondary education, and the school has the lowest truancy rate in the city. Arts participation in the classroom, after school, and over the summer has not only provided thousands of young people in the District with pathways to creative careers, but, just as important, has also inspired students to stay in school and become more deeply committed to learning.

ACCELERATING INNOVATION AND ENTREPRENEURIAL DEVELOPMENT

The considerable creative and design talent in Washington has also helped to promote innovation throughout the city’s economy. The city’s architects and interior designers have enhanced the character of hotels and retail establishments in the region, and the significant creative talent in the city has become an important element in supporting technology companies. For example, the city’s many design studios help their clients to build an Internet presence and utilize new social networking tools in order to increase their markets. One need only look at the portfolio of LaunchBox Digital, a DC-based early-stage investment firm, to understand the entrepreneurial power of the creative sector and the critical role that creative talent is playing in the technology companies that are growing in the District. Many of these start-up companies are involved in media, design, and communications, all key industries in the creative economy.



Segment Profiles

The creative economy in the District of Columbia can be broken into six distinct segments:

- **MUSEUMS AND HERITAGE**
- **BUILDING ARTS**
- **CULINARY ARTS**
- **PERFORMING ARTS**
- **MEDIA AND COMMUNICATIONS**
- **VISUAL ARTS AND CRAFTS/DESIGNER PRODUCTS**

This section provides a description of each segment, a discussion of the most common occupations, and the District's training and education resources, and challenges and opportunities.

MUSEUMS AND HERITAGE

In 2007, Washington could boast of having the top three entries (the Smithsonian Natural History and Air and Space Museums, and the National Gallery of Art) in Forbes Traveler's ranking of the 25 most visited museums in the U.S. Three other DC museums also made the list. But while visitors clearly are aware of the Smithsonian and other sites on the National Mall, many of the city's museums, as well as its extensive historic resources, public monuments, African-American cultural sites, and historic neighborhoods, are unfamiliar to tourists. In total, there are approximately 90 museums in the city and over 96 sites listed on the Historic Register.

Museums and heritage resources are the District's biggest draw in attracting tourists and convention-goers and their operations have a significant impact on the city's economic health: the millions of visitors who come to DC contribute over \$5.5 billion to the city's economy, including \$620 million in tax revenues for the District of Columbia. Additionally, enterprises in this segment of the creative sector directly employ 10,454 individuals.¹⁷

MUSEUMS AND HERITAGE

▶ TOTAL JOBS DC 2007	10,454
▶ PERCENTAGE OF GROWTH 2002-2007	10%
▶ LOCATION QUOTIENT	2.3
▶ PERCENTAGE OF TOTAL CREATIVE JOBS	14%
▶ AVERAGE WAGE	\$68,767

Another measure of the economic importance of museums and heritage sites is their own spending, amounting to well over \$750 million annually.¹⁸ These expenditures represent an additional economic impact, with much of it used to *procure goods and services* in the Washington area. For example, many of the museums outsource food services and security, providing hundreds of additional jobs beyond those on the payroll. The District also is home to a number of specialized businesses that serve the needs of the museum sector, including companies that specialize in art storage, transportation, art handling, exhibit design, and conservation and preservation.

Museums, libraries, and archives offer a wide range of occupations, from low-skilled, entry-level jobs, such as attendant, to positions that require Ph.D.s. The area has a significantly higher concentration of highly-skilled technical occupations than is present in the country as a whole with archivists, museum technicians, exhibit designers, and librarians especially prevalent. Given the significant level of conservation and preservation activities at the Smithsonian, Library of Congress (through its American Folklife Center), and the National Archives, there is an extremely high concentration of skilled conservation and preservation professionals.

In terms of a talent pipeline, Washington has a number of specialized training programs for individuals interested



in jobs in this segment. One of the most unusual and vital resources in this respect is the Museum Studies Department of the Duke Ellington School of the Arts, which may be the only high school program in museum studies in the U.S. With top-notch art history programs offered by colleges and universities in the area, as well as degree programs related to museum and heritage specialties, education and training options in the museum field are plentiful. Fewer in number are programs that train and place workers to fill some of the less skilled positions in the museums and heritage segment.

Challenges and Opportunities

THE MUSEUMS AND HERITAGE SITES LOCATED “OFF THE MALL” ARE NOT AS VISIBLE AND WELL KNOWN AS THE PRIMARY TOURISM-RELATED ATTRACTIONS. Many visitors remain within the main tourist areas and do not experience the variety of cultural destinations located in neighborhoods. There is only one citywide visitor center¹⁹; hotel concierges do not have extensive information available about the museums outside of the major attractions; and a perception lingers that going beyond the main tourist areas might be unsafe.

THE MUSEUMS IN THE DISTRICT DO NOT HAVE A STRONG NETWORK OR COLLABORATIVE ENVIRONMENT. While cooperation among the museums and between the museums and other cultural institutions is not unknown, the level of collaboration is not as strong as it could be. The absence of a strong convening and advocacy presence within the segment has entailed missed

.....
Many visitors remain within the main tourist areas and do not experience the variety of cultural destinations located in neighborhoods.

opportunities in terms of market development, education, shared facilities, and other potential cost savings. A related issue—and a possible explanation for the lack of a strong and clear “voice” for the segment—is that the non-Smithsonian museums and historic sites suffer to some degree from competition with the Smithsonian, which is free to the public. A collaborative marketing initiative among the museums and historic sites could add needed scale to current audience development efforts.

THERE ARE FEW COLLABORATIVE WORKFORCE DEVELOPMENT PARTNERSHIPS THAT PROVIDE TRAINING FOR MUSEUM WORKERS.

While a number of jobs in the museum sector require advanced degrees, many jobs involve more technical skills or customer service-related skills and could provide entry-level employment for disadvantaged Washingtonians. A workforce program that offered a pipeline into the industry along with general customer service training could provide the museum sector with a higher quality workforce and residents of the city with access to career pathways in the museums.

ATTRACTING NEW PRIVATE AND SPECIALIZED NONPROFIT MUSEUMS IS AN AREA OF POTENTIAL OPPORTUNITY.

In the last five years, Washington has “attracted” three new for-profit museums (the Spy Museum, the National Museum of Crime and Punishment, and the Wax Museum) as well as two nonprofit museums (the Newseum and the Marian Koshland Science Museum). There are currently a number of additional museums in the planning phase. The city could consider promoting further development

of museums and target other for-profit museums that are closer to “entertainment.”

BUILDING ARTS

The building arts segment includes architecture, interior design, and landscape architecture. The District is a unique location for the building arts because of the diversity of market opportunities it offers. These include the design and construction needs of the federal government, cultural institutions, nonprofit membership organizations, foreign governments and international agencies, and corporate and residential customers. The segment employed a total of 7,566 workers in 2007, showing a significantly higher concentration than in the nation as a whole. The architectural sub-sector is particularly large in relative terms, with a location quotient of 4.65 compared to the nation.

The District is home to offices of some the nation’s largest architecture and interior design firms as well as large, locally-based companies. While the majority of the workers are employed in architecture, interior design and landscape architecture are critical components within the segment as well: the top 15 architectural firms in the District also offer interior design services.

In addition to firms doing work in the segment, the District is also a center for education, professional development, and policy advocacy in the building arts. The industry’s leading professional organizations are headquartered here, including the American Institute of Architects, the American Society of Landscape Architects, and the American Society of Interior Designers. The National Building Museum is among the nation’s premier venues for exploration of the built environment.

The Washington Design Center is another important resource for the interior design industry. One of 16 such facilities in the nation, the Design Center’s showroom gives interior designers, primarily serving the residential market, convenient access to producers and distributors of high-fashion interior furnishings in a single location.

BUILDING ARTS	
▶ TOTAL JOBS DC 2007	7,566
▶ PERCENTAGE OF GROWTH 2002-2007	27%
▶ LOCATION QUOTIENT	3.4
▶ PERCENTAGE OF TOTAL CREATIVE JOBS	10%
▶ AVERAGE WAGE	\$80,690

Building arts employment in the District tends to be concentrated in professional occupations such as architects, architectural drafters, landscape architects, and interior designers. Computer specialists, graphic designers, and professional writers and editors are also employed, but in much smaller numbers.

District employers report little difficulty hiring professional employees. Washington is viewed as an attractive location for professionals in the building arts because of the large concentration of employers, the strength of the real estate development market, the region’s reputation (borne out in the current downturn) as relatively recession-proof, and the considerable recreational, cultural, and entertainment amenities that draw creative talent. Even so, some employers note that the District is considered a “second tier” location in the building arts relative to cities such as New York, Boston, and San Francisco that are better known as centers for architecture and design.

A number of higher education institutions in the area supply the building arts industries with creative talent: Catholic University, the University of the District of Columbia, Howard University, and the University of Maryland all offer Bachelor’s of Science in Architecture degrees. Several of these schools also feature graduate programs in architecture, and other institutions in the area offer undergraduate and graduate degrees in both interior design and landscape architecture.

At the secondary school level, Phelps Architecture, Construction, and Engineering High School is a specialty public high school in Washington that focuses on preparing students for careers in those three fields.

Program areas in the architecture track include architecture, interior design, and landscape design. Students who graduate from Phelps earn a high school diploma as well as an industry-recognized certificate of completion for their career focus area. Another learning opportunity for high school students in this field is the University of Maryland's Discovering Architecture summer workshop, which confers college credit.

Challenges and Opportunities

MANY INDUSTRY LEADERS VIEW WASHINGTON AS A SECOND-TIER LOCATION FOR ARCHITECTURE AND INTERIOR DESIGN. Many firms report that they recruit much of their top talent from other cities and educational institutions. The District's conservative image, due in large part to the influence of the federal government's presence, lessens its appeal for young architecture and design talent seeking an edgier lifestyle and work environment.

OFFICE SPACE IN VARIOUS DISTRICT NEIGHBORHOODS, WHERE MANY BUILDING ARTS FIRMS WOULD PREFER TO LOCATE, IS LIMITED. Firms locating in the District typically pay a significant premium for space relative to suburban locations. Also, commercial space in Georgetown, a preferred location for architecture firms, is scarce and relatively expensive.

THE REGULATORY FRAMEWORK AND PROCESS OFTEN LIMIT THE REGION'S APPEAL TO CUTTING-EDGE DESIGN FIRMS. Architects report that lengthy building permitting and inspection processes can add significantly to the cost of development projects. This image is exacerbated by the federal government, which is perceived as conservative and traditional in its architectural design standards, limiting the appeal of the region as a whole for cutting-edge design firms and workers.

SMALLER FIRMS OFTEN LACK THE ASSISTANCE THEY NEED TO GROW AND EXPAND. Small and mid-size local firms have difficulty both securing contracts and navigating the

numerous bureaucratic hurdles of the vendor certification process. Providing them help on both fronts could facilitate firms' growth, expanding job opportunities for District residents.

THE GROWING INTEREST IN GREEN BUILDING IS LIKELY TO PROVIDE NEW MARKET OPPORTUNITIES IN THE BUILDING

ARTS. The federal government's increased interest in green building design combined with the District government's new policies and regulations on green building and development should provide architectural and interior design firms with new outlets for their work. The same is true for international markets. With the District's unique position as a venue for foreign missions and international institutions, individual firms and industry groups could step up their efforts to market architectural and design services internationally.

CULINARY ARTS

The culinary arts segment includes activities and enterprises in which the creative element of food production is the key component of its value to customers, such as locally-headquartered specialty food stores, full-service restaurants, food establishments, and caterers. There are approximately 18,000 jobs in this segment of the creative economy. While there are some highly creative, highly-skilled jobs in this segment, much of the employment is in lower-skilled positions. As a result, while this segment accounts for about 24 percent of the jobs in the creative sector, it only accounts for 9 percent of the total creative sector wages.

Several defining characteristics make the culinary arts industry a key component of the city's creative economy: its international and ethnic influences, its appeal to up-and-coming chefs, and a burgeoning catering industry serving the many public and private functions of government actors and city residents alike.

According to some restaurant critics, the District's international connections and population have turned

what was once known as a “steakhouse town” into one of the most diverse restaurant landscapes in the country. The District’s neighborhoods feature restaurants that specialize in cuisines from around the world. In addition to the international element, many local restaurants are steeped in the culinary traditions connected to southern cuisine and African-American culture, literature, and heritage. Finally, a cadre of new chefs has brought a burst of energy, visibility, and variety to high-end cuisine in the District, furnishing the field with a more distinctive image while raising standards for Washington’s restaurant-going public.

In addition to the restaurants in the District, dozens of caterers have emerged in the last ten years to meet the considerable demand from the embassies, cultural institutions, and national political organizations in and around the District. These caterers cover the ethnic and cultural landscape and provide employment for hundreds of city residents. There has also been considerable growth in small specialty food producers, with an emphasis on local farm products.

Although the short-term outlook for culinary arts in Washington is somewhat tempered by the economic recession, the industry remains in a strong position. Even in an economic downturn, restaurant owners and chefs continue to open new establishments, several of which employ between 200 and 300 people. New restaurants are helping revive some District neighborhoods that had been in decline, such as Columbia Heights, Brightwood, U Street, the Benning neighborhood, and H Street. Occupations in the culinary arts industry range from highly-skilled chefs, frontline supervisors, business and administrative staff, event and banquet planners, and salespeople and marketers to lower-skilled waiters, food preparers and handlers, hosts and hostesses, and dishwashers. The local network of education and workforce institutions, while not extensive, makes an important contribution to the industry. Within the DC public schools are several culinary training programs, including the Hospitality High School of DC and the

CULINARY ARTS	
▶ TOTAL JOBS DC 2007	18,125
▶ PERCENTAGE OF GROWTH 2002-2007	25%
▶ LOCATION QUOTIENT	1.1
▶ PERCENTAGE OF TOTAL CREATIVE JOBS	24%
▶ AVERAGE WAGE	\$25,849



VINCENT GALLEGOS / VGDA DESIGN

Chavez School. Roosevelt High School has partnered with the Restaurant Association of Metropolitan Washington’s Education Foundation on a culinary arts program.

Culinary training programs are more prevalent in postsecondary and higher education. One of the strongest training programs in the city is the Job Training Program at DC Central Kitchen, which offers training in self-affirmation and soft skills development along with food preparation and job readiness and placement. In addition, the Art Institute of Washington boasts a strong culinary arts training program, Stratford University has a School of Culinary Arts, and Northern Virginia Community College has an apprenticeship program with the Nation’s Capital Chefs Association. L’Academie de Cuisine in nearby Gaithersburg, Maryland, is one of the best-known programs of its kind, providing professional accredited training as well as instruction for area residents who simply want to improve their cooking skills.

Challenges and Opportunities

THE ECONOMIC CRISIS COULD HAVE A SERIOUS IMPACT ON THE CULINARY INDUSTRY. As one business manager lamented, “The dining-out budget is the first to go.” In

addition, as corporations and businesses find themselves in economic difficulties, catering budgets may suffer.

THE EXISTING CULINARY ARTS TRAINING PROGRAMS IN THE CITY DO NOT MEET THE DEMAND OF THE EMPLOYERS IN THE INDUSTRY.

The relationship between the schools and the industry could be stronger, as employers have some concerns that training programs are not teaching the right skills on the right equipment. Also, the lack of a community college culinary arts training program in the District creates difficulty for residents seeking affordable quality training.

SOME SMALL SPECIALTY FOOD PRODUCERS HAVE INDICATED DIFFICULTY IN FINDING AFFORDABLE AND ACCESSIBLE KITCHEN PREPARATION AND PROCESSING FACILITIES.

If producers had access to affordable facilities with space for manufacturing, storage, and distribution, they could increase production and revenue.

RESTAURANTS COULD CONTINUE TO PLAY A KEY ROLE IN REVITALIZING NEIGHBORHOODS.

The entrepreneurial energy of young enterprising chefs and restaurant owners already has helped turn around a number of District neighborhoods in transition. Effective policies to support restaurants in similar communities could help secure further gains in this regard.

RESTAURANTS COULD HELP PROMOTE OTHER CREATIVE SECTORS.

A number of restaurants in the District exhibit the work of local artists and some of the owners are eager for stronger connections with the arts community. Cultural planners and marketing personnel should include these restaurants in gallery walks as well as look for other ways to strengthen connections between restaurants and the arts. The trend in restaurant-neighborhood revitalization could become even stronger if the restaurants joined in formal partnerships with artists and arts organizations.

THE OPENING OF SO MANY NEW RESTAURANTS IN THE DISTRICT PRESENTS JOB AND CAREER OPPORTUNITIES FOR JOBSEEKERS WITH MODERATE SKILL PREPARATION.

With the proper training and skill development, as well as employment services matching jobseekers to openings, jobs and careers in culinary arts could be attractive employment opportunities.

PERFORMING ARTS

The performing arts industry in the District, which includes theater, dance, music, and spoken word, has blossomed over the last decade with new theaters putting on cutting-edge plays, dance companies that have grown in number and begun to gather critical acclaim, and an eclectic mix of musical styles and genres. The industry is dominated by nonprofit organizations: approximately 113 such organizations in the District generate total income of about \$315 million and have assets, including performance space, worth approximately \$636 million. Collectively, these performing arts organizations spend about \$268 million a year to operate, a significant portion of which is spent in the city.²⁰

Total performing arts employment in 2007 was about 5,000 jobs. Theater is the largest single subcategory in terms of employment, followed by dance and music. Roughly 1,000 theater jobs were government-supported (including those in city- and federally-managed venues), and another 1,400 people were self-employed (typically actors, musicians, directors, and promoters). The industry's largest employers include the Kennedy Center, Arena Stage, Shakespeare Theater, Washington National Opera, Washington Ballet, and Studio Theater.

In terms of theater, the emergence of so many new playwrights has begun to dislodge the long-established view of DC as a somewhat staid and conservative theater town, as has the development of a handful of new venues and the influx of a more demanding and appreciative

audience. This new growth and sophistication has helped catapult the District into the top tier of theater cities in the U.S. In fact, according to statistics from the Helen Hayes Awards, in 2008 there were 8,723 theater performances in Washington seen by a total of 1,997,000 audience members.²¹ With an increase of 14 percent in the number of performances in the Washington area between 2006 and 2008, the Helen Hayes Awards cites Washington as the second most prolific theater community in the country.²²

DC dance companies are among some of the most noted in the U.S. Many reflect the cultures of Africa, South America, Asia, and the Caribbean, while others draw inspiration from the spirit and culture of the city's African-American neighborhoods. On any given night, the range of performances might include ballet, hip-hop, jazz, modern/contemporary, tap, African, Latin, hand, tango, flamenco, salsa, Middle Eastern, folk, Afro-Cuban, and Afro-Brazilian. The dance community enjoys financial support from a number of different resources and organizations.

Over the past century, the District has spawned musical legends in genres from jazz (Duke Ellington, Jelly Roll Morton) and blues (Bo Diddley) to soul (Marvin Gaye), folk (Tim Buckley), and punk (Fugazi), among many others. The music scene is perhaps best known today for originating the genre of go-go, a mix of funk, rap, and heavy percussion that got its start in the 1970s and continues to be played in clubs throughout the city.

A number of key organizations provide financial, organizational, and various kinds of technical support to the performing arts industry. These include the Kennedy Center through its hosting of performances and educational programs; the Washington Performing Arts Society; the Flow Foundation's substantial networking function for many forms of music; the Helen Hayes Awards for Theater; and Dance Metro DC, an affiliate of Dance/USA, an important marketing and advocacy organization for dance in the District.

PERFORMING ARTS

▶ TOTAL JOBS DC 2007	4,959
▶ PERCENTAGE OF GROWTH 2002-2007	5%
▶ LOCATION QUOTIENT	1.7
▶ PERCENTAGE OF TOTAL CREATIVE JOBS	7%
▶ AVERAGE WAGE	\$34,795



Major occupations in the industry include a variety of low-, medium-, and highly-skilled professions—musicians, ushers, lobby attendants, ticket takers, actors, dancers, make-up artists, agents, producers and directors, office clerks, sound and lighting engineers, set designers, and stage managers.

In the DC public schools, the Duke Ellington School of the Arts stands out as an educational and career training institution. It provides intensive pre-professional training in dance, theater, instrumental music, vocal music, and technical theater for students in 9th through 12th grades. In addition to the Ellington School, several charter schools at both the primary and secondary levels focus on the performing arts. Outside of the K-12 public school system, specialized educational programs and organizations play a vital role, including apprenticeship programs at major theater companies and specialized programs in dance and music at private and nonprofit entities such as the Karol Academy of Ballet and the Levine School of Music.

The city's higher educational institutions offer significant resources related to the performing arts. A number of local universities confer advanced degrees in music and theater, and the National Conservatory of

Dramatic Arts and the Studio Theatre Conservatory offer specialized programs. In addition to the education and credentialing they provide, the region's higher education institutions also feature specialized performing groups like the Black Theatre Ensemble at Georgetown, centers like the Shakespeare Globe Center Research Archive at the University of Maryland, and a host of festivals and performances that includes faculty and students.

Challenges and Opportunities

IN SPITE OF THE GROWTH AND EMERGING

SOPHISTICATION OF THE PERFORMING ARTS IN DC, THE CITY STILL LACKS THE IMAGE OF A TOP-TIER LOCATION.

The tendency remains within national performing arts organizations and enterprises to seek talent outside of DC for major productions—an indication that local talent is underappreciated.

THE NETWORKING SYSTEM IN PERFORMING ARTS IS WEAK AND DIVIDED BY GENRE.

No overall coordinating entity exists to elevate this segment, organize it, and take better advantage of the assets. The absence of communication and coordination has made it more difficult to build a large and consistently supportive audience. For instance, efforts to create a regional performing arts calendar have been hampered by a lack of participation from some of the major institutional actors.

LINKAGES BETWEEN THE HIGHER EDUCATION

INSTITUTIONS AND NONPROFIT PERFORMING ARTS

ORGANIZATIONS COULD BE STRONGER. As noted above, considerable higher education resources and programs exist to support performing arts in Washington, DC, but relationships between the universities and the performing arts organizations too often are strained or nonexistent.

WHILE THE CITY HAS SIGNIFICANT CAPACITY IN TERMS OF VENUES, GROWTH IS CONSTRAINED BY SPECIALIZED SPACE NEEDS SUCH AS TEMPORARY HOUSING FOR VISITING ARTISTS, REHEARSAL SPACE, AND STORAGE

SPACE. Guest dancers and actors who come to DC for extended performances face a serious challenge finding affordable housing, as do interns working on a temporary basis with performing arts companies. Many companies also report difficulties finding sufficient space for storage.

MEDIA AND COMMUNICATIONS

Media and communications is by far the largest component of the District's creative economy, representing close to half of all creative employment. More than any other segment, the scale of the media sector is directly related to Washington, DC's unique position as the nation's capital; numerous media organizations operate in the city solely to chronicle and analyze the actions of federal government. The federal government itself also consumes media services such as graphic and website design in order to better communicate with the public. The distinct components of the segment include publishing, video, film, Internet, and broadcasting, as well as communication arts.

Publishing is the single largest component of this segment, accounting for more than a third of all media employment. The industry includes publishers of newspapers, periodicals, books, and software, as well as news syndicates and other information services. Newspapers and periodicals dominate DC publishing. The *Washington Post* is the sixth largest newspaper in the nation in terms of circulation. A unique characteristic of DC is the large number of satellite operations from around the country based in the city to cover national politics: 262 newspapers are represented by corporate bureaus and an additional 32 newspapers, representing 23 different states, have their own bureaus in the District.²³ News syndicates also locate in Washington to cover the events of the Capitol for national and international audiences. In fact, Washington-based news syndicates account for 13 percent of total employment at news syndicates nationally.

Washington is also home to the publishers of magazines that rank at or near the top of their industry

in terms of circulation, such as *National Geographic*, as well as the house publications of trade associations based in the city or region from the American Association of Retired Persons to the National Trust for Historic Preservation. Other organizations outsource publishing functions to turnkey operations such as The Magazine Group, an 80-person publisher headquartered in Washington that produces custom magazines and digital media for more than 70 corporations, associations, and nonprofits. Employment at all periodical publishers in the District is more than six times the national average.

The District also has a very large concentration of jobs in film, multimedia, radio and TV broadcasting, computer game design, and Internet publishing. While relatively small in terms of the number of jobs, the local film industry is growing in terms of recognition and respect. An emerging local specialization in documentaries is spotlighted at SILVERDOCS, an international documentary film festival held annually in nearby Silver Spring, Maryland. DC is arguably becoming the non-fiction media center of the country, with a significant number of production companies and nonprofits that support film and video production.

The District also has an unusually high concentration of employment related to radio and TV broadcasting, with a mix of organizations serving the regional market—the ninth-largest for television and radio in the United States—as well as those that reach national and international markets. In total, 32 radio stations and 13 television stations serve the area, in addition to the sizable presence that virtually every major broadcast and cable news network sustains in the District. National Geographic Channel, Discovery, the Travel Channel, and the Public Broadcasting Service are all substantial employers within this component. Washington also boasts a major presence in radio broadcasting as home to the headquarters of National Public Radio, Voice of America, and, until a recent merger, XM Satellite Radio. These enterprises have resulted in a concentration of employment in radio broadcasting five times the national average.

MEDIA AND COMMUNICATIONS	
▶ TOTAL JOBS DC 2007	32,132
▶ PERCENTAGE OF GROWTH 2002-2007	-2%
▶ LOCATION QUOTIENT	2.2
▶ PERCENTAGE OF TOTAL CREATIVE JOBS	43%
▶ AVERAGE WAGE	\$94,786



VINCENT GALLEGOS / VGDA DESIGN

While America Online is no longer headquartered in the region, Internet broadcasting and media still constitutes a significant and growing component of the city’s creative economy. Virtually all periodical and newspaper publishers have established an online presence to complement their hard copy publications. Perhaps the highest profile new media endeavor in American politics is Politico, the website and print publication for political junkies founded before the 2008 elections by several former *Washington Post* reporters and editors.

Given the concentration of government, media, and nonprofit associations in the region, it is not surprising that the District also boasts a strong concentration of commercial companies in the “communication arts,” including companies in advertising, public relations, media buying, and multimedia and graphic design. While most of the global firms that dominate advertising employment are headquartered outside of the District, they account for approximately 1,500 local jobs in that field. Employment in public relations agencies, which utilize a wide range of creative talent to effectively communicate their clients’ messages, has a concentration in the District more than 26 times the national average, accounting for over 6,500

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Washington is also home to the publishers of magazines that rank at or near the top of their industry in terms of circulation, such as National Geographic, as well as the house publications of trade associations based in the city or region from the American Association of Retired Persons to the National Trust for Historic Preservation.

local jobs with global organizations as well as numerous smaller DC-based operations.

The media sector has a mix of highly specialized occupations such as editors, reporters, and directors, but also a significant number of back office and support positions. For instance, advertising sales agent is the largest occupation within the sector. Although not specifically “creative” in scope, clerical workers, mail clerks, and customer service representatives are all among the top 15 occupations within the sector. The media segment also employs freelancers such as writers, broadcasters, and multimedia artists, whose creative talents add value to these enterprises. More than 900 self-employed individuals work as subcontractors within communication industries.

Numerous higher education programs in the District train people for a variety of positions within the media sector, including degrees in print and photojournalism and graphic design. Educational institutions also play a role in continuing education for workers in the media field as well as helping career changers prepare for entry into media.

In addition to their full-time offerings, many institutions offer part-time programs to attract working professionals, while other schools specifically cater to those seeking media-related skills development outside of a degree program. Youth programs have also targeted projects in media to offer training, to expose youth to some of the media opportunities available in the area, and to provide a creative outlet for youth and young adults.

Challenges and Opportunities

DESPITE DC’S LARGE AND DIVERSE MEDIA SECTOR, THE DISTRICT HAS BEEN UNABLE TO AVOID JOB LOSSES. Many traditional media outlets have been cutting costs as their revenues have fallen. That cost cutting has included significant job cuts: from 2002 to 2007, DC’s media sector employment dropped by 2 percent. Newspapers shed 560 jobs, a 14 percent decline; motion picture and video employment decreased by 420 jobs, a 28 percent decline; and the periodical publishing industry cut 490 jobs, a 10 percent decline.

PRINT MEDIA IS LIKELY TO FACE CONTINUED CUTBACKS. Many newspapers from around the country already have eliminated or consolidated bureaus outside their home city, and Washington is no exception. Bureaus are likely to see even more reductions as newspapers scale back operations. The District’s own *Washington Post* is not immune to the downturn, having already offered four rounds of buyouts since 2003, including two in the past year. The Post is in the process of combining its Internet and print newsrooms, which has also led to cutbacks.

AS MEDIA FIRMS FACE COST-CUTTING PRESSURE, SOME MAY CONSIDER RELOCATING. While many prefer to be within the District, any staffing and operations that could be shifted to lower-cost locations may be vulnerable to transfer outside of the District. This is one manifestation of the larger problem of too little affordable space for creative sector enterprises in the DC real estate market.

AFFORDABLE SPACE AND ACCESS TO FINANCING ARE PARTICULAR CHALLENGES FOR FILMMAKERS AND ENTERPRISES IN THE NEW MEDIA INDUSTRY.

While it is often difficult for filmmakers anywhere to access financing for their endeavors, filmmakers in the District have reported particular barriers in obtaining loans to finance their studio space and productions. In addition, many companies in this sector need very small spaces, with considerable technology infrastructure. With limited incubator space currently available in the District, this has presented a barrier to those in the industry who would like to stay in Washington, DC.

AS THE INTERNET TRANSFORMS MEDIA, SEVERAL WASHINGTON MEDIA COMPANIES HAVE BEEN AT THE FOREFRONT OF THE CHANGE AND ARE SERVING AS LEADERS IN INTEGRATING MEDIA PLATFORMS.

Many journalists and staff require ongoing training to stay current in the use of new technology in journalism. Ongoing education in digital journalism and web design will be a continued need.

SEVERAL FORCES WITHIN THE MEDIA SECTOR GLOBALLY ARE MAKING IT EASIER FOR ENTRY INTO THE SECTOR AND INCREASING ENTREPRENEURIAL OPPORTUNITIES AS WELL.

The increase in online media activity combined with the social networking movement and the rise of “citizen media” through blogging has made it far easier for individuals to develop and share their own content. This represents an opportunity for Washington, DC-based entrepreneurs, though few as yet have found successful strategies to monetize their operations; even Politico.com, a success story in this regard, owes its profitability to print edition sales as well as online advertising revenues.

DC’S FILM INDUSTRY IS AN AREA THAT COULD BE

FURTHER NURTURED. With the federal government, national associations, and major institutions such as the Smithsonian and National Geographic, there is a critical concentration of both the market and the talent

needed to further grow the documentary film industry in Washington, DC.

VISUAL ARTS/CRAFTS AND DESIGNER PRODUCTS

Like other components of the DC creative economy, the visual arts segment has grown considerably over the last 10 to 15 years in both breadth and depth. Artists in the District create a wide range of artwork, from designers who produce eclectically adorned handbags to painters who embrace the District’s own homegrown school of painting, the Washington Color School. The visual arts/crafts sector includes abstract and realist painters and watercolorists; illustrators; sculptors who work in clay, metal, glass, and wood; photographers; potters; jewelers; and designers for the fashion industry. As just one example, according to the Greater Washington Fashion Chamber of Commerce, more than 100 designers for the fashion industry live and work in DC, comprising an important component of this segment of the creative sector.

While the strength of the city’s visual arts and crafts sector is apparent, it is somewhat difficult to demonstrate the full breadth of its impact through hard numbers, in large part because it is likely that official employment figures severely undercount the true numbers. To give one example, the combined workforce on the payrolls of private employers totals only 879 workers, while there are more than 1,200 self-employed individuals in the visual arts. Published data include 51 establishments that classify themselves as art dealers. A database of art galleries in the city, however, counts 156 such establishments.²⁴ Similarly, the published count of self-employed artists is undoubtedly low. Data from the arts councils and participation in local design and crafts fairs suggest that DC is home to a far larger number of artists and artisans than the above data indicate. Many artists and craftspeople work at other jobs as a means of earning a living and, as a consequence, do not show up in these employment classifications.

VISUAL ARTS

▶ TOTAL JOBS DC 2007	2,116
▶ PERCENTAGE OF GROWTH 2002-2007	5%
▶ LOCATION QUOTIENT	1.2
▶ PERCENTAGE OF TOTAL CREATIVE JOBS	3%
▶ AVERAGE WAGE	\$34,949



Art galleries are a fundamental part of the visual arts industry. Found throughout the city, they have become important exhibition spaces for artwork produced by young artists and more established artists alike. Types of exhibition space in the city range from artists' cooperatives, fine art galleries, and nonprofit galleries to arts displays hosted by larger institutions such as the universities and international organizations such as the embassies and the Interamerican Development Bank; and, increasingly, the city's clubs and restaurants. While there is no preeminent concentration of galleries in the District; there are some clusters, such as the 14th and U Street area and Georgetown, as well as galleries sprinkled through Washington's neighborhoods, with a few opening in recent years east of the Anacostia River.

Markets and fairs are also essential parts of the visual arts and crafts industry. Every Saturday and Sunday, the Eastern Market draws more than 12,000 visitors. The Crafty Bastards Arts and Crafts Fair, as well as events like Artomatic, provide important venues where local designers and craftspeople can show and sell their work. Artists, designers, and craftspeople are also turning to

the Internet in growing numbers to get their products to market, using such sites as Etsy.com. Nearly 200 individuals belong to the Capital Region Etsy Street Team, a group that promotes networking among people who market their wares through the website.

Production space, found throughout the city, is another key element of the visual arts industry. Examples of production space include Creative Clay Pottery, Key Street Studios, Scenic Artists, Union Printmakers, 411 Art Associates, O Street Studios, and Red Dirt Studios. There are a number of open studio events that showcase these facilities.

The strong support infrastructure for the visual arts and crafts industry in DC includes organizations like the Washington Project for the Arts, the Cultural Development Corporation, and the Washington Sculptors Group. Some neighborhoods also have groups that support local artists and craftspeople such as the Ward 7 Collaborative.

The most common occupations in the visual arts and crafts are, of course, artists—painters, sculptors, photographers, potters, glassmakers, fashion designers, and jewelers. In Washington as elsewhere, most artists, craftspeople, and designers are self-employed. An impressive educational and training infrastructure in and close to the city serves this segment of the creative sector. Within the DC public school system are a number of special schools and programs that focus on the visual arts. The Duke Ellington School of the Arts provides intensive pre-professional arts training, while charter schools like the Academy for Learning Through the Arts and the Children's Studio School of the Arts and Humanities teach children from pre-school through sixth grade in a variety of different art forms.

Outside of the K-12 system are other institutions and organizations that provide education and training in the visual arts. For example, the Millennium Arts Center offers classes and training in sculpture, pottery, glassmaking, drawing, and photography; Life Pieces to Masterpieces teaches painting to African-American

children and men; DC Painting Classes offers classes in various forms of painting; the Sitar Arts Center has programs for kids, teens, and adults in fiber arts, pottery, landscape painting, illustration, and sculpture; and the Washington Studio School teaches painting, drawing, sculpture, and photography.

Just outside the city are additional education and training programs. The Washington Glass Studio, which was once located within the District, teaches the art of glassmaking; the Art Institute of Washington offers bachelor's and associate's degrees in photography and fashion; the Washington Sculpture School offers classes and programs in different forms of sculpture; and VisArts Metropolitan Center for the Visual Arts has classes in the visual arts including drawing, ceramics, sculpture, photography, and glassmaking.

The many colleges and universities in the area represent another significant source of education and training for individuals in the visual arts and crafts. Of most note is the Corcoran College of Art + Design, which offers a BFA in Fine Art and an Associate's Degree in Fine Art and Fine Art Photography. Students at the Corcoran also can pursue certificate programs in drawing and painting, figurative studies, ceramics, jewelry, and printmaking. Other colleges and universities offering advanced degrees in the visual arts include American University, Catholic University, Gallaudet University, the University of the District of Columbia, Howard University, and George Washington University. Georgetown University Hospital has a program called Studio G, which is a multicultural artist-in-residence program founded in 1993.

Challenges and Opportunities

THE COST OF LIVING IN WASHINGTON, DC IS BEYOND THE MEANS OF MANY ARTISTS AND ORGANIZATIONS.

Washington, DC is one of the most expensive cities in the nation, and affordable living and production space is scarce. In many other cities, artists and arts organizations benefit from an abundant supply of older industrial space

and vacant buildings once primarily associated with manufacturing or warehousing that has been converted into studios for arts production; for a variety of reasons, Washington, DC has relatively few such spaces. Without adequate and affordable space to live and work among their peers, artists may be forced to relocate to more affordable locations outside of the District.

THE FASHION INDUSTRY HAS STRUGGLED TO EARN

RECOGNITION. The greatest challenge for the fashion industry has been to raise awareness of its presence and the significant contribution it makes to the District's economy. The Greater Washington Fashion Chamber of Commerce is conducting a census of designers in the city and hopes to organize a high-profile DC Fashion Week that will showcase local designers. Additionally, the Greater Washington Fashion Chamber of Commerce has received financial support from the city to enhance the competitive standing of the fashion design industry. Among its efforts is the establishment of a fashion incubator that could support independent design shops and serve as an anchor for a Fashion District similar to those in cities such as New York and Chicago.

THE MARKET FOR LOCAL ART HAS POTENTIAL TO GROW.

Many of the artists interviewed for this project expressed frustration at the small numbers of art buyers interested in locally-produced work. While cities such as Miami and Chicago have collectors specializing in local artists, there does not appear to be the same level of interest in Washington, DC even though the high average incomes of households in the Washington region should support a much larger local market.

THE DISTRICT'S IMMIGRANT POPULATION HAS REMAINED ISOLATED FROM THE LARGER VISUAL ARTS COMMUNITY.

The immigrant community in Washington is among the most vibrant in the country and a major source of innovative visual expression. According to local artists,

however, in many immigrant communities artists may not be selling to the community at large; instead, they are satisfied just trading among their friends and acquaintances. One reason is that many of these

individuals have little experience in marketing and selling to a larger customer base. If these individuals were given the support and training to market their products more broadly, they could expand their sales.

Summary of Strategies and Action Agenda

The creative economy at its core relies on innovation; entrepreneurial initiatives from this sector in particular could lead to re-tooled organizations, collaborations, and businesses, and could help buffer the District from some of the economic forces impacting the overall economy.

The economic importance of the creative sector to the Washington, DC and regional economies is clear, as is the strength and depth of each of the segments within the creative sector. This alone would justify an increased focus on further supporting, organizing, and promoting this component of the District's economy. The current economic environment, however, further bolsters the case for enhanced support. Although the District has been able to weather the recession better than other regions, its residents continue to face economic challenges, and the issues that confront the city's creative sector are of particular concern. However, the creative economy at its core relies on innovation; entrepreneurial initiatives from this sector in particular could lead to re-tooled organizations, collaborations, and businesses, and could help buffer the District from some of the economic forces impacting the overall economy. Additional support and a more strategic approach to building the creative sector could offer new opportunities and inspiration for all residents of Washington, DC.

The *Creative DC Action Agenda* lays out six key goals, with accompanying findings, strategies, and action steps.

These goals are:

CREATIVE SUPPORT: enhancing the support system to take better advantage of the city's deep creative assets.

CREATIVE MARKETS: promoting the District's creative economy and increasing the market for creative products.

CREATIVE YOUTH: enabling youth to explore and capitalize upon their creative talents.

CREATIVE WORK: providing new career opportunities for residents and an enhanced talent pool for creative businesses and organizations.

CREATIVE BUSINESS: promoting new enterprise development and small business growth amongst creative firms and entrepreneurs.

CREATIVE PLACES: developing a diversity of creative neighborhoods and spaces throughout the District.

Connecting and informing all of these goals is a set of principles that guides the *Creative DC Action Agenda*:

- **PROMOTE EQUITY AND OPPORTUNITY.** Fundamentally, this Action Agenda is intended to increase economic opportunity throughout the District, particularly its more distressed neighborhoods. Further employment growth in creative enterprises could provide new job opportunities for the city's unemployed and underemployed residents.
- **CONCENTRATE ON RELATIONSHIP BUILDING.** A common theme that emerged from all of the stakeholders was the need for, and deep interest in, building relationships that cut across disciplines and industries. There is a significant interest in greater collaboration, information-sharing, and strategic

partnerships, as well as a recognition that the District's creative economy will be stronger and more economically viable if new relationships emerge from the *Creative DC Action Agenda*.

- **FOCUS ON SCALE.** There is a wealth of programs and services in the District targeted to artists, creative enterprises, and youth. Many of these are small in size, however, and hampered by the lack of resources. Through capacity building and collaboration, these efforts can achieve a higher level of scale and effectiveness.
- **CONNECT CITY AND REGIONAL ASSETS.** Virginia and Maryland have become destinations and locations for a significant amount of creative activity and enterprise. Washington, DC can enhance its creative economy through working with other communities in the region to jointly leverage creative assets.

The following provides an overview of the key findings and challenges associated with each of these goals as well as a set of strategies and action steps to successfully achieve them. While there are a considerable number of action steps recommended, it is recognized that not all of these can be effectively implemented, particularly in a short timeframe. The chapter thus concludes with a set of immediate, priority actions to move the Action Agenda forward.

CREATIVE SUPPORT

GOAL: Enhancing the support system to take better advantage of the city's deep creative assets.

The Landscape

The long-term economic viability of any creative economy depends on a strong support system. Vital elements of that system include a stable funding stream to provide funding for the work of artists and cultural organizations; effective formal support institutions; extensive informal networking that brings together

creative individuals, cultural organizations, and for-profit creative enterprises; and broad-based, visible leadership that can articulate a vision for and advocate on behalf of the creative economy.

Funding

Arts and cultural institutions in the District have had access to a relatively broad set of public and private funding sources in the past three years. In fiscal year 2009, the city budget included a total of nearly \$39 million for arts and cultural activities, with more than half of that money set aside through earmarks for special projects such as \$10 million allocated to renovate Ford's Theatre. The majority of the remainder of these funds flowed directly through the DC Commission on the Arts and Humanities (DCCA) and the District's Office of Motion Picture and TV Development. In FY 2010, however, in the context of decreased revenue and fiscal projects, city officials made deep cuts to funding for special projects, and total arts funding fell below \$20 million. (See Table 5.)

DCCA re-grants much of its funding to nonprofit organizations and individual artists in the District. The Commission's budget also includes support for capital projects such as the creation and installation of art projects in public places, facilities support for nonprofit arts organizations, and the Art Bank program, which purchases local works of art that are placed in District government building offices and public corridors.

This overall city commitment to arts and culture is significant: the total DCCA allocation alone in previous years was larger than arts-related funding in most states, and only slightly below larger states such as Ohio and Massachusetts. On a per capita basis in 2007, just the direct arts funding through the DCCA by the District was 2.5 times greater than the next highest state. The unique governance structure of the District, however, almost necessitates this level of commitment: cultural organizations in other cities have access to both city and state cultural funding. For example, in FY 2010 the arts

budget for the state of Maryland was approximately \$13.6 million; the city of Baltimore both took a share of this money and allocated \$6.6 million in its local budget for arts and cultural activities.²⁵

In addition to local funding, arts and cultural organizations in the District have access to a very unique source of federal funding. The National Capital Arts and Cultural Affairs (NCACA) program, authorized by the U.S. Congress in 1985, was designed specifically to support arts and cultural institutions in Washington, DC. This program provides grants of up to \$500,000 to organizations engaged primarily in performing, exhibiting, and/or presenting the arts that can document annual income in excess of \$1 million. Total annual grant amounts have increased from \$7.14 million in 2007 to \$9.5 million in 2009.

Arts and cultural institutions in the District also benefit from substantial resources allocated by the federal government. Federally-owned cultural institutions derive support from direct federal appropriations. In FY 2007, the Smithsonian received \$620 million in federal appropriations and the Library of Congress received about \$562 million. Federal funds also directly supported capital improvements at the Kennedy Center. In addition, cultural institutions in the city have received a substantial amount of competitive funding through federal agencies such as the National Endowments for the Arts (NEA), the National

Endowment for the Humanities, the Institute of Museum and Library Services, and the National Park Service. In 2008, only the states of New York, Massachusetts, California, and Minnesota received more federal NEA grants than the District of Columbia.

Beyond public funding, artists and cultural institutions depend upon financial support from the philanthropic community, corporations, and individual donors. A number of local foundations, most notably the Morris & Gwendolyn Cafritz Foundation, the Community Foundation for the National Capital Region, and the Meyers Foundation, provide significant support to the arts. A recent study of giving by the 26 largest Washington area foundations estimated that these foundations made close to \$16 million in grants to arts and cultural organizations with a local focus in 2006. In addition to local foundations, the Greater Washington Creative Communities Initiative receives about \$150,000 a year through a national arts initiative that is overseen by the Cultural Development Corporation. The fund provides grants to pair emerging artists with nonprofit organizations to create community-based arts projects.

Support System

The District of Columbia also boasts a rich organizational support infrastructure for creative endeavors. There are

TABLE 5: Creative Economy-related City Funding

	FY 08	FY 09	FY 10
SPECIAL PROJECTS	\$16,900,000	\$21,150,000	\$6,400,000**
OFFICE OF MOTION PICTURE AND TV DEVELOPMENT	\$890,580	\$652,172	\$635,850
DC COMMISSION ON THE ARTS AND HUMANITIES	\$10,591,000	\$14,242,396	\$8,942,763*
DC COMMISSION ON THE ARTS AND HUMANITIES: CAPITAL PROJECTS	\$1,650,000	\$2,500,000	\$3,585,000
TOTAL	\$30,031,580	\$38,544,568	\$13,163,613

Source: District of Columbia Annual Operating Budgets and estimates based on current budget proposals.

*FY2010 DCCAH Budget includes \$1.575 million in funds transferred from the Neighborhood Investment Fund for 7 nonprofit arts organizations.

**Some of the Special Projects funding is through the Office of the Deputy Mayor for Planning and Economic Development

eight major organizations at the core of the creative economy's organizational infrastructure: Destination DC, Cultural Tourism, the Washington Project for the Arts, the Cultural Development Corporation (CuDC), the Cultural Alliance of Greater DC, the DC Commission on the Arts and Humanities, the Humanities Council of Washington, D.C., and the DC Office of Motion Picture and Television Development.²⁶ Collectively, these institutions market the District's arts and cultural assets, collect data on arts and culture, help artists find space, provide services to arts and cultural organizations and groups, help publicize and "package" events and promotions, direct visitors, and provide funding for artists and arts groups that are principally located in the District.

A number of other organizations also support the creative economy, but they are smaller in size and have a more limited focus. These include neighborhood specific organizations such as the Ward 7 Arts Collaborative, as well as industry specific organizations such as the Greater Washington Fashion Chamber of Commerce (GW FCC) and the Washington Project for the Arts that offer technical assistance and sponsor events for businesses in their fields.

Networking currently takes place within and through the major cultural organizations, through many of the smaller arts and cultural organizations in the neighborhoods, and through the many art centers found throughout the city. Networking also occurs more informally through citywide organizations like the CuDC's Red Circle, the CreativesDC Pink Line Project, and Advocates for the Arts. CreativesDC, for example, has organized several hundred people through its social and networking gatherings, and Red Circle maintains an extensive network that brings together artists and arts organizations. Events like Artomatic and the Capital Fringe Festival provide still more networking opportunities, allowing for program collaboration, strategic partnerships, and information dissemination. There are also a number of arts-related blogs that help maintain strong connections among people in the arts and cultural community.

In terms of leadership, the DC creative economy has a strong base of leaders within city government, the staff and boards of the major cultural organizations, the cultural institutions in performing arts and the museums, in arts and cultural enterprises, and among individual artists. These leaders have been powerful and effective advocates for funding and otherwise supporting the creative economy.

Challenges

ACCESS TO SUSTAINABLE FUNDING

The city's cultural institutions and individual artists are facing a limited funding environment, creating considerable vulnerability particularly for the smaller nonprofit cultural institutions and individual artists. The fiscal condition of the city has prompted a decline in the level of city funding capacity, affecting many of the city's cultural organizations. At the same time, foundations, corporate funders, and large individual donors are cutting back in response to their own investment losses and overall economic decline. The larger cultural institutions that depended upon their endowments to partially fund operating costs have seen the values of these endowments plummet. Giving by individual donors, a critical source of funding for cultural organizations, has also been seriously impacted by the recent financial crisis. Finally, grantmaking by two of the District's largest philanthropic funders, Fannie Mae and Freddie Mac, has fallen off precipitously in the wake of the recent financial turmoil. With both public and private sector funding for arts and culture in decline, many organizations are struggling to maintain their level of activities and staffing, and some are struggling just to stay in business.

EFFECTIVENESS OF COORDINATION AND LEADERSHIP

The major cultural organizations clearly play a vital role for the city's artists and cultural organizations. The creative economy, however, requires a broadly representative group of stakeholders acting in a coordinated fashion to help guide the sector to greater

strength and economic competitiveness. The current support system is not structured in this way; rather, there is some competition among these organizations and some overlap in regards to roles. Moreover, the support system is more focused on the nonprofit sector and, in many cases, on the members of the organizations, leaving non-members and for-profit firms out of the system. Further, although the existing system has produced a handful of leaders, there exists no one individual or defined leadership group that speaks with a unified voice about the creative economy and can guide implementation of this Action Agenda. If the creative economy is to serve as a key economic engine for the city, then a strong, well-organized leadership group must be in place.

AWARENESS OF THE SECTOR'S IMPORTANCE

The creative economy is a relatively new concept for DC. Although the city convened a summit on the creative economy just two years ago in 2007, the concept and how it applied specifically to the District was, prior to this analysis, inadequately defined and understood.

As illustrated in this report, the *Creative DC Action Agenda* views the cumulative artistic and creative activity of Washington, DC as an economic force that generates revenue, jobs, and economic opportunity and, thus, enhances the overall economy of the city. Expanding and deepening the public's grasp of the creative economy, as well as the promise it holds for economic gain, is imperative. The Action Agenda provides the platform for a more organized information and education effort around the District's creative economy.

EXTENT OF CROSS-SECTOR, CROSS-CITY, AND CROSS-GENERATIONAL NETWORKING

In spite of the breadth of the formal and informal networking activities in the District, much of the networking that occurs happens in silos—that is, within discrete industries like theater and within groups like visual artists. The kind of cross-disciplinary networking that should be happening within the broader creative community and within the context of the creative



VINCENT GALLEGOS / VGDA DESIGN

economy has been absent, with missed opportunities as the result. If, for example, film and music artists and organizations interacted more frequently, they might forge collaborations and alliances that could lead to new products and revenue streams for each industry. Another concern is that many smaller, neighborhood-based groups and organizations are not part of the networks that operate within the cultural mainstream. Finally, there is little cross-generational networking in the city. There has been an explosion of new hip, edgy, artistic activity occurring principally within a younger demographic of artists and entrepreneurs in the city. While this group has its own networking venues and

ARTS TAX INCREMENT FINANCING PROGRAM

In 2008, the city of Portland, Maine, established the first use of tax increment financing (TIF) for the arts. Recognizing the potential for gentrification following artists moving into a neighborhood, this program provides some protection for the original artists and the arts and cultural organizations located in a designated Arts District. A portion of any increases in property taxes associated with improvements through the renovation or construction of properties in the designated Arts District will go to support arts and creative economy uses. In the first use of the new program, \$30,000 of the approximately \$50,000 in increased taxes generated from the sale and renovation of a university dorm is going to support the Creative Portland Corporation, an organization focused on promoting the creative economy in that city.

norms, it largely operates outside of the other networks in place. This younger group will likely continue to grow, and its energy and entrepreneurial talents can add much to the city's creative economy.

Strategies for Success

The strategies for enhancing the creative support system and the action steps needed to implement them represent perhaps the most critical investment that the District can make in its creative economy. With an effective support system in place, the impressive assets already in place in the District will yield even greater benefits to the economy and community.

STRATEGY: Build relationships within the creative economy

ACTION STEP: Coordinate a coalition of private, nonprofit, and public sector stakeholders to work collectively to move the *Creative DC Action Agenda* forward.

ACTION STEP: Support networking opportunities within creative industry segments (e.g., music, theatre, museum, digital arts) as well as across segments that bring together the business community, creative enterprises, and nonprofit cultural institutions more regularly to discuss potential strategic partnerships. These efforts could be modeled on SPARK in the Berkshires. (See sidebar.)

BERKSHIRE CREATIVE SPARK

SPARK is a highly successful networking activity organized by the Berkshire Creative Economy Council. On a bi-monthly basis, it brings together several hundred people from the creative economy, the business community, and higher education, providing them a regular opportunity to meet in a low-key environment to discuss potential strategic partnerships. Its stated purpose is to facilitate “talk across industry, talk across sector, talk across town!”

STRATEGY: Increase support for, and awareness of, the nature and importance of the creative economy

ACTION STEP: Explore public-private funding enhancements and financing mechanisms to support creative product development, marketing, and direct assistance to the creative sector. (See sidebar for an example of Arts Tax Increment Financing.)

ACTION STEP: Meet with key public and private sector stakeholders in the city and region to provide information and materials related to the *Creative DC Action Agenda's* findings and strategies.

ACTION STEP: Ensure that the findings and recommendations of the *Creative DC Action Agenda* are linked to other city planning and investment activities (e.g., DCCA's strategic plan, neighborhood revitalization efforts, the zoning update, Great Streets, and the Neighborhood Investment Fund) in order to leverage existing city resources related to priority projects.

CREATIVE MARKETS

GOAL: Promoting the District's creative economy and increasing the market for creative products.

The Landscape

THE PRODUCT AND IMAGE

The current image of Washington, DC does not adequately represent the depth of its international assets, the diversity and strengths found throughout the city's neighborhoods, or the new and vibrant creative environment.

While Washington's status as an international city is somewhat known, the implications of its international community for the creative economy are largely overlooked. The 2008 Global Cities Index created by *Foreign Policy* magazine, measuring metropolitan areas on a variety of criteria, ranked Washington, DC 11th overall in the world in terms of its international characteristics. As the home to 180 international embassies as well as organizations such as the World Bank and the Inter-

The city's neighborhoods are full of creative activity that, at this point, remains more familiar to locals than to most visitors.



Evolution, Latin American Youth Center, 2008; Commissioned by the DC Creates! Public Art Program through the DC Commission on the Arts and Humanities

American Development Bank, the city is infused with an international character. The embassies and international organizations sponsor innumerable arts and cultural events throughout the year, develop partnerships with locally-based arts and cultural institutions, and provide an important market for some of the city's creative enterprises, most notably caterers and designers.

In addition to the embassies and international organizations, the District boasts a very strong immigrant community. An Urban Institute study in 2008 described the Washington, DC metropolitan area as "a primary recipient of the new immigration flows, ranking fifth among the top immigrant receiving communities." The region is home to large numbers of Salvadorans, Indians, Koreans, Chinese, Mexicans, Vietnamese, and Africans. Each of these communities brings its culture to the District, producing a broad range of cultural products from food, jewelry, fabrics, and pottery to paint, dance, theater, music, and film.

Finally, the city's neighborhoods are full of creative activity that, at this point, remains more familiar to locals than to most visitors. Cultural Tourism's Heritage Trails program highlights the culture and history within the neighborhoods and brings tourists and visitors to the neighborhoods. The Smithsonian's Anacostia Community Museum has been a core cultural institution in the Anacostia neighborhood since 1967.

THE MARKET

There are numerous existing markets for the creative products and services offered in the District. First and

foremost are visitors from all over the world who come to Washington for leisure and business travel. According to Destination DC, 16.6 million visitors came to DC in 2008, including 1.4 million international visitors.

The city's artists, cultural institutions, and creative businesses also export their goods and products throughout the U.S. and globally. Washington-based performing arts groups tour the world, museums located in the District curate traveling shows, and local creative businesses export their products outside of the Washington metropolitan region.

Within the District are many accessible internal markets. Most notably, federal procurement in the Washington MSA totaled \$66.5 billion in 2008.²⁷ In addition to the federal government, the District government, hotels, international embassies, colleges and universities, law firms, and the many national associations based in the city collectively purchase the full range of creative products and services.

Another important internal market for the creative sector is the people who live in the Washington metropolitan region. According to the Greater Washington Initiative, among regions with over one million residents, Greater Washington has the highest concentration of highly educated residents and the highest median household income. More than five million moderate- to high-income people reside within a 20-mile radius of the District, comprising a critically important market for the District's creative products and services. The tens of thousands of students that attend the District's higher education institutions provide another important internal

GEORGIA CREATIVE INDUSTRIES WEBSITE AND SHOWCASE

In February 2009, the Georgia Department of Economic Development (GDEC) and the Georgia Tourism Foundation launched www.GaMadeGaGrownProducts.org, a detailed creative industries database to help connect buyers and sellers, corporations and corporate suppliers, locals and visitors to Georgia's creative small businesses. The website includes a searchable database of the state's creative industries, complete with business profiles, locations, pictures, and contact information. While it too soon to assess its success, the website provides creative businesses in that state with a web presence and helps enhance the image of the creative economy of Georgia.

market for the District's creative products and services—they attend performing arts events, purchase local artwork, and so on.

In terms of getting product to the marketplace, numerous mechanisms help artists sell their work and cultural organizations cultivate their audience. Just a few examples of how and where cultural products are sold include the many art galleries around the city; the Eastern Market DC; festivals and fairs such as the Crafty Bastards Arts and Crafts Fair; programs such as Ticketplace; the city's Public Art and Art Bank program; and the marketing and promotional work of Destination DC, the Cultural Alliance of Greater Washington, Cultural Tourism, the DC Chamber of Commerce, and the city's Business Improvement Districts.

Challenges

ALIGNMENT OF IMAGE WITH CREATIVE STRENGTHS

The image of Washington, DC as a government town, with a relatively mainstream arts and cultural community concentrated on the Mall, no longer matches the reality of a vibrant and growing creative economy that is also

concentrated in smaller venues throughout the District's neighborhoods. Its international flavor and the diversity of its cultural assets are yet to be fully represented in the District's image. Washington has become a location of choice for young creatives drawn by job opportunities, a unique international community, the richness of the higher education institutions' assets, and its increasingly strong arts and cultural environment. Broadening Washington's image to incorporate these facts is a key opportunity for the city and should be a top priority for those tasked with marketing Washington to visitors, businesses, and talent.

CONSISTENCY OF MESSAGE

While a number of organizations market and promote the city's arts, culture, and entertainment, the proliferation of such groups somewhat muddles the message. With so many different organizations and sources of information on arts and cultural activities, and little coordination, uniformity and consistency are elusive. Additionally, the multiple calendars for arts and cultural events and entertainment further dilute clarity concerning the creative economy in DC and do not fully leverage the message and brand of the District as a thriving creative economy.

In addition, the *Washington Post*, the region's principal print media, has reduced its coverage of the arts, with the work of individual artists and some of the smaller and edgier arts organizations increasingly overlooked as a result. The consequence is that the public remains largely unaware of the real depth, breadth, and vibrancy of the arts in the nation's capital.

EFFECTIVENESS OF TOURISM INFRASTRUCTURE

Despite a generally strong tourism market, the District's tourist infrastructure is not effective at drawing visitors beyond the Mall or promoting the events and performances that are being sponsored locally throughout the year in the neighborhoods. The city had one visitors' center that was located in the Reagan Federal

Building and run by the DC Chamber of Commerce with limited involvement from any of the arts and cultural organizations. With its recent closure, and until a new location is found, the District is without a visitors' center. The result is a missed opportunity in terms of encouraging visitors to experience the rich creative and cultural assets in neighborhoods throughout the District. Also, the concierges and hospitality industry in general are not well informed about "off the Mall" creative economy events and activities, especially those in the neighborhoods.

ACCESS TO MARKETS FOR ARTISTS AND CREATIVE BUSINESSES

Many producers of creative products in the District have limited knowledge of how to access the huge federal marketplace as well as other large institutions in the city, such as embassies, hospitals, and colleges and universities. There is no system or mechanism in place that could enable the arts and cultural community to showcase, exhibit, or sell its products in an organized way. Also, artists and arts businesses in some of the city's immigrant communities tend to sell their products only within those communities. A related challenge is that few arts and crafts markets in the city focus on the products of local immigrant communities. And, while the Eastern Market and various short-term festivals do provide some access to markets for the District's creative products, the full potential of selling local artisan products has not been realized.

AWARENESS OF DISTRICT'S CREATIVE PRODUCTS

Many of the businesses, government entities, and institutions that purchase creative products such as graphic and multimedia design have inadequate information about the creative producers in the District. In addition, only a few of these institutions have made an explicit commitment to purchasing local creative products. This contrasts with some European countries where major hotels have made a commitment to buying the work of local artists. While the city has a program to purchase local art, most other large art buying institutions

WORLD CULTURAL ECONOMIC FORUM

The state of Louisiana holds an annual World Cultural Economic Forum to highlight the multifaceted cultural industries in New Orleans and the rest of the state. Each year, more than 600 people from 65 countries come to New Orleans to take part in a series of exhibitions, festivals, music and dance performances, and workshops. The event helps raise the visibility of Louisiana's international cultural assets and underscores the economic importance of cultural industries.

that might purchase creative products and services have limited knowledge of the local creative community.

THE LEVERAGING OF INTERNATIONAL ASSETS

Several of the major cultural organizations collaborate programmatically with embassies and cultural affairs offices from Europe, Asia, and South America. Cultural Tourism's Passport DC and some programs of the Alliance are two examples. These and other initiatives have begun to better leverage the cultural assets of the international community, but these collaborations have not approached their full potential in terms of substantive depth or broad promotion throughout the city.

STRATEGY: Market and promote DC's creative and cultural assets

ACTION STEP: Pursue a promotion strategy with key marketing organizations (e.g., Destination DC, Cultural Tourism, the Cultural Alliance) that brands the District's creative image and identity. Consider using DC's creative community to develop a common logo for use on websites and marketing materials as well as innovative signage, banners, and other media to more effectively market the city's creative assets, including those beyond the Mall.

ACTION STEP: Increase visitor awareness of DC's creative assets by enhancing the visitor information system. Efforts could include rethinking the location and

SOWA OPEN MARKET — BOSTON

Now in its seventh year, the SoWa Open Market is an eclectic outdoor market in Boston's South End that is open on weekends during the summer months. The market offers a mix of visual artists and artisans; emerging jewelry, clothing, and accessory designers; artisanal bakers; and local farmers. Initially modeled on New York City's Chelsea Market, SoWa soon expanded to focus on independent designers, artists, and food. The market also includes a vacant mill building used by 150 artists who do not have their own galleries. Other retailers located in the area have seen their sales increase as a result of customers drawn to the market.

operation of the visitor center(s) in the city, placing kiosks in the neighborhoods, and more effectively coordinating cultural calendars.

ACTION STEP: Coordinate periodic training and information sessions for the concierges of the major hotels throughout the city to better educate them about DC's creative economy, coordinate distribution of creative event listings to visitors, and explore cross-promotional opportunities between hotels and creative offerings.

STRATEGY: Develop new markets for local creative products

ACTION STEP: Support business-to-business product showcases, both online and in-person, that provide a platform (e.g., "creative expo") for local entrepreneurs to market creative products and services to the government, private, and nonprofit sectors.

ACTION STEP: Market the city's Art Bank program, a special fund that purchases local art for display in city buildings, to include potential purchasers such as hotels, hospitals, and universities. The city could explore opening this fund to other institutions and major employers so that more businesses can contribute and display local art in their facilities.

ACTION STEP: Develop new art walks, seasonal art markets (e.g., in public space), and art exhibition areas (e.g., hotel lobbies) to provide artists and art enterprises greater opportunities to market their work. (See sidebar on SoWa Market.)

STRATEGY: Leverage DC's international status and assets

ACTION STEP: Create a working partnership between foreign mission cultural attachés and key creative economy support organizations to collaborate on new creative programming and products.

ACTION STEP: Raise the international profile of DC as a global creative city through activities such as international exchanges, creative industry trade delegations, and highly visible creative events.

CREATIVE YOUTH

GOAL: Enabling youth to explore and capitalize upon their creative talents.

The Landscape

Most citizens in the District are first exposed to the arts in school. The city's public schools provide general arts education through one-time events and semester-length programs in addition to specialized schools offering pre-career training for the arts. Supplementing the formal educational system is a wide array of voluntary after-school and summer programs.

The District has a large number of public, private, and charter K-12 schools, colleges and universities, and for-profit and nonprofit supplementary or complementary programs that both replenish the creative economy workforce and foster a new generation of arts enthusiasts. Moreover, many primary, secondary, and postsecondary schools also are beginning to integrate the creative arts into their academic curricula to stimulate critical thinking and innovation and improve educational outcomes.

At the K-12 level, the District of Columbia Public Schools (DCPS) has recognized the importance of

.....
Many primary, secondary, and post-secondary schools also are beginning to integrate the creative arts into their academic curricula to stimulate critical thinking and innovation and improve educational outcomes.



MARISA GAITHER FLOWERS, GREEN DOOR ADVISORS, LLC, 2009

arts education through actions including adoption of standards for the arts in May 2008. The DC Arts and Humanities Education Collaborative, which has worked with DCPS since 1998, publishes a directory of arts events, activities, and programs for students and teachers; serves 30,000 school children a year through its programs; offers workshops for teachers; and has developed several pilot programs in DC schools through the Ford Foundation-funded Arts Education Institute.

Beyond arts education in the general school curriculum, the city has a strong cohort of specialized schools that focus on arts and culture and specialized programs in a range of creative occupations. The best known of these is the Duke Ellington School of the Arts, which provides intensive pre-professional arts training in dance, theater, instrumental music, vocal music, technical theater, visual arts, literary media, and museum studies for students in the 9th through 12th grades. Additionally, several charter schools incorporate arts training into a full academic curriculum. The William E. Doar, Jr. School for the Performing Arts, serving grades K through 11, is a charter school that offers stringent academic education combined with a strong arts focus. The Academy for Learning Through the Arts, a charter elementary school, incorporates drama, music, visual arts, and dance with basic concepts to foster a deeper understanding of its academic subjects. The focus of the Children's Studio School of the Arts and Humanities, a public charter school

for children in pre-school through 6th grade, is to provide a community-based arts and architecture education.

Career and technical education (CTE) also has begun to add emerging creative occupations to its traditional career programs. Creative skills are among the 12 "career clusters" that form the basis of the city's vocational education system. McKinley Technical School is perhaps the strongest example, utilizing creative endeavors such as broadcasting, gaming, and web design to produce the city's highest level of STEM (science, technology, engineering, and math) skills. Other CTE programs include Ballou High School's arts and summer media arts program; Roosevelt High School's Academy for Hospitality & Culinary Arts; and Phelps High School's new programs in architecture, landscaping, and interior design.

Students not enrolled in one of the art-intensive city schools can still benefit from the many arts-related after-school, summer, and community-based instructional programs in the area. For example, the Washington Performing Arts Society (WPAS) offers several programs in collaboration with public schools. Community Help in Music Education (CHIME) offers an in-school music enrichment program and after-school music instruction and organizes live music performances, while other programs target certain ethnic groups and at-risk youth. The Multi-Media Training Institute in Northeast DC targets some of the more disadvantaged areas of the city, and the Art & Media House focuses on Latin American youth.

EL SISTEMA —THE VENEZUELAN YOUTH ORCHESTRA

In Venezuela, El Sistema (The System) is a network of more than 100 youth orchestras found throughout the country. El Sistema, the brainchild of Jose Abreu, was started in 1975 as a formal program of classical music instruction. Abreu's idea was to use classical music as a means of empowering young, poor children. Since its inception, the program has taught more than 300,000 young Venezuelans and has been adopted in one form or another by countries all over the world.

Efforts are now taking place to support similar efforts in the U.S. In 2009, the New England Conservatory of Music launched the Abreu Fellows Program, which provides a one-year postgraduate certificate program for young musicians who desire to become ambassadors of El Sistema and who are committed to developing it outside of Venezuela.

Challenges**ARTS EDUCATION RESOURCES**

While the leadership of the DCPS has recognized the importance of arts education, the development of support systems, including the financial commitment to arts education in the system, has lagged. Many public schools still lack the resources to offer students exposure to the arts and skill instruction in a continuous and coordinated fashion. The school day itself also has included less time for the arts over recent decades, owing in part to the pressure for more math and science instruction. Funding pressures mean that although the DCPS budget includes language to provide music and art instruction, the money might not be available for funding of art-specific programs or for related costs such as transportation to get students to programs and performances outside the school.

STAFF CAPACITY

Many artists and arts organizations feel that DCPS does not have adequate staffing or coordination to take full

advantage of the District's arts and cultural resources. The interest and resources to close this gap are available within the arts community, but more could be done around facilitating engagement between artists and arts groups and the school system.

KNOWLEDGE OF CREATIVE CAREERS

In the secondary schools, most arts education is heavily oriented towards the visual and performing arts. With few exceptions—most notably the strong media and digital arts at McKinley Tech—there is no career preparatory programming across the full range of creative occupations. A lack of information available to parents, teachers, and counselors about the career paths and types of opportunities available within the creative economy in part explains this absence.

Strategies for Success

The challenges to achieving the goal of full access to creative education in Washington's public schools are real but not insurmountable. The following are two overarching strategies with specific action steps that individuals and organizations can take to meet the goal.

STRATEGY: Explore enhanced arts and creative programming for youth

ACTION STEP: Support an online platform that consolidates all arts and cultural programming for youth. The website is intended to provide kids with more exposure to, and involvement in, arts and culture.

ACTION STEP: Pursue transformative art and music programs that empower disadvantaged youth to succeed and support community development. (See sidebar on the Venezuelan Youth Orchestra.)

ACTION STEP: Create or designate multidisciplinary arts centers and other arts-related spaces in neighborhoods that could serve as central one-stop locations for creative activities, such as instruction, exhibition, and rehearsals.

To be economically viable over the long-term, the District’s creative economy will require a skilled and talented workforce. The caliber of that workforce will depend to a great extent upon the quality of training and workforce development programs.



STRATEGY: Support enhancement of arts education

ACTION STEP: Explore an arts education strategy within the District’s Public School System that ensures students have access and exposure to a quality arts education.

ACTION STEP: Pursue a specialized philanthropic arts education fund to support an arts education strategy, using the Boston Arts Expansion Fund as an example. (See sidebar).

CREATIVE WORK

GOAL: Providing new career opportunities for residents and an enhanced talent pool for creative businesses and organizations.

The Landscape

To be economically viable over the long-term, the District’s creative economy will require a skilled and talented workforce. The caliber of that workforce will depend to a great extent upon the quality of training and workforce development programs. Programs in the city that provide workforce and training services, while not specifically focused on creative occupations, represent a critical resource in supplying adequately skilled individuals to fill employment opportunities in the creative sector.

Within city government, the Department of Employment Services (DOES) oversees several program areas and services related to workforce development. For example, DOES operates two one-stop centers and seven satellite centers that offer residents access to a range of employment-related resources and job listings. DOES also provides information on apprenticeship programs, as well as a listing of approved training providers to which employers can turn for workforce training and recruitment help.

The Summer Youth Employment Program (SYEP) is another program administered by DOES. This nine-week program provides paid career-focused employment to young people ages 14 to 21 in fields such as design and media, as well as in healthcare, hospitality, and tourism.

ARTS EXPANSION FUND—BOSTON

In 2008, the superintendent of Boston Public Schools, in collaboration with local funders, began a planning initiative to identify gaps in current arts offerings in schools and to develop strategies to address those gaps. One of the key recommendations was the creation of the BPS Arts Expansion Fund, a \$1.5 million philanthropic fund to address equity gaps, promote best practices, and implement effective expansion strategies. The school district acted on the recommendation by fully capitalizing the fund, which will make its first grants in the 2010 school year.



Beyond city government, additional workforce development entities include the Greater Washington Workforce Development Collaborative (GWWDC). An initiative of the Community Foundation for the National Capital Region, GWWDC is a coalition of 13 local foundations and public partners. Over the next few years, GWWDC plans to step up efforts to help low-income, low-skilled adults obtain and retain jobs that provide good wages and benefits. The GWWDC has chosen healthcare and construction as the two sectors on which to initially focus its efforts; these sector-focused projects could provide the template for a similar effort in the creative sector.

In addition to the general workforce training system, which has not focused on creative occupations, a strong base of specialized certificate and degree programs in the Washington area does provide postsecondary education and training that relates to the creative sector:

- The city's colleges and universities are important components of the workforce and training system. Collectively, the higher education institutions offer certificates, graduate, and undergraduate degrees in such areas of the creative economy as performing arts, design, architecture, interior design, fine arts, museum studies, and communications and media.²⁸ Of particular relevance to the creative economy, the Corcoran College of Art and Design, associated with the Corcoran Gallery of the Arts, offers bachelor's

The DC Department of Employment Services also provides information on apprenticeship programs, as well as a listing of approved training providers to which employers can turn for workforce training and recruitment help.

degrees in fine arts, fine arts photography, interior design, photojournalism, digital media design, and graphic design and master's degrees in interior design, the history of decorative arts, exhibition design, and arts education. Another unique asset is the Documentary Center at George Washington University's School of Media and Public Affairs, which is one of the few places in the U.S. that focuses exclusively on teaching documentary film production.

- Other independent, specialized training programs include the National Conservatory of Dramatic Arts, the Studio Theatre Acting Conservatory program, the Multi-Media Training Institute (MMTI), Inc., and DC Central Kitchen. These schools and programs are among the many that provide occupational and professional training for creative occupations.
- Several labor unions also play a role in the creative workforce. The key labor unions active in the creative economy are Actors' Equity, the American Guild of Musical Artists, International Alliance of Theatrical and Stage Employees (IATSE), and the American Federation of Musicians.

Challenges

UNDERSTANDING OF CREATIVE CAREER PATHWAYS

Most of the District's higher education institutions understand the creative economy and feature programs that provide related training and skill development.

Outside of these institutions, however, the other components of the city's workforce system have not targeted efforts towards nor developed programs around the creative economy and its employment potential for DC residents. Most of the workforce and training resources of the workforce system target employment and careers in traditional economic sectors like healthcare, construction, and hospitality, with the creative economy an afterthought at best. The absence of any real focus on creative sector jobs extends to the K-12 educational system, where weak links with higher education and workforce programming make it less likely that young people will perceive the creative economy as a possible career option and pursue training for a position within it.

TRAINING GAPS IN KEY CREATIVE SEGMENTS

Three key segments of the creative economy—culinary arts, media and communications, and museums/heritage—account for thousands of jobs in the Washington, DC area, yet career-track education, job training, and employment services in these three segments are limited. For example, despite a very large culinary arts industry concentration in the city, only the Arts Institute of Washington in Arlington and Stratford University in Falls Church offer degree programs. Similarly, the museums and heritage segment of the District's creative economy supports more than 10,000 jobs, the majority of which require limited training and education. Currently, each museum has its own internal training programs or it outsources for some basic training. Identifying common skill training needs and developing collaborative training programs could provide greater efficiencies for these institutions as well as career-track opportunities for residents. Finally, while there are considerable opportunities for technical jobs in the media industry, few training programs focus on career ladders in this segment.

CREATIVE JOB BANKS

A number of cities and states have developed searchable sites that provide information on employment opportunities in arts and cultural industries. The Greater Philadelphia Cultural Alliance's Job Bank provides up-to-date listings on jobs of all types in the city's arts and cultural arena. The Massachusetts Cultural Council oversees **hireCulture**, a free, searchable database of cultural employment opportunities in Massachusetts. **hireCulture.org** has 1,000 registered organizations, including schools, theaters, museums, galleries, and cultural societies. **Berkshire Creative in Massachusetts** provides job listings that are more comprehensive and focused on the full range of creative jobs in both nonprofit cultural organizations as well as commercial businesses.

INTERNSHIP CAPACITY AND LINKAGES

While teaching young people in the classroom provides a good foundation for skills development in the creative economy, taking the additional step of arranging internships with cultural organizations and creative firms would represent another effective strategy to ensure that individuals enter the workforce fully prepared. Currently, however, there is no systematic means for students or officials to identify the internship opportunities that exist within creative and cultural institutions, nor to coordinate internships within the higher education community. For the most part, institutions secure internships for students based on individual relationships between staff at cultural institutions and faculty members. While there are notable exceptions, in general, the higher education institutions are removed from the District's creative economy organizational infrastructure—the schools have limited relationships with artists, cultural organizations, and creative businesses.

Strategies for Success

STRATEGY: Build closer relationships between the higher education system and DC's creative community

ACTION STEP: Leverage the Consortium of Universities as a vehicle for coordinating creative career activities amongst regional higher education programs and creating more linkages with the DC creative community.

ACTION STEP: Pursue a Higher Education / Hire Creative Program that links student and interns with job and entrepreneurship opportunities in the creative sector. Coordinate with key organizations (e.g., Consortium of Universities) in the design, development and implementation of the program.

ACTION STEP: Organize "Hire Creative" events in which key creative companies such as theater, museum, design, and media have open houses and provide overviews of their industry and career opportunities to students.

STRATEGY: Provide more targeted information on creative job opportunities and career pathways

ACTION STEP: Pursue a one-stop online job bank, which leverages the Department of Employment Services' capacity, and is specifically targeted to creative jobs in the public, private, and nonprofit sectors. (See sidebar on page 59 for examples of creative job banks.)

ACTION STEP: Provide more detailed information on career pathways in the creative occupations, including the types of careers that are available in each creative industry as well as the skills and training required.

STRATEGY: Offer training programs tailored to the workforce needs of creative industries

ACTION STEP: Explore collaborative sector training programs that would equip residents (particularly under- and unemployed) with the skills needed by creative industry employers. Target industries could include museum (customer service), media and communication, and culinary arts. Key partners include

the Greater Washington Workforce Development Collaborative (GWWDC).

CREATIVE BUSINESS

GOAL: Promoting new enterprise development and small business growth amongst creative firms and entrepreneurs.

The Landscape

The ability of creative businesses to start up, grow, and thrive is key to maximizing the economic benefits of the creative economy. Creative businesses need access to certain critical resources in order to succeed, with specific requirements varying by the size of the enterprise, its stage of development, and the industry segment within which it operates. The full range of creative businesses extends from individual artists and performers, to small- and mid-sized locally-owned graphic design and digital media firms, to large established architecture firms, advertising firms, and media companies with hundreds of employees.

A number of government agencies (e.g., the Department of Small and Local Business Development), citywide nonprofits, community-based organizations, and higher education institutions offer assistance to businesses in the creative sector. These organizations typically provide one or more of the following services: 1) one-on-one counseling; 2) training courses addressing a range of business management topics; 3) resource information; 4) networking opportunities; and 5) referrals to financing sources and private business assistance professionals. Selected business assistance entities also offer direct financing. For example, the District's Enhanced Business Information Center (E-BIC) provides DC small businesses and entrepreneurs with training, consulting, and computer resources that help their business become successful. At the youth level, the National Foundation for Teaching Entrepreneurship (NFTE) provides entrepreneurial training for middle school and high school youth.

The ability of creative businesses to start up, grow, and thrive is key to maximizing the economic benefits of the creative economy.



Some organizations that serve a general business clientele tend to work with a high proportion of creative enterprises. For example, ARCH Development Corporation, which serves Anacostia, has put arts and cultural-related economic development at the center of its community revitalization efforts. Its business assistance activities aggressively target artists and arts-related businesses. Affinity Lab is a shared space for startup and small businesses and nonprofit organizations that caters heavily, although not exclusively, to creative businesses. It provides space and management services, and organizes and facilitates networking and relationship building among its members. Also, the Lab has recently teamed up to organize joint events with Dekka, a co-op that brings together local and emerging fashion, music, and art.

The District also includes some organizations that focus exclusively on creative economy enterprises, with a particular emphasis on nonprofit arts organizations and individual artists. The Cultural Development Corporation (CuDC) operates the Business Center at Flashpoint, which supports and incubates business through providing access to affordable office, exhibit, rehearsal, and performance space as well as one-on-one technical assistance, workshops, seminars, and discussion forums to artist entrepreneurs and cultural organizations. CuDC also assists artists groups and cultural organizations with facilities planning and consults for developers, architects, building owners, government agencies, and other real estate professionals looking to developing space for arts and cultural uses.

The Cultural Alliance of Greater Washington offers a variety of programs and services to support the growth and financial sustainability of arts and cultural organizations. These include workshops on arts management and marketing as well as one-on-one technical assistance through the Business Volunteers for the Arts®/Washington program. More recently, the Kennedy Center has announced a national program to provide assistance to small nonprofit cultural institutions facing challenges in the current economic environment.

In addition to technical assistance, a number of financing and financial incentive programs are available to creative firms, especially those in the media and communications segment. The DC Certified Capital Company (CAPCO) Program provides a local tax credit to insurance companies in exchange for making \$50 million available to three CAPCOs managed by professional venture capitalists. Among their investments are firms in the media and communications segment, particularly in digital media and software development. One of the funds also made an investment in a firm specializing in historic preservation.

In the private sector, LaunchBox Digital provides seed funding and administrative support, mentoring and advice, and access to other investors and strategic partners. Another measure of support comes via the District's New Economy Transformation Act (NET 2000), which provides tax incentives for qualified high technology companies including Internet-related applications, services, and sales; information and communications technologies; and animation and full-

SEEDCO'S ARTBUSINESS INITIATIVE

This program provides loans and services to nonprofit and for-profit arts-related enterprises. Recipients of loans can use funds for “start-ups and expansions, construction and renovation of facilities, purchase of new equipment, and debt consolidation.” In New Orleans, where Seedco has an ArtBusiness program, the organization has provided financial and technical support to more than 140 arts enterprises and organizations. Technical assistance services include strategic marketing, business planning, financial management, and access to financing.

motion video.

The city also has a number of smaller financing programs that small creative businesses can access. Five local organizations offer loans of up to \$50,000 to businesses through the U.S. Small Business Administration's Micro Loan Program, and two of these organizations also operate their own business loan funds. In late 2008, the DC Department of Small and Local Business Development launched a pilot Micro Loan Program that offers up to \$25,000 in financing to businesses that are designated as “small” and “disadvantaged” through the certified business enterprise program. In addition, the Neighborhood Investment Fund (NIF), which is capitalized by an annual contribution from the personal property tax, finances economic development and neighborhood revitalization in target areas, including predevelopment grants and low-interest land acquisition loans to nonprofits and community-based organizations.

Challenges**ASSISTANCE TO CREATIVE ENTERPRISES**

General business assistance programs are typically not well equipped to address business issues specific to creative enterprises. For example, developing markets for creative products often requires very specific market

knowledge and familiarity with particular marketing strategies and tools. Certain creative economy segments have unique distribution channels, such as galleries in the visual arts and content distributors in the performing arts. And, in the age of virtual marketing, all entrepreneurs have to understand how to effectively market their products through the Internet—a different type of task for creative businesses than for those in traditional fields.

Another challenge is that creative businesses are often disinclined to view their activities through a business perspective. Business assistance providers who specialize in working with creative businesses report that individuals in creative fields bring a different mindset to their work than do counterparts in other industries; it is important to communicate in a manner that helps them to reconcile their creative values with a business orientation. This can increase their receptiveness to establishing appropriate legal structures and applying necessary financial management tools.

FRAGMENTATION OF SYSTEM

While multiple sources of business technical assistance are available for creative enterprises, firms or individuals less well versed in the details of these programs often do not know where to start. Multiple entry points for assistance and the absence of a comprehensive resource inventory frustrate the efforts of creative businesses to obtain the best available assistance.

RESOURCES FOR THE TECHNICAL ASSISTANCE SYSTEM

The entire business assistance system is facing a decline in resources. Most significantly, the city's Department of Housing and Community Development recently announced that budget constraints as a result of the economic downturn meant that the agency would be terminating contracts with a number of general business assistance providers, a move likely to force those providers to cut back or eliminate their business assistance programs.

FINANCING FOR CREATIVE FIRMS

Despite the programs noted above that provide investment, many small and early-stage creative businesses face serious barriers to obtaining financing. Most startup and small businesses in all sectors of the economy experience difficulties in this regard, but creative businesses face particular hurdles that often render even less restrictive public sector and nonprofit financing sources inaccessible. One problem is the creative nature of their product, which makes it difficult for potential providers of finance to assess marketability and sales potential. A second problem is that creative entrepreneurs themselves often lack substantial personal assets to invest in their business, and a third is the perception (and sometimes the reality) that creative entrepreneurs possess inadequate business management skills. These concerns point to the need for stronger linkages between technical assistance and financing sources, which could increase the confidence of the financing sources in the viability of creative businesses in need of capital.

Strategies for Success

STRATEGY: Provide assistance to businesses in the creative industries

ACTION STEP: Market the new city Micro Loan Program, its benefits and requirements (e.g., Certified Business Enterprise requirement) to creative businesses and entrepreneurs.

ACTION STEP: Increase awareness amongst existing business development providers about the needs and opportunities of creative enterprises and artists, and better connect resources and programs to the creative community.

ACTION STEP: Work with business assistance providers to target the development and growth of creative enterprises by immigrants, residents, and youth.

STRATEGY: Explore economic development opportunities associated with creative segments

ACTION STEP: Assist with identification and marketing of existing incubator space in the city to creative

businesses, and with the exploration of the feasibility of industry-specific incubators (e.g., culinary arts, technology, fashion).

ACTION STEP: Investigate the development and promotion of the District as a hub of the nation's new media industry.

ACTION STEP: Target economic development opportunities at the intersection of the green, retail, and creative sectors (e.g., promoting sustainable building and design in partnership with the city's architecture and interior design industries; clustering design-oriented retail and arts galleries in specific commercial areas; and building upon the momentum of new restaurants and the culinary arts).

ACTION STEP: Coordinate with stakeholders from the green, retail, and creative industries to make progress on immediate synergistic projects that leverage public, private, and nonprofit resources and partnerships.

CREATIVE PLACES

GOAL: Developing a diversity of creative neighborhoods and spaces throughout the District.

The Landscape

Fostering the creative economy rests in large part upon maintaining and improving upon existing strengths, attracting new enterprises, and maintaining quality of life. Two major components of this are ensuring an adequate supply of suitable and affordable creative space to meet the needs of a variety of different business, residential, and cultural uses, and nurturing vibrant creative places and neighborhoods.

The city's Comprehensive Plan recognized the importance of arts and cultural uses in the District and notes:

"The ability of arts organizations and artists to thrive in our city is dependent on having suitable production, performance, and exhibition space.



MARISA GAITHER FLOWERS, GREEN DOOR ADVISORS, LLC, 2009

The required facilities include studios, rehearsal halls, theaters and concert halls, dance rehearsal and performance spaces, exhibition spaces and galleries, multipurpose centers, classrooms, administrative offices, and art storage facilities, among others. Many of these facilities are completely absent in large parts of the city, especially in East of the River neighborhoods. Where they do exist, they may be threatened by rising rents and redevelopment pressure.”

The Comprehensive Plan called for the creation of new arts facilities in neighborhoods that lack them (such as Anacostia), proposed efforts to expand artist live-work space, and urged revising zoning regulations to make it easier to use garages and other accessory buildings as arts studios.

Creative spaces incorporate a wide range of physical space with a variety of uses within that space. The following types of spaces are relevant to the creative economy:

- Workspace/office space (incubator, boutique office, studios);
- Housing (permanent, temporary, group, other);
- Production (warehouse, stage, etc.);
- Nonprofit cultural space (community centers, museums, theatres);
- Commercial space (retail, galleries, restaurants); and
- Education (training facilities, postsecondary education).

Certain creative spaces may be more suitable and sustainable in some locations than others given

The ability of arts organizations and artists to thrive in our city is dependent on having suitable production, performance, and exhibition space.

neighborhood characteristics, building stock, and market conditions. Moreover, through the clustering of similar creative activity, the District will begin to develop new creative environments and destinations. However, all of these types of spaces can contribute to the overall health and vitality of the creative economy.

Current Zoning and Land Use

The District has already done more than many cities to promote the arts and culture through its land use planning and zoning process. Arts overlay districts, with requirements for certain percentages of arts-related space, ground floor uses, density incentives, and flexible combined lot development, already exist in the District. The District has applied arts overlay zoning to three specific areas—Downtown, a multi-street designation that includes 7th and 9th streets, NW; Uptown (primarily 14th Street and U streets, NW); and an arts sub-district as part of the H Street, NE overlay.

The existing arts districts use zoning to influence urban design, streetscape, ground floor uses, and the inclusion of arts and retail uses in each new development. Unlike many arts districts nationwide, DC also grants developers density bonuses as an incentive to include preferred uses in their buildings. The existing Uptown ARTS and the Downtown overlay districts require that a certain amount of floor area ratio (FAR) be designated for retail, service, or arts-related uses, so-called “preferred uses.” In exchange, developers receive a FAR bonus of up to three times the area devoted to the preferred use.

In addition to the existing arts overlay districts, the Office of Planning and the Zoning Commission are in

the process of reviewing the current zoning regulations with the goals of updating, clarifying, and simplifying the current code. As part of that process, the Office of Planning created a Zoning Review Arts and Culture Working Group (Zoning Working Group) to develop specific recommendations related to zoning revisions of relevance to the creative community. The Zoning Working Group has drawn up recommendations related to developing Art Districts, streamlining the list of land uses, and requirements and bonuses for art districts; applying design standards to ensure active neighborhoods; and allowing appropriate art uses in residential areas.

Since many creative businesses and artists operate from their homes, regulations regarding home occupations are another area of zoning that is of relevance to the creative sector. The DC zoning regulations use a well-accepted definition of home occupation, which states that a home occupation “is a business, profession, or other economic activity conducted full-time or part-time in a dwelling unit that serves as the principal residence of the practitioner of the home occupation.” Home occupations are allowed by special permit, which may be granted without public hearing provided that certain conditions are met.

The Zoning Working Group recommended expanding the number of uses permitted as home occupations to include any use that fits the definition of an artist studio as a home occupation. This would allow, or at least legitimize, current artists practicing in their homes or accessory structures and would encompass many more potential arts uses. Other creative economy uses more typically associated with professional services, including architects and design professionals, should be subject to the same updated standards. In addition, the Zoning Working Group identified issues related to the use and/or renovation/expansion of garages for artist studios, and generally endorsed a more flexible approach to parking requirements and allowing arts uses in accessory buildings, provided that noise standards are met. The Parking Working Group is also taking up this issue.

Existing Creative Spaces

Beyond land use and zoning is the issue of actual development of creative facilities and venues within Washington, D.C.

Venues for visual arts and performing arts are numerous. The District has seen a substantial enhancement of its cultural facility base in the past few years with the development of the Harman Center for the Arts, the Gala Theater, the Studio Theater, and the renovation of Ford’s Theatre. In addition, the Arena Theater is in the process of building a major new home in the city. There is a total of 37 live performance theater venues in the city with a combined 19,000 seats, not including the 29 theaters at universities, museums, and other nonprofit venues that provide at least an additional 11,000 seats. In the visual arts, the city has about 140 galleries dispersed throughout the city, as well as many internal galleries in governmental and international facilities. There continue to be opportunities for developing additional performance venues including black box theatres and live music venues.

The supply of artist live-work space is relatively strong. Within the District, there are 202 housing units identified as specifically targeted to artists either completed or in the pipeline. (See Table 6 on page 66.) These projects are clustered in the 14th/U Street Corridor/Downtown, Southeast DC/Anacostia, and Brookland/Northeast DC. A number of these projects have included District financing and support. For example, the Department of Housing and Community Development is involved in the production of affordable artist live-work housing in Brookland, NoMa, and Anacostia. It should also be noted that a number of these projects are located outside of areas identified through current zoning as arts districts/overlays.

There is considerable expertise and interest in the private sector for developing artist housing and work space. A number of local and national developers, such as ArtSpace, understand the creative sector and have or plan to deliver a product for those consumers. In addition to the private development community, the city has access

to, and has partnered with, the Cultural Development Corporation, a nonprofit development corporation founded to build artist housing and work space in Washington and the region.

There are a number of nonprofit and community-based arts centers throughout the city and they are scattered throughout a number of neighborhoods. These include THEARC, a \$27 million, 110,000-square-foot, state-of-the-art cultural campus in Ward 8, the DC Arts Center in Adams Morgan, the Capitol Hill Arts Workshop, the Sitar Art Center, and the Millennium Art Center. Even with this supply of community arts centers, interviews suggest

unmet demand, particularly in northeast and southeast DC.

In terms of office space, Washington has one of the largest inventories in the nation, with over 112 million square feet as outlined in to the city's Comprehensive Plan. According to the Downtown BID, the city has had a relatively strong office market, adding on average more than two million square feet annually since 1998. Even with this growth, robust demand has led to office rents in downtown and the central business district among the highest in the U.S., making these areas relatively inaccessible to many small businesses in the creative industries.

TABLE 6: Artists Housing and Live/Work Developments in the District

NAME	ADDRESS	NEIGHBORHOOD	UNITS	DESCRIPTION	STATUS
MATHER STUDIOS	916 G STREET, NW	DOWNTOWN	12	12 out of 50 condos sold under market to artists	COMPLETED
THE STUDIO THEATER	1501 14TH STREET, NW	LOGAN CIRCLE	16	16 apartments, visiting artists and yearlong apprentices	COMPLETED
ARCH DEVELOPMENT	1706 16TH STREET, SE	ANACOSTIA	4	Free housing to artists	COMPLETED
LOREE GRAND - CUDC AND COHEN COS	3RD AND K STREETS, NE	NOMA	30	Affordable 1 and 2 bedroom apartment units	FIRST PHASE 2010
ARTSPACE/ DANCE PLACE	3225 8TH STREET, NE	BROOKLAND	41	41 affordable live/work units for artists	PLANNED
ARCH DEVELOPMENT	1642-1648 V STREET, SE	ANACOSTIA	8	8 units affordable at 60-80% AMI; studio space in basement	AVAILABLE 10/09
ARCH DEVELOPMENT	2025 FENDALL STREET	ANACOSTIA	17	17 units affordable at 60-80% AMI. Studio space in basement	COMPLETED
CUDC	2414 DOUGLAS STREET, NE	LANGDON	40	40 affordable live/work units for artists and families	PROPOSED
ART PLACE AND SHOPS AT FORT TOTTEN	FORT TOTTEN METRO STATION	FORT TOTTEN	34	34 affordable artist housing, 170,000 sq ft of cultural and arts spaces & children's museum	PROPOSED
TOTAL			202		

Source: Green Door Advisors & DC Department of Housing and Community Development

The development of a few incubator facilities has been helpful in providing specialized, lower-cost office and work space for startup businesses. Cultural Development Corporation operates an arts incubator that offers affordable arts and office space and strategic business services downtown. Also, the Affinity Lab in Adams Morgan offers entrepreneurial and small business incubation through its shared workspace concept; although not specifically dedicated to the creative sector, its members include several creative businesses. There is increased recognition of the importance of incubators

in the city, and there are efforts underway to consider additional incubator projects.

Creative Districts/Neighborhoods

The location of creative activity within the District has been shifting and reflects some of the larger neighborhood development changes. Some of the traditional centers for creative businesses retain relatively vibrant creative communities. Other strong creative neighborhoods lie beyond these established submarkets, however, with notable recent developments

FIGURE 4: Creative District Framework

	ESTABLISHED	MATURING	EMERGING: SHORT-TERM	EMERGING: LONG-TERM
CRITERIA	<p>Substantial creative activity within one or more industry classifications.</p> <p>Perceived by the marketplace as a destination for those uses.</p> <p>Functioning as a creative location for a significant period of time (10+ years).</p> <p>Have appropriate infrastructure (buildings, social networks, businesses) for creative uses.</p>	<p>More recent growth in creative uses.</p> <p>Key arts anchors that have established the area as an arts district.</p> <p>Supported by policy/planning for creative uses.</p> <p>Growing creative infrastructure (buildings, social networks, businesses).</p>	<p>Are not yet viewed as arts districts/destinations by the general marketplace.</p> <p>Have some aspects of required infrastructure (artists, buildings, businesses, social networks) but not all.</p> <p>Do not have policy/planning regulations in place to support arts-related uses.</p> <p>Opportunities for developing in a 5- to 10-year timeframe.</p>	<p>Are not yet viewed as arts districts/destinations by the general marketplace.</p> <p>Have some aspects of required infrastructure (artists, buildings, businesses, social networks) but not all.</p> <p>Do not have policy/planning regulations in place to support arts-related uses.</p> <p>Opportunities for developing in a 5- to 10-year timeframe.</p>
NEIGHBORHOOD	<p>GEORGETOWN</p> <p>CAPITOL HILL</p> <p>DUPONT CIRCLE</p> <p>DOWNTOWN</p>	<p>U AND 14TH STREETS</p> <p>H STREET, NE</p>	<p>ANACOSTIA</p> <p>FLORIDA AVENUE MARKET</p> <p>BROOKLAND</p> <p>NOMA</p>	<p>MT. PLEASANT</p> <p>RHODE ISLAND AVENUE, NE</p> <p>KENNEDY STREET, NW</p> <p>DEANWOOD</p> <p>SW WATERFRONT</p> <p>FORT TOTTEN</p> <p>CAPITOL RIVERFRONT</p> <p>NEW YORK AVENUE, NE</p>

including the U Street corridor and ongoing work on the H Street, NE corridor.

The redevelopment of H Street has been buoyed by the District's continued planning and revitalization investment efforts (Great Streets and others). The DUKE small area plan and H Street Corridor Revitalization plan are two examples of planning documents that provide support and guidance to the investment in and development of arts-related uses. The impact of the Uptown Arts Overlay and arts sub-area of the H Street Overlay can be seen in the developing creative uses within these two neighborhoods. The introduction of venues including the H Street Playhouse and Joy of Motion Dance Center contributes to the corridor's strengths. Creative spaces like the H Street Greenhouse, a shared-office facility, are also beginning to appear, particularly nearer to Florida Avenue. Along U and 14th streets, meanwhile, performance venues like The Source,

Studio Theatre, and Lincoln Theatre have acted as anchors to both the burgeoning arts district and anchors for the creative community.

Based upon stakeholder interviews and analysis of submarkets within the District, the neighborhoods in the District that either have an existing concentration of creative activity or have potential for creative activity were classified along a continuum in terms of future development potential. (See Figure 4 on page 67.)

Many of the identified neighborhoods have planning and policy documents such as Small Area Plans (SAPs) that provide a framework for supporting aspects of the creative economy in their neighborhoods. As proven by several recent successes in establishing creative neighborhoods, this framework can be a useful component to the maturation of these creative places. Additionally, potential development sites within many of these neighborhoods may serve to provide the

TABLE 7: Boutique Office Space in the DC Region

	1Q-2Q 2009	
WASHINGTON, DC	\$.SF	TOTAL RBA*
ANACOSTIA	\$29.84	132,823
H STREET, NE	\$30.95	159,420
NOMA	\$32.00	67,685
BROOKLAND, FORT LINCOLN	NA	102,354
FLORIDA AVENUE	\$26.61	108,857
MARYLAND	\$.SF	TOTAL RBA*
NATIONAL HARBOR, OXON HILL	\$18.55	79,548
SILVER SPRING	\$18.95	237,730
COLLEGE PARK	\$21.97	231,411
BRANCH AVENUE	\$22.24	119,515
CHEVERLY, HYATTSVILLE	\$22.88	285,739
VIRGINIA	\$.SF	TOTAL RBA*
FALLS CHURCH, BAILEY'S CROSSROADS	\$24.30	550,556
OLD TOWN ALEXANDRIA	\$27.60	1,540,798
EISENHOWER AVENUE	\$28.24	57,164

Source: CoStar, Green Door Advisors
RBA: Rentable Building Area

physical infrastructure to enhance the growth of these creative corners.²⁹

The Competitive Environment

In addition to traditional real estate factors such as safety and access to transportation and other amenities, there are several critical and sometimes competing characteristics identified by artists, creative enterprises, and developers as necessary for successful creative spaces. These factors include: affordability, appropriateness of product type, and aggregation of creative uses. Additionally, while DC is the regional center of fine arts and performance, it competes with neighboring jurisdictions for office space, industrial/flex space, and artist housing.

Interviewees and focus group members indicated that Falls Church, Arlington, and Old Town Alexandria in Virginia, and Silver Spring, Hyattsville, and Mount Rainier/Route One Corridor (including Hyattsville) in Maryland,

have become arts and creative economy hubs. Performing art centers, galleries, and artist live-work space and production space have mushroomed there. In addition, Baltimore has begun to attract artists and other young creatives seeking affordable live and work space. This new creative economy development signals that, in some instances, the District has become prohibitively expensive or otherwise less attractive for artists and creative enterprises, and suggests that these other communities are becoming preferred alternatives to the District as locations to do creative work.

An examination of the most common commercial spaces needed by those working within the creative economy, “boutique/small” office space (10,000 square feet and less) and warehouse/flex space, indicates that the District offers some well positioned neighborhoods that have both the product type and comparatively affordable price points for the creative sector uses. A

TABLE 8: Warehouse Flex Space in the DC Region

		1Q-2Q 2009	
WASHINGTON, DC		\$.SF	TOTAL RBA*
ANACOSTIA		\$8.24	113,830
H STREET NE		\$12.50	26,986
NOMA		\$12.94	266,444
BROOKLAND, FORT LINCOLN		\$7.82	1,480,122
FLORIDA AVE		NA	103,023
MARYLAND		\$.SF	TOTAL RBA*
NATIONAL HARBOR, OXON HILL		\$10.25	160,982
SILVER SPRING		\$9.82	581,480
COLLEGE PARK		\$11.52	354,699
BRANCH AVENEUE		\$10.66	805,643
CHEVERLY, HYATTSVILLE		\$6.82	2,396,489
VIRGINIA		\$.SF	TOTAL RBA*
FALLS CHURCH, BAILEY’S CROSSROADS		\$25.00	369,437
OLD TOWN ALEXANDRIA		\$12.60	537,217
EISENHOWER AVENUE		\$13.50	337,028

Source: CoStar, Green Door Advisors
RBA: Rentable Building Area

number of these locations are also Metro accessible and are emerging as centers for aggregated arts uses.

Table 7 (see page 68) compares office space within DC’s emerging arts neighborhoods and regional arts locations. Generally, DC’s office rents are higher than those found in the surrounding suburban locations, though Florida Avenue Market remains regionally competitive for boutique office space. Table 8 (see page 69) identifies the warehouse/flex space available in these same neighborhoods that are, or could be, used as production space for a variety of creative industries. Anacostia and Brookland are two submarkets that are well positioned within the regional marketplace.

While there are some District neighborhoods that are well positioned, in general, inner suburban Maryland offers a substantial value for both small office users and warehouse/flex space that may be attractive for creative space users. The availability and pricing of appropriate arts commercial and production space are unique to each submarket; while some can compete regionally on price (e.g., Florida Avenue, Anacostia, Brookland),

other locational characteristics such as accessibility and aggregation of uses will be important to attract value-oriented users.

Maryland and Virginia offer a number of incentives and programs targeted at increasing the affordability and accessibility of creative spaces for artists. (See Figure 5.) Maryland has created a unique arts community designation that is coupled with the tax credit tools highlighted below.

Finally, the surrounding communities have increased capacity to develop creative districts and are launching projects that could compete directly with activity in the District. For example, the Gateway Community Development Corporation serving North Brentwood, Brentwood, and Mount Rainier, has been developing the Gateway Arts District, a \$70 million initiative that includes artist live-work space, an arts center, and a range of other creative uses. In Fairfax County, the former Lorton Correctional Facility is being redeveloped as the Workhouse Arts Center.

FIGURE 5: Arts Regulatory and Financial Incentive Tools

TOOL	MARYLAND	VIRGINIA
TAX CREDITS	10-year property tax credit for new construction or renovation on buildings that provide live-work space for artists or arts and entertainment enterprises. Income tax subtraction modification for income from artistic work.	Property tax credits on rehabilitation, renovation, or replacement of property. Three-year exemption from Business, Professional and Occupational License (BPOL) fees.
OTHER FINANCIAL	Arts in Communities grants to nonprofits that produce or present art.	The Virginia Commission for the Arts includes grant funding for arts organizations and artists.
ZONING	MNCPPC — “Transit Village” zoning designation was created in 2006 to allow townhome live-work units if at least 40 percent of the gross floor area is used for residential purposes.	Arts and Cultural District Program includes flexible zoning that allows artists to live, work, and sell art in the same building.

Challenges

INCENTIVE STRUCTURES IN THE ARTS OVERLAY DISTRICTS

Interviewees and the Zoning Working Group noted that the inclusion of non-arts uses in the preferred uses requirement undermines the intent of creating actual arts spaces, or encouraging the concentration of arts spaces. While the Downtown Overlay requires 0.25 FAR for arts uses, the Uptown ARTS Overlay and the H Street sub-district do not require any minimum of arts uses. This issue seems to be of particular concern to the artist community when developers receive bonuses for non-arts uses. In particular, there is concern in the Uptown ARTS Overlay District that restaurants are taking up too many of the arts-related spaces. Conversely, it is also a concern for developers, property owners, and artists along the 14th Street, NW corridor where ground floor space reserved for retail or arts uses sits vacant and serves to deaden the streetscape. While it is critical to ensure creative spaces are being utilized for intended purposes, there must also be clarity for all stakeholders regarding allowable uses.

SUPPLY OF ARTIST LIVE-WORK SPACE

Despite a large level of demand and considerable expertise in the District in developing such space, challenges persist in developing affordable artists' housing. Interviews with developers indicated misgivings within some neighborhoods at the policy of targeting affordable housing specifically to artists when citywide need for affordable housing remains significant. Several projects have stalled or have been cancelled due to community resistance. The existing artists' housing and work space/studios are scattered throughout the city and do not meet the scale of need in the sector. In the current development environment, however, it is difficult to put together a deal to provide reasonably priced artist live-work space. Affordable housing for artists is challenged by many of the same considerations that hamper any affordable housing effort: lack of sufficient resources, relatively high costs of land/construction, and too few suitable sites that offer sufficient scale.

OFFICE SPACE FOR COMMERCIAL CREATIVE BUSINESSES

Since the creative sector is dominated by freelancers and small businesses, this sector has significant demand for smaller, more affordable workspaces. The development of a few incubator facilities in DC has been helpful in this regard, but has not met the potential demand for this type of space.

COMPETITION FROM SURROUNDING COMMUNITIES

The District is facing considerable competition from surrounding communities for a wide variety of creative businesses and venues, as well as for individual artists. The District competes with suburbs like Alexandria, Arlington, Mt. Rainier, and Hyattsville, as well as nearby cities like Annapolis and Baltimore, to attract creative firms and artists. Not surprisingly, these competitors feature space that is generally more affordable than what the District can offer, and some are transitioning to urban-like environments, with amenities and transit accessibility. Moreover, they offer designated arts districts, where regulatory and financial incentives have been crafted to create strong concentrations of arts users and facilities, including affordable housing. (See Figure 5.) Competing successfully for these businesses and individuals is critical if the District is to expand its creative economy.

PRESENCE OF CREATIVITY IN THE NEIGHBORHOODS

Arts and creative economy activity in some low- and moderate-income neighborhoods is strong in some ways, but much more could be done. Some of the creative work in the neighborhoods is undervalued and poorly integrated into the mainstream arts community. Musicians, artists, and arts organizations all noted the lack of multidisciplinary arts centers that could provide production space, exhibition space, and instruction for youth. There are also few venues for people under the age of 18 to listen to live music. As a consequence, the music industry loses out on a revenue-generating opportunity. Finally, though some of the abandoned buildings, vacant lots, and closed schools in the city's neighborhoods

CHICAGO SPACE FINDER

Chicago Artists Resource (CAR) is an arts service website that provides information and resources on a wide range of issues related to artists' creative and professional practice. Designed by artists for artists, with help from several national collaborators, CAR utilizes open-source software to connect artists with local, national, and international resources. One of the most important site features is Spacefinder, which provides an online posting of sites available for purchase or rent that are relevant to creative users. CAR also published *Square Feet Chicago: The Artist's Guide to Buying and Leasing Space*. This resource guide includes interactive maps that highlight cultural features as well as real estate values for each of Chicago's 77 neighborhoods. Artists can find explanations on every aspect of real estate from establishing credit, the mortgage process, and finance and ownership options, to zoning and code issues and home inspections. CAR is supported and administered by Chicago's Cultural Department.

provide opportunities for developing cultural activities, the resources and/or development capacity of neighborhood/arts organizations are often insufficient to successfully redevelop these assets.

REGULATORY ENVIRONMENT

Many creative businesses interviewed noted that while significant improvements have been made, the District is still viewed as an unfriendly place to start and grow a business. Fees and the permitting process, in particular, are seen as onerous and challenging, particularly for small enterprises. The experience of Washington Glass School is viewed as a symbol of a missed opportunity; despite efforts to retain it, the school was not able to find a suitable location in the District and, as a consequence, the school moved to a site in Mount Rainier. Current regulations related to home-based businesses also have

a negative impact on homeowners involved in arts and cultural uses.

VACANT LAND AND BUILDINGS

Throughout Washington, DC are vacant lots, vacant buildings, and unoccupied ground floor spaces. These vacancies have a negative impact on the neighborhoods and are an underutilized asset in the city's creative economy. Along 14th Street, NW, for example, necessary zoning, building code, and parking allowances could encourage temporary use of space for gallery displays, performances, etc. The reuse of space in decommissioned schools or other community buildings is generally governed by the underlying zoning. For example, reuse of a school or church in a residential district for an arts or cultural use generally requires a use variance.

THE APPROACH TO CREATIVE/ART DISTRICTS

Interviews with artists, developers, and others concerned with the establishment and ongoing support of arts districts in Washington, DC focused on several key themes:

- Creative/Art districts should reflect the geographical diversity of the city, but should also provide opportunities for the concentration of artists and creative uses.
- Creative/Arts districts should be established where an organic demand for them exists, rather than making arbitrary designations that are inauthentic and less likely to succeed.
- Creative/Arts districts require support from all facets of the public, private, and nonprofit communities. This means genuine neighborhood support for the arts, support across governmental agencies, and nonprofit or other organizational support for these districts.
- Human capital and financial assistance should be prioritized and targeted to promote the effective and efficient deployment of public resources.

Strategies for Success

STRATEGY: Better connect creative entrepreneurs and businesses to sites within the District

ACTION STEP: Organize a creative ‘spacefinder’ initiative that provides information on the availability and location of creative spaces throughout the city, and matches creatives in need of space with property owners, developers, and brokers. Matching strategies could include in-person forums as well as a web-based tool that acts as a clearinghouse of information. (See sidebar example)

ACTION STEP: Offer a toolbox and technical assistance program to provide better understanding among artists and creative businesses of real estate regulations and processes, leases, financing and related resources.

STRATEGY: Promote creative uses in development

ACTION STEP: Coordinate opportunities for the development of affordable artist housing and live-work space, and provide public sector assistance as appropriate (for example, via public-private partnerships, financing, land dispositions, and zoning support).

ACTION STEP: Identify specific zoning changes that could be used to further support and grow creative places / districts.

ACTION STEP: Promote creative uses (e.g., artist housing, studios) in the reuse of city-owned assets, such as underutilized and vacant properties.

ACTION STEP: Ensure that the findings of the *Creative DC Action Agenda* inform future small area planning processes and encourage specific creative uses/clusters in different districts, for example, culinary arts in the Florida Avenue Market; media arts in NoMA; heritage and arts in Anacostia; performing arts on H Street, NE; visual arts on 14th and U streets, and Brookland.

ACTION STEP: Investigate tools that would promote the clustering of creative uses and districts. This could include financing tools and public-private

TAX CREDITS FOR ART DISTRICTS

The Maryland Arts and Entertainment Districts program provides financial incentives to participating districts. Existing districts include Annapolis, Bethesda, Salisbury, Downtown Frederick, the Gateway Arts District, Silver Spring, Station North, and Wheaton. The program includes a 10-year property tax credit for new construction or renovation on buildings that provide live-work space for artists or arts and entertainment enterprises, income tax subtraction modification for income from artistic work sold by qualifying resident artists, and exemption from the admissions and amusement tax.

Virginia has authorized six localities to establish Arts and Cultural Districts, including Falls Church, Charlottesville, Harrisonburg, Petersburg, and Winchester, as well as the town of Chincoteague. To date, only Harrisonburg has established a district. The Arts and Cultural District program provides property tax credits for rehabilitation, renovation, or replacement of property (up to the amount of increased taxes resulting from property upgrades), an admissions tax exemption, and a three-year exemption from Business, Professional and Occupational License (BPOL) fees. The Arts and Cultural District program also includes grant funding for arts organizations and artists and flexible zoning that allows artists to live, work, and sell art in the same building.

partnerships such as enhanced coordination with neighborhood BIDs and Main Street programs in support of creative, cultural, and arts uses. (See sidebar example on page 73.)

STRATEGY: Activate vacant sites with creative, retail, entertainment, and other temporary uses

ACTION STEP: Implement a targeted “Temporary Urbanism” program that activates vacant and underutilized space on a temporary basis with creative uses. Efforts include identifying publicly- and/or

privately-owned sites for creative temporary uses and investigate funding opportunities.

ACTION STEP: Provide technical assistance to property owners to help them make use of sites on a temporary

basis. Assistance could be in the form of site review and design, support for streamlined application and permitting processes, and matching creative users to available space through a clearinghouse system.

Implementing the Action Agenda Immediate Priorities

To create momentum for this activity, District agencies, in partnership with the Washington, DC Economic Partnership and other key private and nonprofit stakeholders, should play a leading role by spearheading the immediate action projects

The body of the *Creative DC Action Agenda* offers a full set of goals, strategies, and action steps that the public sector, private sector, and nonprofit creative community can pursue over the next several years in the ongoing, long-term process of strengthening the creative economy. But to create momentum for this activity, District agencies, in partnership with the Washington, DC Economic Partnership and other key private and nonprofit stakeholders, should play a leading role by spearheading the immediate action projects outlined below. These measures were selected from the longer list of actions detailed above on the grounds that they can be implemented in the short term and can help lay the foundation for some of the longer-term strategies and action steps.

- Ensure that the findings and recommendations of the *Creative DC Action Agenda* are linked to other city planning and investment activities (e.g., DCCAH's strategic plan, neighborhood revitalization efforts, zoning update, Great Streets, and NIF) in order to leverage resources related to priority projects.
- Coordinate a coalition of private, nonprofit, and public

sector stakeholders to work collectively to move the Action Agenda forward.

- Support networking opportunities within creative industry segments (e.g., music, theatre, museum, digital arts) as well as across segments that bring together the business community, creative enterprises, and nonprofit cultural institutions more regularly to discuss potential strategic partnerships.
- Increase visitor awareness of DC's creative assets by enhancing the visitor information system. Efforts could include rethinking the location and operation of the visitor center(s) in the city, placing kiosks in the neighborhoods, and more effectively coordinating cultural calendars.
- Coordinate with stakeholders from the green, retail, and creative industries to make progress on immediate synergistic projects that leverage public, private, and nonprofit resources and partnerships.
- Organize a creative 'spacefinder' initiative that provides information on the availability and location of creative spaces throughout the city, and matches creatives in need of space with property owners, developers, and brokers. Matching strategies could include in-person forums as well as a web-based tool that acts as a clearinghouse of information.
- Implement a targeted program that activates vacant and underutilized space on a temporary basis with creative uses. Efforts include identifying publicly- and/or privately-owned sites for creative temporary uses and investigating funding opportunities.
- Coordinate opportunities for the development of affordable housing and live-work space, and provide public sector assistance as appropriate (for example, via public-private partnerships, financing, land dispositions, and zoning support).

ENDNOTES

- 1 Helen Hayes Awards Attendance and Production Figures for the 2007 Calendar Year and Helen Hayes Awards 2009 Program Statistics.
- 2 “Top Art Destinations,” *AmericanStyle Magazine*, 2009. <http://www.americancraft.com/americanstyle/>
- 3 A complete methodology for this report, including the industries and occupations included in the analysis, the sources of data, and the community input process, is included as an Appendix to this report.
- 4 Maria Puente, “Washington is morphing into a pretty cool district.” *USA Today*. June 18, 2009
- 5 A full list of the industries included in the definition of the creative sector in Washington, DC is included in the Appendix.
- 6 *District of Columbia Green Collar Jobs Demand Analysis Final Report*, February 2009. AeA Cyberstates 2008 Report.
- 7 For the purposes of this report, the definition of the Washington Metropolitan Statistical Area (MSA) that is being used includes the District of Columbia and parts of the states of Maryland, Virginia, and West Virginia. The region includes the Washington–Arlington–Alexandria, DC–VA–MD–WV Metropolitan Division and the Bethesda–Gaithersburg–Frederick, MD Metropolitan Division, consisting of Montgomery and Frederick counties.
- 8 Culinary employment includes the full range of employees working for full-service restaurants and caterers including chefs, servers, etc. This is in keeping with any sector analysis that includes all of the occupations in a particular industry. As noted, the culinary segment was limited to locally-owned, full-service restaurants, caterers, and specialty shops.
- 9 Markusen, Ann and Greg Schrock, “The Artistic Dividend: Urban Artistic Specialization and Economic Development Implications,” *Urban Studies*, Vol. 43, No. 10, September 2006.
- 10 Data on occupations are from EMSI Occupational Report.
- 11 Destination DC.
- 12 *Art & Economic Prosperity III: The Economic Impact of Nonprofit Arts and Cultural Organizations and Their Audiences in Greater Washington*. Americans for the Arts, 2007.
- 13 Cortright, Joseph, Impresa Consulting, *The Young and Restless in a Knowledge Economy*. CEOs for Cities, December 2005.
- 14 Washington Business Journal, July 22, 2009.
- 15 “Critical Links: Learning in the Arts and Student Achievement and Social Development”, Richard Deasy editor, AEP 2002.
- 16 Horowitz, Dr. Rob and Dr. Dan Serig. “Program Evaluation: DC Arts and Humanities Education Collaborative.”
- 17 Destination DC, 2007 Data on Tourism Industry in Washington, DC.
- 18 Based on total expenses for 50 museum and heritage nonprofits from *Guidestar*. Not included in this are the private museums and historic sites and museums embedded in other larger nonprofits such as National Geographic, Dumbarton Oaks (part of Harvard), etc.
- 19 In August 2009, the Chamber of Commerce announced it would be closing the one visitor center located in the Ronald Reagan Building and International Trade Center. It is currently looking for a new location for its visitor center.
- 20 Mt. Auburn database based upon IRS 990 submissions of nonprofit cultural institutions.
- 21 Helen Hayes Awards Attendance and Production Figures for the 2007 Calendar Year and Helen Hayes Awards 2009 Program Statistics.
- 22 Helen Hayes Awards Attendance and Production Figures for the 2007 Calendar Year and Helen Hayes Awards 2009 Program Statistics.
- 23 Project for Excellence in Journalism, “The New Washington Press Corps: A Special Report,” February 10, 2009.
- 24 Mt. Auburn database based upon primary research.
- 25 As a result of fiscal pressures, there have been further cutbacks in the earmarks for special projects provided to arts and culture organizations and projects. Final figures for FY 2010 will probably be below that reported in the initial DC 2010 Budget.

26 In addition to these larger support organizations, multiple industry associations serve the architectural industry, the graphic design industry, the fashion industry, and the media industry. A more complete description of these resources is provided in the Appendix.

27 *Greater Washington 2009 Regional Report*, Greater Washington Initiative.

28 A complete inventory of postsecondary training programs at nonprofits and colleges and universities is included in the Appendix.

29 An Appendix to this report provides an overview of the synergies between each of these neighborhoods and the SAP recommendations, as well as potential developable sites.

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