Greater Milwaukee Film Industry

Cluster Analysis and Action Plan

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Executive Summary

Greater Milwaukee[1] is home to a dynamic emerging film industry[2], and the region has many of the key assets needed to support its development into a significant economic cluster. The region's diverse industry has been rapidly maturing and growing in recent years, it is home to a number of excellent film-related educational institutions including the highly rated and longstanding film program at UWM, and the Milwaukee Film Festival is booming. With ever-increasing demand and new distribution channels for video content, the film industry has the potential to become a significant driver of economic and cultural value in the region.

At the same time, the region's industry faces a range of challenges to achieving its fullest potential. The industry has historically been highly siloed across media type and organizational locus, with a lack of connectivity between professionals working in corporate media, advertising, gaming, and as independent filmmakers. This lack of cohesion has limited the synergistic benefits of collaboration. Additionally, there are specific gaps in key supportive systems related to financing, education, and government policy that further constrain industry growth.

In 2015, a diverse coalition of stakeholders came together with the goal of better understanding the nature of Greater Milwaukee's film industry and developing a collaborative action plan to support the growth of the industry and help it achieve its greatest economic and cultural potential. To that end, the coalition—referred to here as FILM Milwaukee—engaged ICF to conduct an assessment of the industry and its key supporting foundations, and to facilitate the development of a film industry action plan. This report summarizes the findings of ICF's analysis and presents the preliminary action plan that was generated during a day-long collaborative workshop on November 17, 2016.

Study Approach

ICF's assessment drew from three sources of data: (1) federally collected industry and economic data; (2) a survey of regional industry stakeholders; and (3) interviews conducted on-site and by phone. ICF's Milwaukee Film Survey was launched on August 30, 2016 and closed on October 10, 2016. During the survey's 6-week duration, it received a total of 767 responses. Survey responses were used to generate an initial assessment of the industry and its growth trends which were further developed and validated by analysis of industry data, interviews, and group discussions during the Action Planning Workshop.

To analyze industry (NAICS-code based) and occupation (SOC-code based) data, ICF utilized the EMSI tool which aggregates government labor information. ICF assessed industry and occupation trends over the 10-year period from 2006 through 2015, but most of the analysis reported here focuses on the past five year period, 2010-2015, in order to highlight more recent trends.

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[1] The Greater Milwaukee region, also referred to as the M7 region, includes Kenosha County, Milwaukee County, Ozaukee County, Racine County, Walworth County, Washington County, and Waukesha County.

[2] This study employs the term "film industry" to refer to the broad range of creative media businesses extending across film, video television production, digital production, and multimedia. See appendix B for full list of industry sectors included in industry analysis.

Members of the ICF team conducted three site visits to Milwaukee during the course of the project. The first site visit helped provide a baseline understanding of film activity in the region through interviews with key stakeholders. ICF's second site visit, which occurred in late September 2016 to coincide with the activity surrounding the Milwaukee Film Festival, was used to vet initial findings and conduct additional qualitative research. Finally, ICF returned to Milwaukee in November 2016 to facilitate the Action Planning Workshop.

As a supplement to this report, ICF was also engaged to assess the economic impact of the Milwaukee Film Festival. To conduct this assessment, ICF used the IMPLAN model, a tool widely used by state agencies in the Midwest and throughout the country. The analysis assessed the effects of the festival's operational expenditures and audience spending during the 15 day event, including spending at restaurants and bars, spending on transportation around town, non-festival entertainment spending (e.g., Milwaukee museums or historical sites), and out-of-town guests' spending on lodging. The analysis provides estimated impacts for each of these spending profiles (operational expenditures, in-region attendees, and out-of-town attendees), as well as an overall estimate of the Milwaukee Film Festival's 2016 impact on the state economy. The analysis concluded that the 2016 Milwaukee Film Festival sparked enough economic activity to support $4.9 million of industry activity in Wisconsin, created nearly 60 jobs, and generated $291,000 of Wisconsin state and local tax revenue.

Key Findings of the Industry Analysis

There is great enthusiasm among members of the Greater Milwaukee film industry, and a strong consensus that the region has a robust talent pool and momentum for continued growth. According to industry data, in 2014 the film industry produced over $1.55 billion in annual sales and generated over $530 million in labor income within the Greater Milwaukee region. Survey respondents and stakeholders interviewed throughout the analysis highlighted the industry's dynamism and its importance to the growth of the region's broader creative economy.

In 2015, there were approximately 14,600 jobs in the Greater Milwaukee film industry cluster.[3] While this number appears relatively small, this is roughly the same size as the region's management, scientific and technical consulting services industry and nearly five-times the size of the region's famed beer manufacturing and distribution industry which has roughly 3,000 jobs. Furthermore, film industry employment grew by an impressive 10 percent from 2010 to 2015; a rate that is double the growth rate for overall employment in the region during that time. In addition to size and growth, concentration is also a key measure of an industry's competitive position. The Milwaukee film industry has a location quotient of .64, which is indicative of an industry that is less concentrated than the national average and is likely locally-serving versus export-oriented.

[3] It should be noted that the employment figures cited in this report are almost certainly an undercount of actual industry activity, as federally-collected data only capture those people employed within explicitly film-related firms and do not capture in-house creative workers who are employed by firms outside of the film industry, such as banks, insurance companies, retailers, etc. These figures also do not capture activity that does not constitute someone's primary source of income. According to the ICF survey, one-quarter of film creative survey respondents are engaged in film-related activity outside of their primary source of income, meaning they don't show up in industry data. Furthermore, 55% of survey respondents indicated that are active in film-related activity beyond formal work or school activities, and this activity is also not captured in these figures.

Sector-specific analysis was used to highlight sectors within the overall film industry that are more competitive in the region. While its concentration hovers just around average, the Independent Artists, Writers and Performers sector has roughly 7,000 employees (nearly half of the region's total film industry employment) and a robust growth rate of 10 percent. Other sectors that are growing and have average or above average concentrations include: Advertising Agencies; Photography Studios; Other Sound Recording Industries; and Television Broadcasting.

While industry data focuses on the business establishments engaged in film-related activity, occupation data provides another approach for evaluation by highlighting the individuals who are engaged in film-related activities even if they are embedded within traditional industries. The majority of the region's film-related occupation sectors are growing, and there are several significantly sized occupations that have average or above average concentrations, such as Film and Video Editors, Camera Operators, Broadcast Technicians, Advertising Managers, and Art Directors.

There are several strategic implications that can be drawn from these findings. Firstly, because independent artists constitute such a significant portion the region's industry, initiatives that explicitly reach out to these independent professionals and strengthen network linkages between them and key regional institutions will be critical to sustain industry growth. Secondly, regional strategies should be built around the sectors of existing strength and competitive advantage. Developing a robust non-local (i.e., export) market around these capacities will help establish the Milwaukee region's reputation as well as a nascent client base to sell broader offerings across the value-chain. Finally, special attention should be paid to those sectors that might be core to sustaining the industry's growth that currently have low concentration or stagnant growth. Reaching out to stakeholders within these weaker sectors and determining what support they might need to promote their growth should be a strategic priority.

Key Findings of the Foundation Assessment

The region's film cluster is undergirded by a set of economic foundations—key inputs—that can either support or impede industry growth. ICF's study assessed five key foundations that are critical to the future growth of Greater Milwaukee's film cluster: funding and investment; government policy and regulation; workforce, skills, and education; networking; and organizational infrastructure. Drawing on stakeholder insights conveyed through the survey, individual interviews, and group discussions at the November 17th workshop, ICF assessed the key assets and challenges in each of these foundations and began identifying potential strategic actions to strengthen them. A summary of these findings is presented below.

- **Funding and Investment:** Overall, funding and investment is seen as an area of challenge by many film industry stakeholders—a weak foundation in need of support to enable future industry growth and competitiveness. While stakeholders identified a number of important assets in the region, including a comparatively low cost of doing business, high enthusiasm for funding films, and an increase in access to local funding (notably, through the Brico Forward Fund which provides funds local, independent filmmakers), respondents generally believed that access to funding and investment for film-making activities is a challenge in the region. There was a widespread desire expressed to increase access to sustainable funding for local filmmakers, local film projects, and local film businesses.

- **Government Policy and Regulation:** Laws, regulations, and government policies can either enable or impede growth of the region's film industry. While Milwaukee's relatively small bureaucracy is seen as an asset for expediting productions and "cutting through red tape", regional film industry stakeholders felt that there is a general lack of government support for the film industry, and they articulated a number of significant policy issues that constrain industry growth. There is broad consensus that the current lack of film incentives makes it difficult to attract large-scale film productions to the region, and there were broader calls for improving the tax code and regulatory environment to better support the region's growing film cluster.

- **Workforce, Skills, and Education:** While the region has a strong pool of local filmmaking talent, film crews, and production companies, there were several specific gaps identified in the local workforce, including a limited pool of well-skilled editing teams, limited access to on-set crew depth, and a broader lack of diversity in the film-related workforce. There is also a widespread perception that it is extremely difficult to retain young talent in the Greater Milwaukee region, because the limited size of the local market leads talented young professionals to seek employment in larger markets. The region boasts a wealth of excellent post-secondary educational programs and has historically had a very strong film-related skills pipeline. However, a wide range of stakeholders observed that shortages in funding for both K-12 and post-secondary programs limits their offerings and threatens this competitive advantage of the region.

- **Networking:** Access to physical, virtual, and cultural resources that enable networking and collaboration are critical to the continued growth and success of Greater Milwaukee's film industry. Stakeholders felt the region generally has a strong collaborative culture and that the Milwaukee Film Festival is a particularly valuable regional asset that facilitates collaboration, builds credibility with investors, and raises the visibility of the industry beyond the region. That said, there were a number of important challenges identified related to both local and external networking. On the external side, stakeholders indicated that the region's relationships with other national film hubs should be better nurtured. And, in terms of local networking, stakeholders shared a broad consensus that there is a lack of diversity within the local film community and that more resources—and ideally a physical space—are needed to enable ongoing networking and collaboration among cluster members.

- **Organizational Infrastructure:** ICF's research found that existing film/arts organizations in the state are not sufficiently focused on the activities taking place in the Greater Milwaukee region, and that there has thus far been a lack of unifying vision or strategy around which to build an industry coalition. While Milwaukee Film has thus far played an important role in gathering members of the industry and helping to advance their interests, many stakeholders expressed the need for additional organizational infrastructure within the region for convening the broader members of the industry cluster, communicating and advocating for their shared interests, and supporting the implementation of strategic cluster initiatives. In the remainder of this report, this future cluster coordinating organization, which has yet to be formally named and constituted, is referred to as "FilMKE."

Action Planning

On November 17, 2016, over 65 stakeholders came together for an all-day workshop to refine and validate ICF's preliminary analysis of the region's film industry and foundation strengths and weaknesses, and to collaboratively develop strategic goals and a range of concrete actions to enhance the competitiveness of Greater Milwaukee's film industry by building on the region's existing assets and overcoming key challenges in each of the foundation areas.

ICF facilitated a group brainstorming process through five stages of strategic planning: (1) shaping an industry vision statement; (2) articulating shared strategic goals; (3) brainstorming a wide range of potential strategic actions; (4) prioritizing among those potential actions; and (5) developing preliminary task-level details for selected priority actions.

The draft vision statement that flowed out of this process, and the organizational mission statement that was drafted to support it, are reproduced below.

Vision: To make Milwaukee an internationally recognized center of media culture, commerce, and technology.

Mission: To support all forms of media, television and filmmaking, both artistic and commercial, from Milwaukee to the world and from the world to Milwaukee. We strive to grow and sustain a diverse and vibrant creative community of storytellers through building an industry infrastructure that advances advocacy, education, and financial support.

The key outputs of each of the eight breakout group discussions are summarized in Section 5 of this report, and Appendix D documents the full outputs from each group. A summary of the 24 potential priority actions generated by stakeholders is presented below:

Summary of Proposed Priority Actions

Foundation Topic	Priority Actions
Funding and Investment	1. Create a fund for films 2. Increase distributor access/awareness 3. Enhance funder-filmmaker connectivity
Government Policy and Regulation	4. Create council for future coordinating organization (e.g., FilMKE) 5. Evaluate tax/subsidy climate for film and make recommendations 6. Obtain Wisconsin Economic Development Corporation (WEDC) funding to support growth of Milwaukee's film cluster
Workforce and Skills: K-12 Education	7. Develop communications plan to inform and underscore benefits of film education to key donors (both private and public) 8. Identify specific organizations and locations (see also, "hub") to facilitate professional development and strengthen network 9. Increase student exposure through partnerships, mentorships and collaboration
Workforce and Skills: Higher Education	10. Launch political activism to support higher education programs in film production 11. Engage philanthropic support for endowed positions and scholarships 12. Establish film as a city priority and align education to that priority

Foundation Topic	Priority Actions
Workforce and Skills: Professional Development	13. Take industry professionals into more schools to teach about industry, technology, and jobs 14. Support visiting industry professionals, master classes, and workshops 15. Define the demand/potential for industry and communicate that to regional and other audiences
Networking: Local	16. Expand networking events 17. Create physical space/hub 18. Expand internships and mentorships
Networking: External	19. Establish digital presence for Milwaukee's film community (branded online hub) 20. Bring streaming services, cable networks, distributors, and producers/investors to Milwaukee for networking 21. Develop deeper ties with NY, LA, international hubs
Organizational Infrastructure	22. Determine identify and leadership 23. Secure sustainable funding 24. Establish creative virtual space and physical spaces

Next Steps

The November 17th Action Planning Workshop generated a wide range of ideas for potential actions that could be pursued by the emerging film cluster coalition, and it demonstrated that there is a huge amount of enthusiasm, energy, and desire for collaboration among stakeholders. The challenge now will be to focus energy on those actions that will be most impactful and achievable, and to channel the enthusiasm into sustained action. This will require concerted effort in three areas: (1) establishing mechanisms for coordination, leadership, and communication; (2) conducting additional research and analysis; and (3) further developing and implementing agreed priority actions.

- **Coordination, Leadership, and Communication:** In order to sustain the strong momentum that has already been established in this collaborative initiative, organizational mechanisms for coordination, decision-making, and communication should be formalized in early 2017. This will involve forming action teams to spearhead priority actions in each of the foundation areas; establishing an organizational structure to help coordinate and track implementation of those various actions; and defining leadership for the overall initiative to facilitate decision-making, fundraising, and advocacy.

- **Additional Research, Analysis, and Support:** Several influential stakeholders observed that there are a number of topics outside the scope of this present study that should be studied in order to further support the successful implementation of strategic actions. Topics proposed for additional analysis and support include:
  - Quantifying the economic impacts of the region's film industry in terms of output (GSP) and tax revenue in order to better articulate the industry's value to the region;
  - Occupational wage analysis;
  - Additional research on critical financial/regulatory issues, e.g., tax incentives, tax code.

- Case studies of successful peer regions' efforts to develop their film cluster;
- Explore potential synergies with other regional efforts (e.g. Radio Milwaukee); and
- Provide additional facilitation support to aid ongoing refinement and launching of key activities.

- **Development and Implementation of Priority Actions:** The most critical component of this initiative will be the successful implementation of key actions that have concrete and measurable impacts on the region's film industry and community. To achieve this: (1) coalition leadership will need to select a few priority actions for early implementation; (2) action teams will need to flesh out detailed task-level plans and launch implementation; and (3) and coordinating organizations (e.g., FilMKE) should monitor implementation progress, evaluate effectiveness using agreed metrics, and correct course as needed.

1. Introduction

Greater Milwaukee[4] is home to a dynamic emerging film industry[5], and the region has many of the key assets needed to support its development into a significant economic cluster. The region's diverse industry has been rapidly maturing and growing in recent years, it is home to a number of excellent film-related educational institutions including the highly rated and longstanding film program at UWM, and the Milwaukee Film Festival is booming. With ever-increasing demand and new distribution channels for video content, the film industry has the potential to become a significant driver of economic and cultural value in the region.

The increasing dynamism of the local film community will not only generate jobs and additional economic activity within directly relevant creative sectors, it can also add value to local firms in traditional non-media sectors by providing services such as the creation of commercial videos, multimedia web content, and social media marketing. In fact, the region already benefits from synergies between the commercial and creative film spheres, with many young professionals finding employment within traditional firms' creative departments and simultaneously pursuing their more artistic filmmaking activities outside of their primary source of income.

Beyond its direct economic value, the local film industry contributes importantly to Greater Milwaukee's cultural identity and, increasingly, to its reputation. Film and the arts are an integral part of the region's sense of itself, and can provide an important bridge for communication and connection, both across segments of the local community and outward, connecting the region to the world. As the Greater Milwaukee film industry continues to grow, mature, and increase in cultural density, it can help strengthen the visibility and reputation of the region and, in turn, attract a creative young workforce seeking a culturally rich, dynamic community.

At the same time, the region's industry faces a range of challenges to achieving its fullest potential. The industry has historically been highly siloed across media type and organizational locus, with a lack of connectivity between professionals working in corporate media, advertising, gaming, and as independent filmmakers. This lack of cohesion has limited the synergistic benefits of collaboration. Additionally, there are specific gaps in key supportive systems related to financing, education, and government policy that further constrain industry growth.

In 2015, a diverse coalition of stakeholders came together with the goal of better understanding the nature of Greater Milwaukee's film industry and developing a collaborative action plan to support the growth of the industry and help it achieve its greatest economic and cultural potential. To that end, coalition members engaged ICF to conduct an assessment of the industry and its key supporting foundations, and to help facilitate the collaborative development of the film industry's action plan.

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[4] The Greater Milwaukee region, also referred to as the M7 region, includes Kenosha County, Milwaukee County, Ozaukee County, Racine County, Walworth County, Washington County, and Waukesha County.

[5] This study employs the term "film industry" to refer to the broad range of creative media businesses extending across film, video television production, digital production, and multimedia. See appendix B for full list of industry sectors included in industry analysis.

This report summarizes ICF's analysis and the outcomes of the collaborative stakeholder strategy process. It includes the following sections:

- **Section 2 – Methodology:** Summary of conceptual framework and methods used
- **Section 3 – Industry Analysis:** Structure and dynamics of the region's film industry
- **Section 4 – Foundation Assessment:** Assessment of key supports to the regional industry
- **Section 5 – Film Cluster Action Plan:** Outputs of the collaborative action planning process
- **Section 6 – Next Steps:** Key next steps that regional stakeholders can take to further develop and implement the emerging action plan.

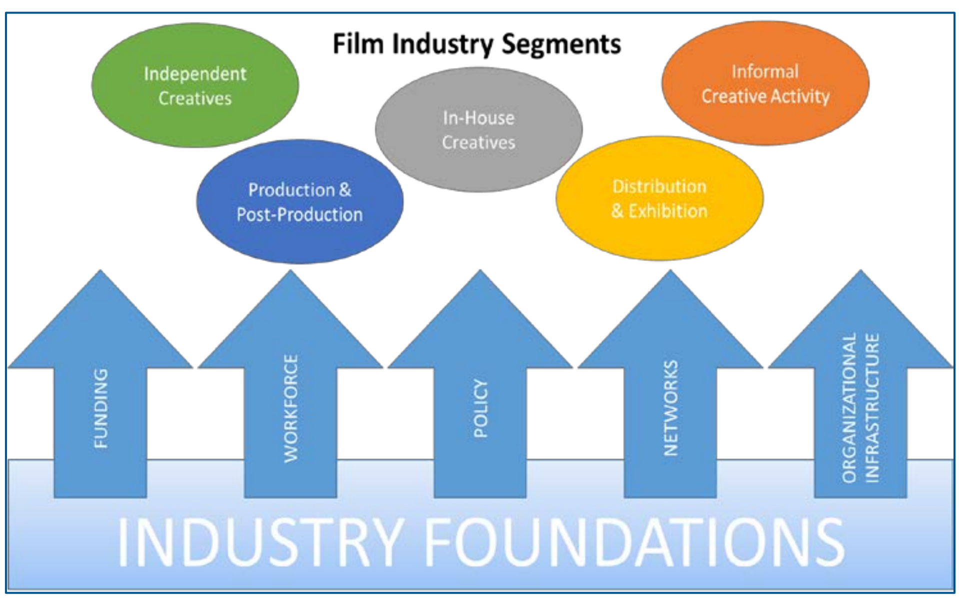
2. Methodology

Before discussing the specific methodology used in this study, this section begins by discussing the conceptual framework that underlies our approach to industry cluster competitiveness strategy. The unit of analysis in this framework is typically a multi-county region or "commute-shed", as it is at this regional level that labor and skills circulate and industry actors can most effectively collaborate. Furthermore, this approach builds on the hypothesis that as more firms in related industries agglomerate within the same geographic area, supplier relationships develop through local purchasing along the value chain and expertise and innovations are transmitted among these firms. These synergistic relationships work to further strengthen the economic performance of firms within the cluster.

According to this framework, efforts to improve the competitiveness of regional industry clusters and promote economic development should be grounded in a detailed understanding of the structure, composition, and dynamics of the regional industry.

Moreover, this framework emphasizes that the competitiveness and growth of firms within the regional cluster is critically influenced—either supported or impeded—by key inputs or "industry foundations" such as access to financing, access to a skilled workforce, supportive government policies, etc. These foundations are critical levers that can be influenced at the regional level by both market players and non-market actors such as government, schools, donors, and civil society organizations. Assessing regional assets and challenges in each of these foundation categories is an essential step in designing effective strategies and interventions to support the sustained growth and competitiveness of the industry cluster.

Exhibit 1. Industry Cluster Diagram



This project included two main components:

- **Industry Analysis and Foundation Assessment:** An analytical phase which included an analysis of the regional industry's composition and dynamics, and an assessment of the foundational inputs that support it; and
- **Collaborative Strategy Process:** A stakeholder-driven process of defining strategic goals and actions to strengthen the industry, which included a day-long facilitated workshop to develop an industry action plan and form action teams to lead implementation of priority actions.

Details of the approach used for each of these components is presented in the two sub-sections below. Additionally, as a supplement to this report, ICF was engaged to assess the economic impact of the Milwaukee Film Festival. To conduct this assessment, ICF used the IMPLAN model, a tool widely used by state agencies in the Midwest and throughout the country. The analysis assessed the effects of the festival's operational expenditures and audience spending during the 15 day event, including spending at restaurants and bars, spending on transportation around town, non-festival entertainment spending (e.g., Milwaukee museums or historical sites), and out-of-town guests' spending on lodging. The analysis provides estimated impacts for each of these spending profiles (operational expenditures, in-region attendees, and out-of-town attendees), as well as an overall estimate of the Milwaukee Film Festival's 2016 impact on the state economy. The analysis concluded that the 2016 Milwaukee Film Festival sparked enough economic activity to support $4.9 million of industry activity in Wisconsin, created nearly 60 jobs, and generated $291,000 of Wisconsin state and local tax revenue.

2.1 Industry Analysis and Foundation Assessment

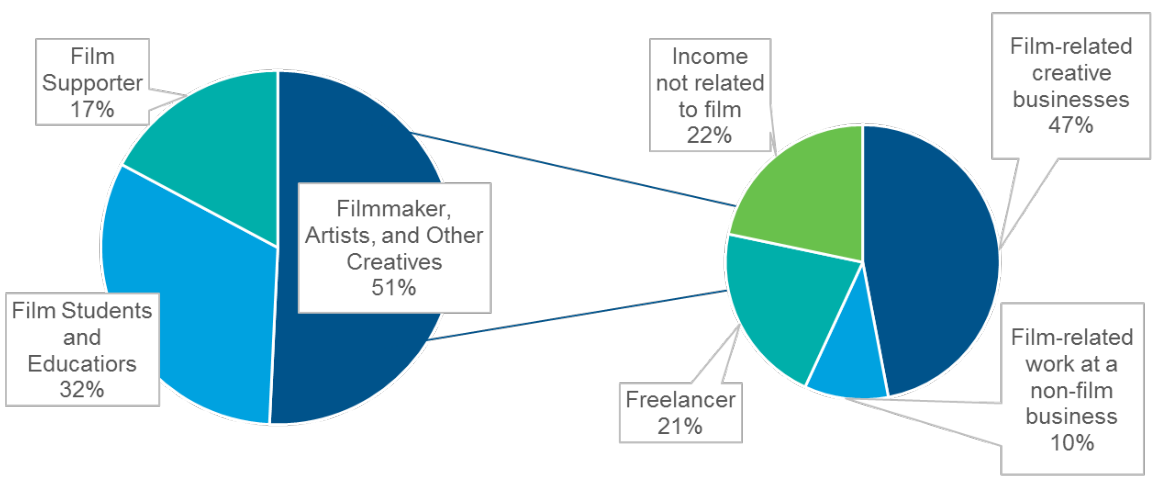
ICF's assessment drew from three sources of data: (1) federally collected industry and economic data; (2) a survey of regional industry stakeholders; and (3) interviews conducted on-site and by phone. ICF's Milwaukee Film Survey was launched on August 30, 2016 and closed on October 10, 2016. Each of these sources served to inform and validate the others, for instance, survey responses were used to generate an initial assessment of the industry and its growth trends which were further developed and validated by analysis of industry data, interviews, and group discussions. Ultimately the discussions during the Action Planning Workshop provided a final refinement to the industry analysis and foundation analysis, bringing together all three sources of information.

Federal Economic Data: To analyze industry (NAICS-code based) and occupation (SOC-code based) data, ICF utilized the EMSI tool that aggregates government labor information. ICF assessed industry and occupation trends over a 10-year period (from 2006 to 2015), however, much of the analysis presented in this report focuses on the past five years, 2010-2015, in order to highlight the more recent dynamic trends. ICF also analyzed educational degree information to get a sense of the local higher education workforce pipeline and industry revenue data to assess the magnitude of the region's film industry.

Survey: ICF created, pre-tested and administered a web-based survey of the region's film industry stakeholders to gain information on respondent's film-related activities, perceptions of the region's industry, and judgments on the strengths, challenges, and opportunities in key foundation categories. The survey was launched on August 30, 2016 and closed on October 10, 2016, and during its 6-week duration it received a total of 767 responses. An invitation to participate was emailed to known individuals who are involved in the region's film-related activity, with a request to further disseminate the link.

As can be seen in Exhibit 2, below, the majority of respondents (51 percent) self-identified as being a filmmaker, artist or other creative, 32% self-identified as a film student or educator, and 17% self-identified as a supporter of the region's industry (e.g., non-profit arts organization, donor). Of those who identified as being a film creative, 47% work at or own a creative business, 22% are engaged in film-related activity outside of their primary source of income, 21% work as a freelancer, and 10% consider are in-house creatives, doing creative work but employed by a non-creative industry (e.g., a commercial film producer employed by an insurance company).

Exhibit 2. Survey Respondent Demographics



Source: ICF Milwaukee Film Survey

Of those who identified as a film student or educator, the majority (65%) were students and 27% were instructors or administrators in a post-secondary setting. The remainder were engaged with youth, either in a K-12 setting or through activities outside of school. Supporters were engaged in a range of activities, however the majority identified as funders. For a more granular discussion of the survey methodology and responses, see Appendix A.

Stakeholder Interviews and Group Discussions: Members of the ICF team conducted three site visits to Milwaukee during the course of the project. Our first visit occurred May 18-20, 2016 to develop a baseline understanding of film activity in the region and interview key individuals within the film creatives network, the Milwaukee Film organization, and at local educational institutions. ICF's second site visit, which was scheduled for late September 2016 to coincide with the Milwaukee Film Festival, focused on validated initial findings and gathering additional qualitative data. Finally, ICF returned to Milwaukee in November 2016 to facilitate the Action Planning Workshop detailed below and in Section 5.

2.2 Action Planning Workshop

On November 17, 2016, an all-day collaborative workshop that attracted over 65 film industry stakeholders was held at Franklin High School. The first half of the day included a presentation by ICF of the preliminary industry and foundation analysis, a group discussion to validate and refine those initial findings, and a high-level visioning session to articulate a long-term vision for the region's industry. The latter half of the day was devoted to intensive breakout group discussions—organized around five key foundations that support the industry—to articulate shared strategic goals and concrete actions to strengthen each foundation. Due to the large attendance at the workshop, participants were divided into eight tables, with each table designating a facilitator, a scribe, and a spokesperson for the report-out phase of the workshop.

ICF provided a structured process to facilitate the group brainstorming, shepherding the four-hour group discussion through four stages of increasing granularity:

1. Articulating broad strategic goals for each foundation;
2. Brainstorming a wide range of concrete actions to strengthen the foundation;
3. Prioritizing among those potential actions; and
4. Fleshing out key details of the top three most promising actions.

Each breakout table reported on the outcomes of their conversation to the full group—using templates provided by ICF (see Exhibit 12 in the Appendix)—summarizing their proposed strategic goals, top three priority actions, other promising actions, and preliminary details for each of their top three proposed actions. The full group was then invited to provide input to each breakout team during a "Gallery Walk" session through a combination of written comments, oral feedback, and signing up to join the Action Teams that are being formed to further develop and implement priority actions.

3. Industry Analysis

This industry assessment provides the necessary understanding of the structure and dynamics of the film industry in the Greater Milwaukee region to enable effective planning to support its growth. It provides a baseline of the region's film industry in terms of size, growth and competitive position overall as well as for its core sectors. Additionally, analysis was done to compare Milwaukee's film industry to national film hubs and peers to provide perspective on its own size, growth and concentration. Survey findings were integrated into the data analysis to contextualize the results as well as confirm if the data were painting an accurate picture of what those engaged in the film industry were experiencing on the ground. This contextualization is an important aspect of the analysis, as perceptions of size, growth and strength are key to the industry's identity. Strategies to support its growth need to be informed both by the reality of the data as well as the perceptions of those engaged.

This section of the report describes various aspects of the Milwaukee film industry's competitive position. First there is a brief discussion of the regional context to provide perspective to the industry-specific discussions. Next, there is high-level discussion of the region's film industry including dominant perceptions that surfaced from the survey. The following discussion details the industry' size, growth and competitive position compared to peer locations. Lastly, the analysis drills down into the composition of the industry in terms of demographics, industry sectors, and occupations. Industry sector and occupation detail is useful for understanding which parts are more significant in terms of size, which are growing and shrinking, and which are highly concentrated. The position of core sectors and occupations can dictate what strategies would be employed to support growth.

3.1 Regional Context

In 2015, the Greater Milwaukee region[6] was home to more than 2 million people and 1.2 million jobs. Overall the region experienced a five percent growth in employment between 2010 and 2015, keeping pace with statewide growth but significantly slower than the national average of 9%. That said, the region's average earnings (at $54,500) are on par with the nation. Moreover, Greater Milwaukee is considered a great place to live and work, with relatively low cost of living and significant amenities, including the local arts scene.

Arts in the region have long been a focus of economic strategy and growth. In 2010 a study of the region's creative industries, *Creative Industries, A New Economic Growth Opportunity for the Milwaukee 7 Region*[7], was performed to define and understand the Milwaukee region's creative industries. This analysis included an assessment of the Media and Film industry cluster which captured distribution and production of motion pictures, music, radio, print, and cable and television programming. Despite the inclusion of a broader mix of industries, many of the study's findings are relevant to this analysis of the film industry. The study identified trends that are similar to what ICF found, including strengths in the region's overall creativity and ability to reach niche markets, including independent film making of documentary and avant-garde films. Moreover, the study found that in 2010 there was a promising but small film component with low concentrations but great opportunity due to its visibility in the region and strong higher education programs. To the extent relevant, ICF's analyses included these earlier findings in our assessment, drilled down into the film-related activities specifically and looked to identify concrete action steps to strengthen the challenges identified.

3.2 Perceptions of the Film Industry's Importance and Vitality

As discussed, there is significant enthusiasm among those engaged in film-related activities and consensus that the region has robust higher educational institutions, a talent pool and momentum to grow. In 2014 the region's film industry produced over $1.55 billion in annual sales and generated over $530 million in labor income in the Greater Milwaukee region. Survey respondents as well as those who were interviewed throughout the study reported on the importance of the film industry to the growth of the broader creative economy in Milwaukee and touched upon its dynamism. Specifically, 67% of supporter survey respondents indicated that the film industry's activity is critical to the overall Greater Milwaukee economy and 93% believe that film activity is critical to the regional art scene. There is a strong sense that the region has

[6] The Greater Milwaukee region, also referred to as the M7 region, includes Kenosha County, Milwaukee County, Ozaukee County, Racine County, Walworth County, Washington County, and Waukesha County.

[7] Creativity Works, A Joint Project of the Cultural Alliance of Greater Milwaukee and the Greater Milwaukee Committee Milwaukee Regional Creative Industries Project, January 2011

the underpinnings of a robust film economy and, with targeted support, there is a great optimism that it will continue to attract talent and grow into a significant film hub.

While the local market is still small, nation-wide and generational demands for media content are on the rise and have the potential to support the region's growth in film. Sixty-three percent of survey respondents indicated that the Greater Milwaukee region is a great place for film maker and other creatives to work and 43 percent indicated that they moved to the region specifically to pursue a creative education or creative career. The region's growing reputation is attracting talent yet, the current size of the industry is not yet able to support all of the home-grown and attracted talent. Only 40 percent of education sector survey respondents felt that students were able to find careers within the region's local film industry, this represents a significant concern as it means that locally created talent may be forced to move to other regions to find opportunities.

There are some key strategic implications of these findings. First, the region can and should continue to build upon its strengths and assets. Investment in this industry and its foundations is needed to realize the full potential of its current assets as well as to bolster the areas of weakness. Additionally, initiatives that help grow the market will also support the retention of talent, providing them opportunities to develop their careers locally and contribute to the growth of local film activity. This will have a cyclical effect which will enable even further development of the industry.

3.3 Industry Size, Growth and Concentration

The most basic measure of an industry's strength is its size. In 2015, there were roughly 14,600 jobs in Greater Milwaukee film industry, which includes employment in the follow 16 core value chain sectors:

- Advertising Agencies
- Commercial Photography
- Drive-In Motion Picture Theaters
- Internet Publishing and Broadcasting and Web Search Portals
- Independent Artists, Writers, and Performers
- Motion Picture Theaters (except Drive-Ins)
- Motion Picture and Video Distribution
- Motion Picture and Video Production
- Other Motion Picture and Video Industries
- Other Performing Arts Companies
- Other Sound Recording Industries
- Photography Studios, Portrait
- Software Publishers
- Sound Recording Studios
- Teleproduction and Other Postproduction Services
- Television Broadcasting

To put this size in context, the region's film industry is roughly the same size as its management, scientific and technical consulting services industry and nearly five-times the size of the region's famed beer manufacturing and distribution industries, which employ around 3,000 individuals.

For several reasons, the region's film industry employment figure must be further contextualized as it almost certainly represents an undercount of the actual number of individuals engaged in film-related activity for several reasons. First, this figure only counts those employed in film-related industries, meaning that it does not capture in-house creatives who are employed by a broad range of industries from banks and insurance companies to retailers. Secondly, and almost more importantly, as the research discovered from the survey findings, there is a significant amount of film-related activity done by individuals outside of their primary employment, meaning they are not counted in the federally collected employment data. According to ICF's survey results, the majority (55%) of all survey respondents are actively engaged in film-related activity beyond formal work or school activities and 81% of in-house creatives who responded to the survey are engaged in informal activity outside of their formal employment. These findings indicate that the cultural as well as economic value of the region's film activity is not well captured by industry employment data.

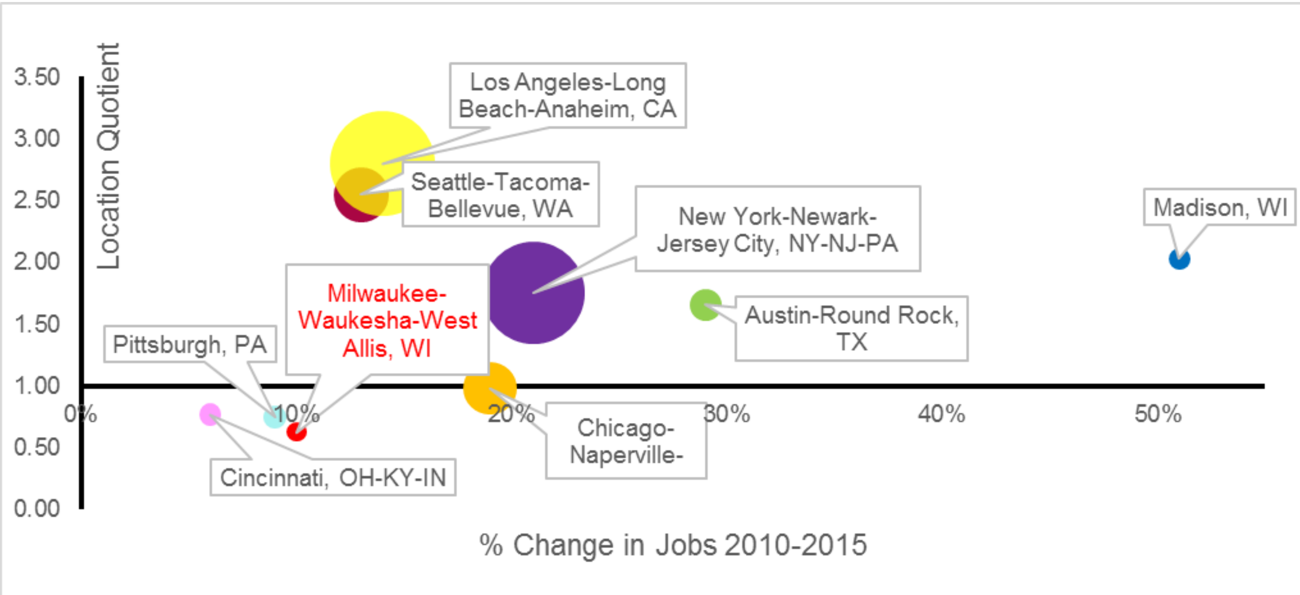
While the actual figures might represent an undercount, an upward trend is clear. From 2010 to 2015 employment in the film industry grew ten percent, or twice as fast as the overall regional economy. This rapid growth has been recognized throughout the industry as three-quarters of survey respondents recognized that industry has grown in recent years. Unfortunately the relatively small size of the industry currently could undermine its future growth. The survey identified a lack of freelancing opportunities and challenges faced by graduates trying to build film careers within the region. If the current market cannot support existing creatives, it will be hard to grow the employment base. These findings point to a need for initiates that support the growth of the market, expose creatives to new opportunities such as services and shared physical space that will foster a stronger network across the industry for knowledge sharing as well as market connections.

In addition to employment levels and growth, location quotient (LQ) is also considered a key metric to describe an industry's competitive position. An LQ of above 1 indicates that the industry is more concentrated than the national average, while an LQ below 1 indicates that it is less concentrated than the national average. A high concentration is indicative of a competitive advantage in which high demand has created an above average concentration of activity. In these locations, the region is most likely exporting its goods or services to other regions, thereby bringing in outside dollars. Lower LQs are indicative of a locally-serving market in which there isn't enough (outside) demand to warrant above average employment in that industry.

Exhibit 3, below is a growth-share matrix, used to illustrate the size, growth and competitive position of the Greater Milwaukee film industry in relation to peer regions. As can be seen, the Milwaukee film industry is roughly the same size as Madison's film industry and half the size of Austin's (at 33,000 employees). It is growing at the same pace as similarly sized industries in Pittsburg and Cincinnati as well as established clusters in Los Angeles and Seattle, but noticeably slower compared to regional peers Chicago and Madison. The rapid growth of the film industry in Madison is driven by their booming software development sector.

Milwaukee's film industry has an LQ of .64, less concentrated than Madison (LQ of 2.03) that is driven by the growing software sector, but only slightly less so than Chicago's (LQ of .98).This is indicative of an industry that is locally serving. Nearly 60% of local film creatives who responded to the survey indicated that they have access to the film resources they need within the region and that, as a locally serving industry, film in Milwaukee is able to thrive. That said, the region is not exporting its services and products externally, as confirmed by 72% of film creatives respondents who indicated that they predominately serve the local market.

Exhibit 3. Growth-Share Matrix of M7 Film Industry Cluster and Peer Regions



Note: Size of bubble represents the size of the industry (employment), position on the x-axis indicates growth rate (the further right, the faster the growth), and position on the y-axis indicates concentration, with LQs over 1 in the top half of the chart.

Source: EMSI Industry data, 2010, 2015

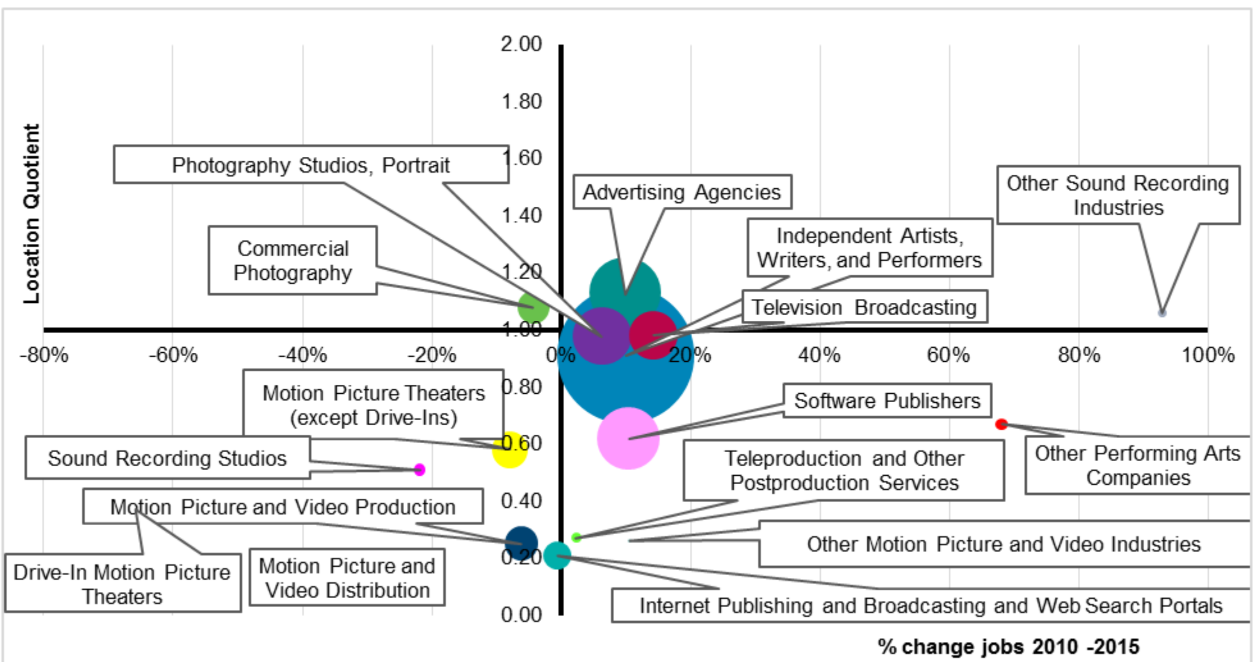
Another trend Exhibit 3 demonstrates is the dominance of the national film hubs Los Angeles and New York, both in terms of competitive position and growth. It is not appropriate to compare Milwaukee to either Los Angeles or New York because of their history and dominance in this industry, but instead more interesting to consider opportunities to strengthen linkages to and leverage the successes of regional peers, Chicago and Madison. One approach to growing Milwaukee's film industry for export is to start by selling film-related services to these neighbors, where personal networks can be leveraged.

3.4 Industry Composition

Exhibit 4, below, provides a more granular analysis of the industry sectors that comprise the overall film industry. Of note is the dominance of the Independent Artists, Writers and Performers sector with more than 7,000 employees and a robust growth rate of ten percent. This sector accounts for roughly half of all film industry employment in the region. Other sectors that that are growing and have average or above average concentrations include Advertising Agencies, Photography Studies, Other Sound Recording Industries and Television Broadcasting. See the detailed table of sector-specific employment, growth and concentration date in Appendix B. These findings point to the importance of aggregating the activity of the region's independent artists, continuing to nurturing it and connecting it to the broader film economy and external markets.

> **Industry Diversity**
>
> Another important aspect of industry composition is diversity within the workforce. Only 43% of survey respondents indicated that the Greater Milwaukee film industry is racially and ethnically inclusive and only 30% of film creative survey respondents believe that it is easy to find diverse collaborators. Industry data confirms a homogeneous workforce in which 91% of the employment identifies as white. As the region focuses on growing the overall film industry, it will be important to strengthen activities that develop minority skills, support minority artists/businesses, and better serve minority markets.

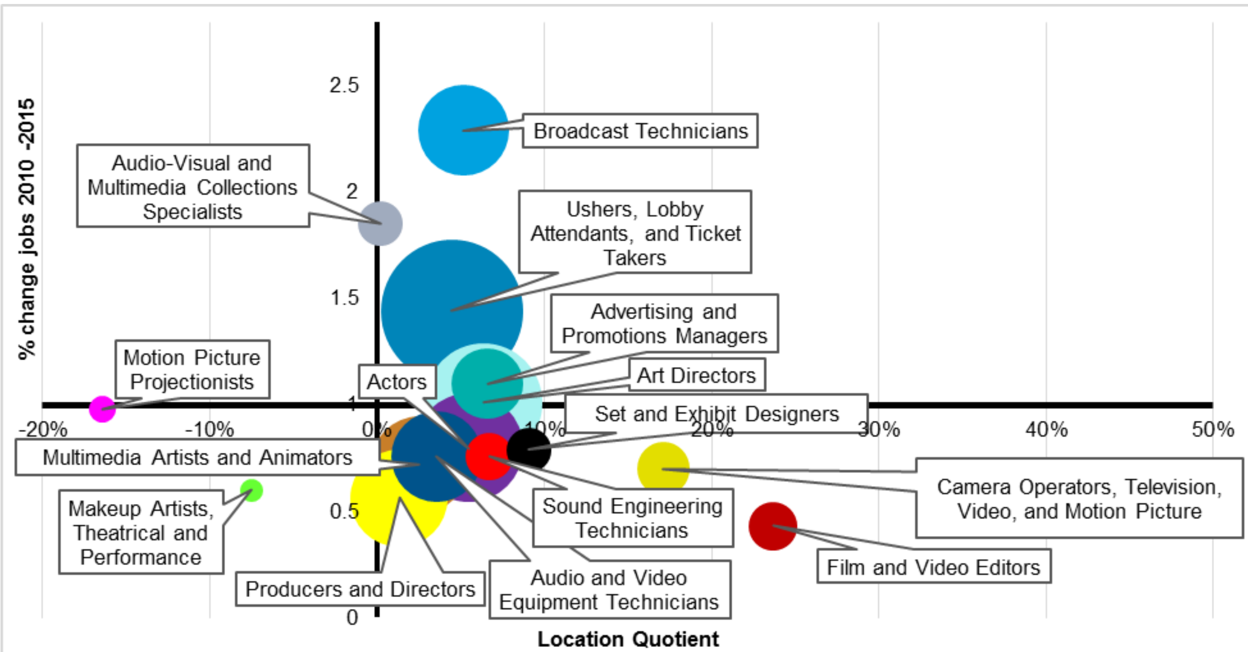
Exhibit 4. Growth-Share Matrix of M7 Industry Sectors



Source: EMSI Industry data, 2010, 2015

While industry data focuses on the business establishments engaged in film-related activity in Milwaukee, occupation data provides another approach for evaluation by highlighting the individuals who are engaged in film-related activities whether they are embedded in traditional industries or in film-related industries. Exhibit 5 provides a granular analysis of 5,800 employees engaged in region's film-related occupations. Roughly 2,000 of these employees are engaged in occupations that are also in film-related industries. Key occupations include those with large employment bases of more than 500 employees such as Art Directors, Multimedia Artists and Producers and Directors, as well as those occupations with double-digit growth such as Film and Video Editors (24%) and Camera Operators, Television, Video, and Motion Picture (17%). Most significant, perhaps are those occupations that are sizable or growing and have strong concentrations, such as Art Directors, Broadcast Technicians, Advertising and Promotions Managers and Audio-Visual and Multimedia Collections Specialists. Similar to the trends reported in Exhibit 4, the majority of film occupation sectors are growing, and there are several significantly sized occupations that have average or above average concentrations. See the detailed table of occupation-specific employment, growth and concentration data in Appendix B.

Exhibit 5. Growth-Share Matrix of M7 Film-Related Occupations



Source: EMSI Industry data, 2010, 2015

These sector-specific findings point to the importance of convening key sectors such as independents or art directors across industry and occupation through networking and access to shared resources. Since independent artists, writers and performers are the core of the region's industry in terms of volume, initiatives that bring the market place together will be critical to sustain momentum for growth. Furthermore, strategies should build around the sectors of existing strength[8]. Developing a robust non-local market around these capacities will help establish the Milwaukee region's reputation and hopefully create a client base to sell broader offerings across the value-chain. Lastly, the region needs to pay special attention to the weak sectors that might be core to sustaining the industry's growth.

[8] AV multimedia collection specialists (LQ of 1.85), Advertising Agencies (LQ of 1.13), Advertising and Promotion managers (LQ of 1.10), Art Directors (LQ of 1.01), Commercial Photography (LQ of 1.08), Other Sound Recording Industries (LQ of 1.06), Film and Video Editors: 24% growth (LQ of 0.43)

4. Foundations of the Regional Film Industry

As described in Section 2, the region's film cluster is undergirded by a set of economic foundations—key inputs—that can either support or impede industry growth. These foundations are critical levers that can be influenced by both market players and non-market actors such as government, schools, donors, and civil society organizations. Understanding the region's assets and challenges in each of these areas is critical to designing effective strategies to support the development and competitiveness of the cluster.

To this end, ICF's study assessed the following five foundations that are critical to the future growth of Greater Milwaukee's film industry:

1. **Funding and Investment:** Access to finance, investment, grants, VC, and other funding needed to grow the region's industry.
2. **Government Policy and Regulation:** Laws, regulations, and government policies that either enable or impede growth of the region's industry.
3. **Workforce, Skills, and Education:** Access to skilled workers; and the ability of K-12, university, and other institutions to provide those skills in the region.
4. **Networking:** Access to physical, virtual, or cultural resources that enable networking and collaboration; both within Greater Milwaukee and with other regions.
5. **Organizational Infrastructure:** Organizational capacity to convene the industry and support the implementation of strategic initiatives.

Drawing on stakeholder insights conveyed through the survey, individual interviews, and group discussions at the November 17th workshop, ICF assessed the key assets and challenges in each of these domains and begin identifying potential strategic actions to strengthen them.

The subsections below summarize ICF's assessment of the regions' key economic foundations. Each subsection begins with a definition of the foundation topic, followed by a list of the top assets and challenges identified by survey respondents,[9] and concludes with a summary discussion of key regional issues. Note that ICF's preliminary assessment was presented to industry stakeholders for refinement and validation at the November 17 action planning workshop, and the modifications proposed by stakeholders are denoted by underlined text in the tables below.

4.1 Funding and Investment

The "Funding and Investment" foundation refers to the extent to which the regional economy provides adequate access to finance, investment, grants, venture capital, and other forms of funding that are needed to grow the region's industry. Overall, funding and investment were seen as areas of challenge by many film industry stakeholders—a weak foundation in need of support to enable future industry growth and competitiveness. The top regional assets and challenges identified by survey respondents are listed in the table below.

[9] If an asset or challenge listed is followed by an asterisk, this signifies that it was ranked among the top five most important in its category by survey respondents.

Assets of the Region	Challenges in the Region
▪ High enthusiasm about funding films ▪ Access to local funding has been increasing ▪ <u>Cost of doing business lower than several competing regions</u>[10] ▪ Brico Forward Fund is well-liked and effective ▪ Film festival provides cash awards to winning entries	▪ Lack of awareness of project funding options and/or knowledge of how to apply*[11] ▪ Lack of access to local project funding* ▪ Lack of significant local consumer base for films ▪ Lack of access for film to some institutional funders such as UPAF ▪ Legal complexities around fiscal sponsorship

While stakeholders identified a number of important assets in the region, including a comparatively low cost of doing business, high enthusiasm for funding films, and an increase in access to local funding, respondents generally believed that access to funding and investment for film-making activities is a challenge in the region. Survey respondents ranked a "lack of access to local project funding" and "lack of awareness of project funding options" as two of the top five challenges facing the region's industry, and several specific financing constraints were identified, including lack of access to institutional funders and complexities around fiscal sponsorships.

There was a widespread desire expressed to increase access to sustainable funding for local filmmakers, local film projects, and local film businesses. As one component of this, several stakeholders commented on the effectiveness of the Brico Forward Fund which provides grants to local filmmakers, and calls were made to expand this fund, and similar funds, in coming years.

4.2 Government Policy and Regulation

The "Government Policy and Regulation" foundation refers to the range of state and local laws, regulations, and government policies that can either enable or impede growth of the region's industry. The top regional assets and challenges identified by respondents are listed below.

Assets of the Region	Challenges in the Region
▪ Milwaukee region's relatively small bureaucracy (e.g., compared with Chicago and LA) might make it easier to cut through red tape and expedite productions	▪ Lack of film incentives makes it extremely difficult to attract large-scale productions ▪ Tax code doesn't support film industry* ▪ Broader regulatory environment unsupportive ▪ Confusing permitting processes and lack of a central hub for information related to permits

[10] Modifications to the preliminary assessment that were proposed by stakeholders at the November 17 workshop are denoted by underlined text.

[11] An asterisk signifies that this item was ranked among the top five most important in its category by survey respondents.

While Milwaukee's relatively small bureaucracy was seen as an asset for expediting productions and "cutting through red tape", regional film industry stakeholders felt that there is a general lack of government support for the film industry, and they articulated a number of significant policy issues that constrain industry growth. There is broad consensus that the current lack of film incentives makes it extremely difficult to attract large-scale film productions to the region, and there are broader complaints of an unsupportive tax code and regulatory environment. For instance, several stakeholders emphasized that both the state's payroll tax and Sales and Use Tax don't properly treat filmmaking and film production activities, and that guidance from the tax office has thus far been ambiguous and confusing. Film industry stakeholders called for these policy and tax barriers to local filmmaking to be eliminated, and requested that state and local government become more proactively supportive of the region's growing film industry.

4.3 Workforce, Skills, and Education

This foundation category refers to the availability of skilled workers in the region and the ability of the region's K-12, university, and other institutions to provide needed workforce skills to the region's firms. Film industry stakeholders indicated that Greater Milwaukee has strong talent and a historically strong skills pipeline, but that the region's film industry workforce faced major challenges related to retention and the underfunding of key educational institutions. The top regional assets and challenges identified by survey respondents are listed below.

Assets of the Region	Challenges in the Region
▪ Local creative collaborators and mentors* ▪ Moderate size pool of local filmmaking talent, including crew and production companies ▪ Access to top post-secondary educational programs ▪ Over 900 bachelor's degrees granted in film/creative degrees in 2015	▪ Very difficult to keep young talent from relocating to other markets ▪ Lack of access to diverse talent pool ▪ Limited pool of well-skilled editing teams; ▪ Limited access to on-set crew depth for feature film production. ▪ Local crew not accustomed to intense demands of working on big budget productions ▪ Limited K-12 film programming; lack of training for K-12 teachers to discuss film ▪ Lack of funding limits post-secondary schools programming and tech (e.g., only 32% of students and educator respondents felt that post-secondary students receive the business training they need to be successful in the film industry.)

Stakeholders pointed to the strong pool of local filmmaking talent, film crews, and production companies, and there is a widespread sentiment that the region is full of talented and creative people who are willing to collaborate with and mentor others in the industry. That said, there were several specific gaps identified in the local workforce, including a limited pool of well-skilled editing teams, limited access to on-set crew depth, and a broader lack of diversity in the film-related workforce. Most critically, there is a widespread perception that it is extremely difficult to retain young talent in the Greater Milwaukee region, as the limited size of the local market leads talented young professionals to seek employment in larger markets.

Stakeholders also pointed to the wealth of excellent post-secondary educational programs in the region that have a strong tradition of educating filmmakers and produce hundreds of skilled graduates per year with film-related and other creative degrees. The University of Wisconsin-Milwaukee's Peck School of the Arts has one of the top 15 film schools in the U.S., and an increasingly important role is being played by Marquette University, Milwaukee Area Technical College, and the Milwaukee Institute of Art and Design. However, a range of stakeholders commented that shortages in funding for both K-12 and post-secondary educational programs limits their programming and technology offerings, and threatens this historical competitive advantage of the region. Stakeholders consulted through interviews, the survey, and workshop discussions consistently commented that increased funding and other support of educational institutions' film-related programming would be key to attracting and retaining talent to the region, and supporting this dynamic and growing local industry.

4.4 Networking

The "Networking" foundation refers to the existence in the region of effective resources and mechanisms for networking and collaboration among industry actors. These resources may include physical spaces (e.g., co-working spaces), virtual places (e.g., web-based collaborative hubs), formal organizations (e.g., guilds), or more informal cultural resources (e.g., interpersonal relationships, social networks, etc.). The networking foundation is critical for both enabling collaboration among the diversity of local actors within the Greater Milwaukee (i.e., local networking) and for facilitating communication, collaboration, and commerce with parties in other regions, states, or countries (i.e., external networking).

The top regional assets and challenges identified by survey respondents are listed below.

Assets of the Region	Challenges in the Region
▪ Strong collaborative culture ▪ Role models / mentors for young filmmakers ▪ Milwaukee Film Festival is a great asset to network, collaborate, and raise industry visibility. (84% of survey respondents have attended MFF). ▪ Networking opportunities with local alumni	▪ Distance from national film hubs* ▪ Weak relationships with Madison and Chicago networks ▪ Lack of diversity within the local film community ▪ No good database of local resources and locations ▪ Lack of community resources to showcase work ▪ Lack of a physical hub or co-work space to enable ongoing networking & collaboration

Local film industry stakeholders felt the region has a strong collaborative culture and that there is a wealth of role models for young filmmakers who are willing to share their time and guidance as mentors. And the Milwaukee Film Festival was seen by stakeholders as a particularly valuable regional asset that enables networking and collaboration among cluster members, builds credibility with investors, and raises the visibility of the industry beyond the region.

But there were a number of important challenges identified, relating to both local and external networking. On the external side, stakeholders felt that Milwaukee's geographic distance from and relatively undeveloped relationships with the major national film hubs was a significant impediment to cluster growth. And several—but not all—stakeholders suggested that collaborative relationships with Madison and Chicago were weak. In terms of local networking, stakeholders shared a broad consensus that the there is a lack of diversity within the local film community, that there is currently no complete and well-maintained database of local resources and locations to facilitate making connections and building relationships, and that more resources are needed enable ongoing networking and networking and collaboration among cluster members. Stakeholders recommended creating more and better local networking opportunities, establishing of a physical hub or co-work space for film-related activity, and strengthening network relationships with New York, Los Angeles, and other key local and international film hubs.

4.5 Organizational Infrastructure

Finally, the "Organizational Infrastructure" foundation refers to the existence in the region of the organizational capacity needed to convene the members of the industry cluster over time, communicate and advocate for their shared interests, and support the implementation of strategic cluster initiatives. The top regional assets and challenges identified are listed below.

Assets of the Region	Challenges in the Region
▪ Several existing state and local organizations related to film/arts that could be better leveraged	▪ No dynamic statewide film office to help identify locations, facilitate permitting. ▪ Several past attempts to create a State Film Commission have failed ▪ Film Wisconsin is not well-connected to Greater Milwaukee activities ▪ Lack of awareness/publicity of Milwaukee's film-related assets (e.g., shooting locations, production companies, crew, etc.) ▪ Lack unifying vision/strategy to build a coalition and mobilize support ▪ Lacking organizational capacity to help coordinate and track progress on strategic industry initiatives

ICF's research found that, while there are several existing organizations related to film and the arts that could be leveraged for these roles, none of them are sufficiently focused on the activities taking place in the Greater Milwaukee region, and there currently isn't adequate organizational capacity being allocated within the region to perform these functions sustainably. Local industry stakeholders articulated a range of specific challenges related to this topic, including the perception that Film Wisconsin is poorly connected to activities in the M7 region; there has thus far been a lack of unifying vision or strategy around which to build an industry coalition and mobilize support.

While Milwaukee Film has thus far played an important role in gathering members of the industry and helping to advance their interests, many stakeholders expressed the need for additional organizational infrastructure within the region for convening the broader members of the industry cluster, communicating and advocating for their shared interests, and supporting the implementation of strategic cluster initiatives. In the remainder of this report, this future cluster coordinating organization, which has yet to be formally named and constituted, is referred to as "FilMKE."

Informed by these initial assessments of the region's current foundation strengths and challenges, the next section of this report documents a range of strategic goals and concrete actions that were developed by industry stakeholders over the course of the collaborative strategic planning process.

5. Film Industry Action Plan

In addition to analyzing the region's film industry and its foundational inputs, this initiative was conceived to help mobilize stakeholders from across the region and bring them together to define a shared agenda for strengthening the dynamism and competitiveness of the industry. The first step of this process was the convening of a collaborative planning workshop on November 17, 2016.

The goals of the workshop included:

- Presenting and refining ICF's preliminary industry assessment (summarized in Section 3);
- Launching an action planning process to strengthen the region's film industry; and
- Forming Action Teams to lead further development and implementation of priority actions.

This section of the report documents this workshop process and its main outcomes.

5.1 Planning Framework and Workshop Process

Exhibit 6 lays out the framework employed for this strategy process, which included six phases, each phase focusing on an increasingly granular level of detail.

Exhibit 6. Phases of the Strategic Planning Framework

Phases of Process	Description	Timing
Assessment of the Industry & Foundations	Profile of the region's industry and foundational inputs.	*May-Oct 2016*
→ Industry Vision	A shared long-range picture of how the future industry will be	*Nov-Dec 2016*
→ Strategic Goals	A handful (e.g., 5-8) of broad goals for strengthening industry	*Nov-Dec 2016*
→ Strategic Actions	Specific actions (e.g., 10-20) to strengthen industry & foundations	*Nov 2016*
→ Action Planning	Elaborate detailed tasks needed for successful implementation	*Early 2017*
→ Implementation	Launch, implement, and track progress on priority actions	*2017 & beyond*

ICF's assessment of the regional film industry and its foundational inputs—which was completed between May-October 2016—laid the analytical bedrock for the collaborative workshop that was held on November 17, 2016. At that workshop, over 65 industry and regional stakeholders came together to spend a full day working together to refine and validate the preliminary assessment and develop the next three elements of the strategic planning process (i.e., Vision, Goals, and Strategic Actions).

The morning sessions of the workshop were devoted to the first two phases of the strategy process:

- **Refine and Validate Industry Assessment:** ICF began by presenting the analysis of the film industry and its foundations. Stakeholders were then invited to comment and ask questions with the goal of refining and validating the assessment. ICF also presented a range of initial ideas on strategic goals and actions that surfaced during the research phase, but it was emphasized that these were only preliminary ideas intended to seed the discussions that followed.

- **Shape Industry Vision:** Stakeholders were invited to contribute to the development of an industry Vision Statement which would articulate a shared long-range vision for the future of the industry. A draft vision statement was presented and circulated to participants, who were then invited to "mark-up" the draft statement with additions, deletions, and suggestions.

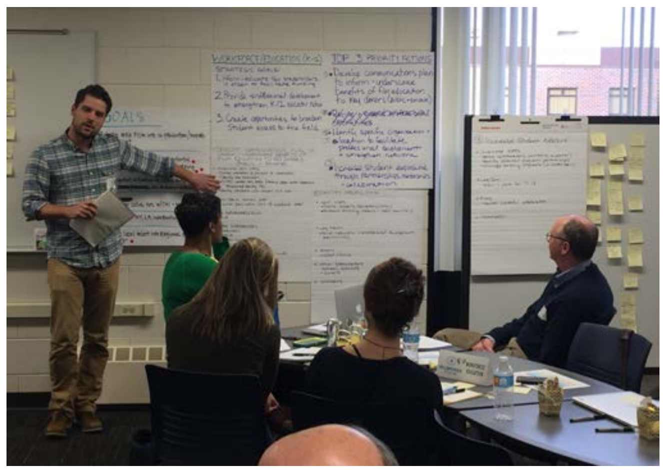
  Members of the Executive Committee reviewed the suggestions proposed by stakeholders in the days following the workshop, and developed a refined vision statement reflecting the collective input of the stakeholders. The committee also drafted a mission statement for the organization (i.e., FilMKE) that is being constituted to help support this vision. While these statements may continue to be refined as efforts evolve, the current drafts of these statements (as of the writing this report) are reproduced below.

> **Vision:** To make Milwaukee an internationally recognized center of media culture, commerce, and technology.
>
> **Mission:** To support all forms of media, television and filmmaking, both artistic and commercial, from Milwaukee to the world and from the world to Milwaukee. We strive to grow and sustain a diverse and vibrant creative community of storytellers through building an industry infrastructure that advances advocacy, education, and financial support.

The afternoon sessions of the workshop were devoted to small group discussions—organized around the five industry foundations—to begin to agree on shared strategic goals and potential concrete actions to strengthen each of these critical industry inputs. Due to the large attendance at the workshop, participants were divided into eight tables (by subdividing the workforce and networking topics), with each table designating a facilitator, a scribe, and a spokesperson for the report-out phase of the workshop. Additional photographs of the collaborative workshop are included in Appendix E.

ICF provided a structured process to facilitate the group brainstorming, shepherding the four-hour group discussion through the next stages of strategic planning:

- **Articulate Strategic Goals:** Each breakout group articulated a limited number of strategic goals; broad statements of the changes we want in the world to help achieve our vision. Keeping the goals broad allows them to remain stable over time, to be pursued by a range of different tactics, and to have a diverse coalition rally around them.
- **Identify and Prioritize Potential Actions:** Each group spent 30 minutes brainstorming more specific, concrete actions that could support the strategic goals identified and strengthen the industry cluster. Participants wrote ideas on sticky-notes and table facilitators organized the proposed actions by theme, eliminating duplicates, and combining/synthesizing ideas where possible.

  Participants were then given three sticky dots each and told to vote for the most promising potential actions that could be pursued in 2017 by the emerging coalition. This exercise resulted in each breakout group ranking its "top three priority actions" and a secondary list of "other promising actions".
- **Detailed Planning of Priority Actions:** During the final 30 minutes of this session, participants began sketching out key details of their top three most promising actions, including immediate next steps, longer-term tasks, key dependencies/risks, and stakeholders that should be involved. Because there was limited time available for this portion of work, participants only had a few minutes to begin sketching out their ideas. The process of elaborating all of the tasks and details needed for successful implementation—what needs to be done, by whom, and by when—will be more systematically pursued by interested stakeholders in early 2017.

At the end of the breakout sessions, each table reported back the outcomes of their conversation to the full group using templates provided by ICF. Stakeholders were then invited to provide feedback and suggestions to all of the breakout teams during a “Gallery Walk” session. Table facilitators posted their group summary flipcharts on the wall while participants walked through the “gallery” of potential strategic actions to provide verbal feedback, ask questions, and sign up to join the Action Teams that are being formed to further develop and implement the priority actions in 2017.

The outcomes of this collaborative planning process are documented in Section 5.2 below, and priority actions are listed in a summary table in Section 5.3. Subsequent phases of the process—including the next steps needed for further development and implementation of priority actions—are briefly discussed in Section 6.4.

5.2 Preliminary Action Plans

The discussion documents the outcomes of the action planning workshop by capturing the summaries presented by each of the eight breakout groups during the report-out period. Each summary Action Plan includes the following elements:

- Strategic Goals
- Top Three Priority Actions
- Other Promising Actions
- Breakout Group Participants
- Other Volunteers interested in joining Action Team

Note that these preliminary action plans are still embryonic, as they were the outputs of a time-bound group brainstorming process on a single day. These summaries are meant as documentation of that collaborative process, so no major editing has been done to the language generated by each group. These preliminary ideas will be fleshed out over the coming year by the Action Teams that are being formed to further develop and implement priority initiatives. The full outputs from each group—including task-level plans for several of the priority actions—are presented in Appendix D.

Funding and Investment

Strategic Goal:

I. Increase access to and visibility of sustainable funding for local filmmakers, local film projects & local film businesses

Top 3 Priority Actions:

1. Fund for Films
2. Distributor Access/Awareness
3. Funder Filmmaker Connectivity

Other Promising Actions:

- Grant Training Resources, Awareness, Workshops
- Diversify Funding Sources: Film Incentives & Banking
- Fiscal Sponsorship Improved Option for Commercial Projects
- Stronger link to Entrepreneurial community and conversation
- Case Studies of Successful Film Projects
- Database of Funding Opportunities
- Buy Local Initiative, i.e. use local filmmakers, ad agencies, more
- Pay Yourself Initiative, i.e. all project budgets must include compensation for maker
- Invite advertising agencies to film festival for local screenings and networking after

Government Policy and Regulation

Strategic Goals:

I. Make Milwaukee an internationally recognized center of film culture, commerce, and technology. (a re-statement of the cluster vision)

II. Create Milwaukee film cluster, including UWM, Milwaukee Film, etc.

III. Ensure that Wisconsin is tax-favorable to the film industry.

Top 3 Priority Actions:

1. Create council for future coordinating organization (e.g., FilMKE), including leaders from commerce, Milwaukee Film, UWM Film Department, K-12
2. Evaluate tax/subsidy climate for film and make recommendations
3. Win Wisconsin Economic Development Corporation (WEDC) funding to help support further development for the Milwaukee film cluster

Other Promising Actions:

- Create a political advocacy arm

Workforce, Skills, and Education

Due to the high level of interest in the topic of workforce, skills, and education, the breakout group discussion was divided into three tables. One group focused on the role of K-12 education, the second focused on the role of higher education institutions, and the third focused on broader opportunities for workforce and professional development. Each of these discussions is summarized in the sub-sections below.

Workforce and Skills: K-12 Education

Strategic Goals:

I. Inform and educate key stakeholders in order to facilitate funding
II. Provide professional development to strengthen K-12 educators
III. Create opportunities to broaden student access to the field

Top 3 Priority Actions:

1. Develop communications plan to inform and underscore benefits of film education to key donors (both private and public)
2. Identify specific organization and location (see also, "hub") to facilitate professional development and strengthen network
3. Increase student exposure through partnerships, mentorships and collaboration

Other Promising Actions:

- Motivate film industry to lobby for K-12 funding
- Survey underserved schools to identify need for technology
- Promote programs that highlight low-tech, accessible filmmaking practices
- Leverage A.C.P. to support actions (i.e., certification = $$$)
- Develop educator networking database for space and resource sharing

Workforce and Skills: Higher Education

This breakout group adopted a slightly different approach than other tables. They began by defining three Strategic Goals and then identified 2-4 potential actions for each of those goals. The two-page summary below is structured to reflect these outputs of the group discussion.

Strategic Goals:

I. Increase funding for media arts programs in higher education
II. Strengthen the skills pipeline from K-12 → Higher Ed → Industry
III. Build more work opportunities for local/national talent.

Priority Actions for Each Strategic Goal:
(Top priority actions are noted in parentheses)

I. Increase funding for media arts programs in higher education.

- Political activism of MKE Film Board and Supporters is needed to help university and government policy makers understand that higher education is crucial to developing the film industry. *(Priority Action #1)*
- Industry support for positions, scholarships, internships, equipment.
- Philanthropic support for endowed positions/scholarships. *(Priority Action #2)*

II. Strengthen the skills pipeline from K-12 → Higher Ed → Industry.

- Establish film as a city priority and align education to that priority. *(Priority Action #3)*
- Create special minority scholarships.
- Strengthen relationships between higher education and public schools.
- Provide students with workforce survival skills.

III. Build more work opportunities for local/national talent.

- Establish partnerships between industry and higher education, e.g. projects.
- Promote higher education as a resource for the industry.

Other Promising Actions:

- Create a network within MKE Film of people within universities.
- Create an annual calendar of events that build a film culture, tie outreach to calendar.
- Create higher education collaborations with high school and middle school "film" programs.
- Teach students to work with changing technology.
- Offer broad art training, not just technical. Teach the art, the commercial will follow.
- Become comfortable with the amorphous, unknown (this is what arts do).
- Paid internships for students.
- Create multi-institution curriculum leading to film institute. Save money, cut duplication.
- Provide practical arts & business workshops for students & community.
- Utilize language that embraces critical thinking, cultural production.

Workforce and Skills: Professional Development

Strategic Goals:

I. Develop and Retain Talent in M7 Region
II. Define the demand for our industry, since we now know the supply
III. Foster collaboration between current industry and educational partners

Top 3 Priority Actions:

1. Take Industry Professionals into more schools (K-12 and Colleges) to teach more about our industry, technology, and jobs
2. More Visiting Industry Professionals & More Local Professional Masterclasses & Workshops (for learning rather just "networking")
3. Try to define the demand of our industry to the region or to the audience at large as whole. Try to define the potential.

Other Promising Actions:

- An online database of local talent & resources. Must be vetted and pay member-dues. All resources from local production companies, to directors, to editors, to craft service, and truck rentals should all be listed.
- Re-build the education pipeline we once had (Collaborative Cinema) into a better structured program for more diversity, better storytelling, and more on-set experiences with industry professionals. The only real way to learn our trade is being doing it, experiencing it, and creating it together.
- Mentorship & Internship Programs; better structured and maybe built outside of the colleges if they themselves cannot support the programs efficiently.
- Teach storytelling more than anything else to K-12 students. More reading, writing, and practicing the story telling structure and process.
- Business classes/workshops just on business management. Our industry also needs entrepreneurs but just like any other start-up, they need support with finances, taxes, start-up capital, etc.

Networking (Local and External)

Due to the high level of interest in the topic of networking, the breakout discussion was divided into two tables. One group focused on “local networking”, i.e., strengthening network relationships within the Greater Milwaukee region (e.g., with independent professionals, in-house creatives, minority and hard to reach populations, etc.). The second group focused on external networking, i.e., building and strengthening network linkages beyond the region (e.g., with Madison, other parts of Wisconsin, Chicago, Austin, Los Angeles, and beyond). Each of these discussions is summarized in the sub-sections below.

Networking: Local (i.e., within the Greater Milwaukee Region)

Strategic Goals:

I. Stronger local networking opportunities and resources across the industry, connecting independent professionals, in-house creatives and more informal creatives.

II. Strengthen network relationships with minority filmmakers and creative professionals.

Top 3 Priority Actions:

1. Networking events- informal/formal, all-industry/role-focused
2. Physical Space/Hub
3. Internships/mentorship

Other Promising Actions:

- Connect to education/workforce for diversity pipeline development
- Local versions of online communities

Networking: External (i.e., beyond the Region)

This breakout group also adopted a slightly different approach than other tables. They began by defining three Strategic Goals, then developed 3-4 Priority Actions for each goal, and finally developed additional details for each of those actions. This summary is structured to reflect these different outputs of the group discussion.

Strategic Goals:

I. Turn Milwaukee into a co-production / buyer's market.
II. Bring streaming services, cable networks, distributors, and potential producer/investor connections to Milwaukee for networking.
III. Develop deeper ties to New York, L.A., and international locations.

Priority Actions for Each Strategic Goal:

I. Turn Milwaukee into a co-production / buyer's market.

- Establish digital presence for Milwaukee Film Community. Site should serve as a branded, online hub for both local parties and outside investors to use.
- Increase in-person project engagement
- Make Milwaukee Film a year-round hub to show outsiders all that we do

II. Bring streaming services, cable networks, distributors, and potential producer/investor connections to Milwaukee for networking.

- Invite every major funder network, streaming service, cable network, digital platform, news network, and both national and international distributors to Milwaukee Film Festival or physical hub location (if/when established)
- Schedule Master Classes/workshops with all of them.
- Utilize critical, nationally recognized assets to attract goal targets

III. Develop deeper ties to New York, Los Angeles, and international locations.

- Create deep and deliberate partnerships with NY and LA-based organizations
- Designate Milwaukee ambassadors on the coasts and abroad who will increase visibility and awareness of our MKE filmmaking community
- Send delegations to NY & LA for industry trips
- Establish a cultural agent in city government or hire a private agency for representation within government

Organizational Infrastructure

Strategic Goals:

I. Define and develop Leadership
II. Secure sustainable funding
III. Establish physical and virtual collaborative spaces

Top 3 Priority Actions:

1. Establish creative virtual space and physical spaces
2. Determine identify and leadership
3. Secure sustainable funding

Other Promising Actions:

- Compile best practices from other organizations
- Prioritize distribution of money
- Membership growth/dues

5.3 Summary of Proposed Priority Actions

As stated above, these embryonic action plans that were developed at the November 17th workshop are only a first iteration of the strategic goals and priority actions that will be further developed and fleshed out by the Action Teams over the coming year.

The table below lists all 24 of the priority actions proposed by the breakout groups at the November action planning workshop.

Exhibit 7. Summary of Proposed Priority Actions

Foundation Topic	Priority Actions
Funding and Investment	1. Create a fund for films 2. Increase distributor access/awareness 3. Enhance funder-filmmaker connectivity
Government Policy and Regulation	4. Create council for future coordinating organization (e.g., FilMKE) 5. Evaluate tax/subsidy climate for film and make recommendations 6. Obtain Wisconsin Economic Development Corporation (WEDC) funding to support growth of Milwaukee's film cluster
Workforce and Skills: K-12 Education	7. Develop communications plan to inform and underscore benefits of film education to key donors (both private and public) 8. Identify specific organizations and locations (see also, "hub") to facilitate professional development and strengthen network 9. Increase student exposure through partnerships, mentorships and collaboration
Workforce and Skills: Higher Education	10. Launch political activism to support higher education programs for film 11. Engage philanthropic support for endowed positions and scholarships 12. Establish film as a city priority and align education to that priority
Workforce and Skills: Professional Development	13. Take industry professionals into more schools to teach about industry, technology, and jobs 14. Support more visiting industry professionals, master classes, and workshops 15. Define the demand/potential for industry and communicate that to regional and other audiences
Networking: Local	16. Expand networking events 17. Create physical space/hub 18. Expand internships and mentorships
Networking: External	19. Establish digital presence for Milwaukee's film community (branded online hub) 20. Bring streaming services, cable networks, distributors, and producers/investors to Milwaukee for networking 21. Develop deeper ties with NY, LA, international hubs
Organizational Infrastructure	22. Determine identify and leadership 23. Secure sustainable funding 24. Establish creative virtual space and physical spaces

6. Next Steps

The November 17th Action Planning Workshop generated a wide range of ideas for potential actions that could be pursued by the emerging film cluster coalition, and it demonstrated that there is significant enthusiasm, energy, and desire for collaboration among stakeholders. The challenge now will be to focus energy on those actions that will be most impactful and achievable, and to channel all of that enthusiasm into sustained action.

The subsections below highlight three areas of activity that will be critical for maintaining momentum on the action planning process and successfully implementing priority actions to strengthen the cluster:

- Coordination, Leadership, and Communication;
- Additional Research and Analysis; and
- Development and Implementation of Priority Actions.

6.1 Coordination, Leadership, and Communication

In order to sustain the strong momentum that has already been established in this collaborative initiative, organizational mechanisms for coordination, decision-making, and communication should be formalized in early 2017. This will involve forming action teams to spearhead priority actions in each of the foundation areas; establishing an organizational structure to help coordinate and track implementation of those various actions; and defining leadership for the overall initiative to facilitate decision-making, fundraising, and advocacy. Each of these items is briefly discussed below.

- **Mobilize Action Teams:** The most immediate task is to establish the teams of stakeholders that will lead development of task-level details for the priority actions over the coming weeks and ultimately spearhead their implementation. A starting point for these action teams is the list of participants in each of the breakout groups from the November workshop, along with other stakeholders who volunteered their names to help. The final teams can be assembled creatively to combine related topics and ensure a robust skill mix of members. Ideally, one or two people would be designated as Leads for each Action Team to take responsibility for driving the agenda and organizing the work of the team. As of the time of writing, this process has already begun, but ICF recommends that these teams should be defined and formalized soon to avoid losing momentum.

- **Create Organizational Structure to Coordinate Efforts:** Beyond establishing individual teams to develop the priority actions, some amount of organizational structure should be put in place to help coordinate the multiple parallel initiatives, facilitate reporting, align timelines, and ensure accountability. A full-time or part-time staffer could be hired to play this coordinating secretariat role. The Organizational Infrastructure action team has already begun considering these issues and should take the lead on developing the needed structures and systems.

- **Define Leadership:** Clear leadership of this initiative will be critical to defining an identity and purpose for the organization and for enabling its effective ongoing operation. A leadership committee representing key stakeholder constituencies should be established in early 2017, and it should be structured to facilitate effective decision-making, fundraising, and advocacy. An individual leader/manager could also be identified to serve as the face of the initiative, helping to inspire action and communicate to cluster membership and external audiences. The Organizational Infrastructure team should again take the lead on developing a leadership plan for the initiative, and it should consult with members of the Government Policy team who proposed a related priority action to create a “Film Milwaukee Council” representing key film industry constituencies (see Appendix D for details).

6.2 Additional Research and Analysis

Several influential stakeholders observed that there are a number of topics outside the scope of this present study that should be studied in order to further support successful implementation of strategic actions. Topics proposed for additional research and analysis included:

- **Economic Impact and Market Analysis of Industry:** Model the full economic impact/value of the film industry to the regional or state economy in terms of output (GSP and tax revenue. This analysis would expand on the impact modeling of the annual Film Festival that has already been conducted, as well as a proposed Market Analysis (discussed below) to demonstrate the impact that a robust film industry has on sectors across the economy, both directly and indirectly.

  Beyond analyzing the vertical markets (i.e., the value chain) within the film industry, analyze the horizontal markets within the region that are served by cluster, i.e., the non-film industries in Wisconsin that are enhanced by film industry goods and services. This analysis would rely on the industry purchasing relationships (input-output matrix) used for Impact Modeling and further characterize the linkages between the core segments in the film industry and the broader economy, making the case that the growth of the film industry will spur regional economic development.
- **Occupational Wage Analysis:** Analyze the wage levels of various occupations within the industry and determine which jobs provide a living wage.
- **Research on Key Financial/Regulatory Issues:** Several complex issues were raised during the course of this study that merit further investigation. For instance, to inform efforts to ensure that Wisconsin offers a tax-favorable environment for the film industry, stakeholders called for additional research on best practices related to state tax incentives for film production and tax code treatment of film-related activities, and proposed an evaluation of Wisconsin’s tax/subsidy climate for the film industry.
- **Case Studies of Successful Peer Regions:** Study the successful efforts of key peer regions (e.g., Austin, Seattle, etc.) to build their film clusters and distill lessons and good practices that could inform efforts to build the Greater Milwaukee cluster. Special emphasis could be placed on studying topics such as tax policy/incentives, the development of physical and virtual networks, and the strengthening of organizational infrastructure.
- **Explore Potential Synergies with Other Regional Initiatives:** Explore potential synergies between the FILM Milwaukee initiative and other related efforts being pursued in the region. For example, stakeholders noted that Radio Milwaukee might be interested in pursuing similar cluster-based economic development strategies, so there might be benefit in

developing an expanded economic analysis and/or strategy which incorporates the broader spectrum of audiovisual media (e.g., radio, podcast, music, video, film, television, etc.).

- **Continued Action Planning Support:** Provide additional facilitation support to Action Teams to aid in the refinement, launching, and implementation of priority activities. Consider working one-on-one with each foundation group and then reconvening in 9 to 12 months to discuss progress and re-evaluate goals and plans. Facilitation support could be provided by FILM Milwaukee, ICF, or another organization.

Leadership of the FILM Milwaukee initiative should consider what additional research, analysis, and facilitation support would be most valuable in supporting the overall strategy and priority actions that will be pursued by the coalition in 2017. Particular emphasis should be placed on undertaking research and analyses that bolsters credibility with investors, grantmakers, the WEDC, and other key supporters.

6.3 Development and Implementation of Strategic Actions

The most critical component of this initiative will be the successful implementation of a few actions that have concrete and measurable impacts on the region's film industry and community. To achieve this, coalition leadership will need to select a few priority actions for early implementation, action teams will need to flesh out detailed task-level plans and launch implementation, and the coordinating organization (e.g., FILM Milwaukee) must monitor progress, evaluate effectiveness, and correct course as needed.

- **Prioritize Potential Actions:** Stakeholders at the November workshop generated a wide range of potential strategic actions to strengthen the region's film industry, and voted on the top three priority actions in each foundation category. The resulting list of 24 priority actions is shown in Exhibit 7 above. As this initiative shifts to a phase focused on implementation, coalition leadership should work with the newly constituted Action Teams to look anew at the range of potential actions and select the most urgent and impactful actions for implementation in early 2017. The actions selected should also be highly feasible, as it will be critical to achieve a few early "wins" that can be publicized to help maintain momentum and mobilize additional support.
- **Detailed Action Planning:** Action teams should begin developing detailed task-level plans for the agreed upon actions, describing what needs to be done, by whom, and by when. In some cases, the action teams can build on the initial action planning that was done at the November workshop (see Appendix D). To ensure consistency and comprehensiveness of these detailed action plans, a template should be provided to the action teams, listing the desired elements such as:
    - Detailed Description of Proposed Action
    - Immediate Next Steps
    - Longer-Term Steps
    - Key Dependencies/Risks
    - Stakeholders Involved
    - Potential Funding Sources
    - Timeline and Key Deadlines

- Evaluation Metrics and Monitoring Plan
- Names of Action Team Members

As stated above, additional facilitation could be provided—by FILM Milwaukee, ICF, or another organization—to help guide and support the ongoing refinement and launching of these actions.

- **Implement Actions:** Action teams should begin implementing the immediate next steps for each of the agreed priority actions in early 2017. Action team leads and members should coordinate implementation closely with Milwaukee Film leadership and other key stakeholders/partners.
- **Monitoring, Evaluation, and Course Correction:** Finally, FILM Milwaukee (or the organization that is ultimately established for coordinating the overall initiative) should work closely with the action teams to monitor implementation progress against timeline and key deadlines, evaluate effectiveness using agreed metrics and monitoring plan, and correct course as needed.

By implementing the strategic actions that were developed during the November 17 workshop, the FILM Milwaukee initiative will strengthen key input foundations that are critical to the ongoing growth and competitiveness of the region's film industry. These actions will help strengthen engagement and collaboration across the community and address many of the key challenges voiced by regional stakeholders. Furthermore, establishing the necessary organizational infrastructure for monitoring, coordination, and communication will ensure that the initiative has the capacity and leadership to adapt to changing conditions and community preferences. The Greater Milwaukee region is poised to take the critical next steps to grow the film industry and pave the way for it to become a significant driver of economic and cultural value for the region.

Appendices

Appendix A: Detailed Survey Methodology

In partnership with Milwaukee Film and the working group, ICF developed and implemented a web-based survey through SurveyMonkey to collect information directly from regional stakeholders about their perceptions of the industry. Specifically, the survey contained four sections:

- Respondent profile
- Perceptions of region and industry, by sector
- Identification of strengths, challenges and opportunities, by sector
- Respondent demographics

The survey was designed to get feedback from stakeholders who live or work in Greater Milwaukee and are involved in creating or supporting a wide range of film-related activities. The term “film-related activities” refers to a wide range of activities that include: the development of creative content; education instruction or administrative activity (K-12 and post-secondary); or broader supporting activities, such as regional marketing efforts, funding, and other support for the arts. Our goal was to define the film industry broadly, in order to include the voices of a wide range of participants and stakeholder in the region’s creative economy.

Examples of potential respondents include:

- People whose primary source of income is film-related creative activity, either working for an employer or as the owner of a film/creative business or on a freelance basis (e.g., production company, sound recording studio, video game production company, advertising agency, etc.)
- People whose primary source of income is film-related creative activity for an employer that is NOT a film-related/creative business (e.g., a videographer employed at an insurance agency or retailer)
- People who are engaged in film-related activity that is not related to their primary source of income
- Students, instructors or administrators at the K-12 or post-secondary level
- People who work in local government, local non-profits, funders, or other supporting institutions that provide support for regional marketing, financing, or creative activities.
- Private supporters who provide financial or in-kind support for film-related activity.

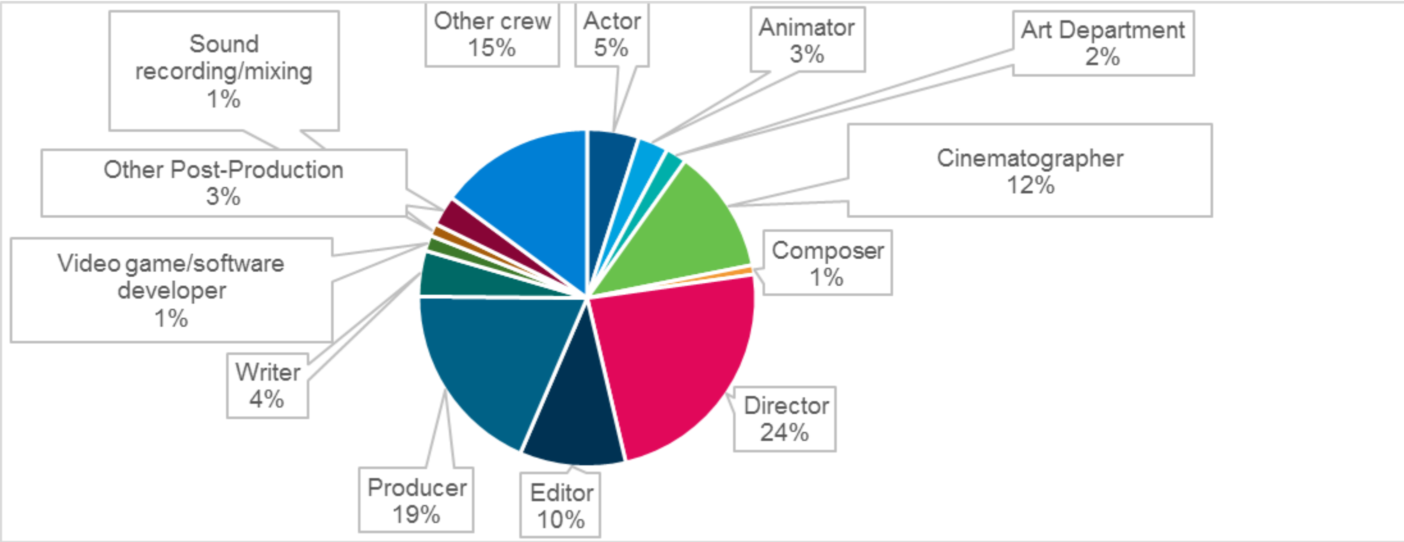
The survey link was sent to know individuals who were engaged in film-relate activity with a request to further disseminate the link. The survey collected responses over a six-week period from August 30, 2016 through October 10, 2016. The survey received 767 responses. Key results from each section of the survey are presented below.

Respondent Profile

Fifty-one percent of respondents self-identified as being a filmmaker, artist or other creative, 32% self-identified as a film student or educator and 17% self-identified as a film-supporter. Of those who identified as being a film creative, 47% worked or own a creative business, 22% are engaged in film-related activity outside of their primary source of income, 21% work as a freelancer and 10% consider themselves in-house creatives, doing creative work but employed by a non-creative industry. Of those who identified as a film student or educator, the majority

(65%) are students and 27% are instructors or administrators in a post-secondary setting. The remainder are engaged with youth, either in a K-12 setting or outside of school. Exhibit 8 provides greater granularity for respondents who identified as a filmmaker, artist or other creative and show the great diversity of talent in the Greater Milwaukee region.

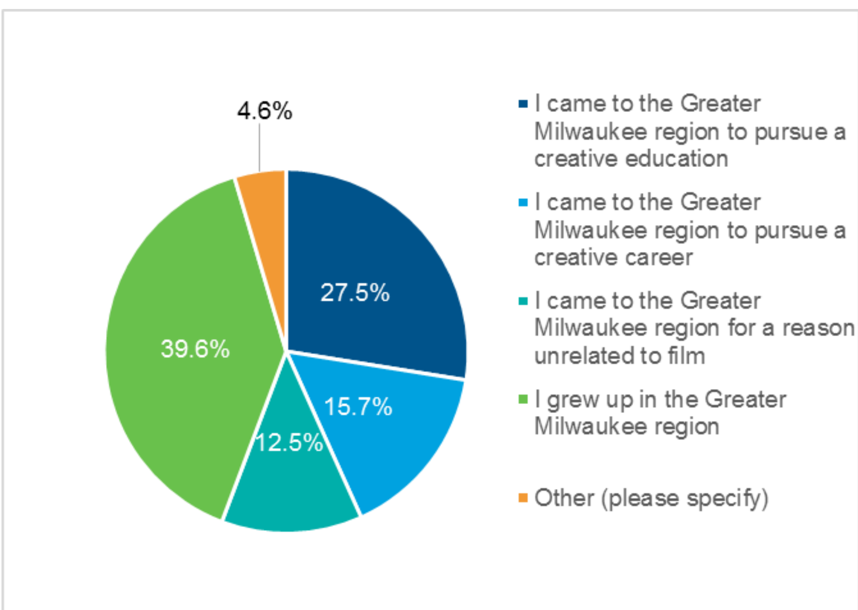
Exhibit 8. Filmmaker, artist and other creative respondents



Source: ICF Milwaukee Film Survey

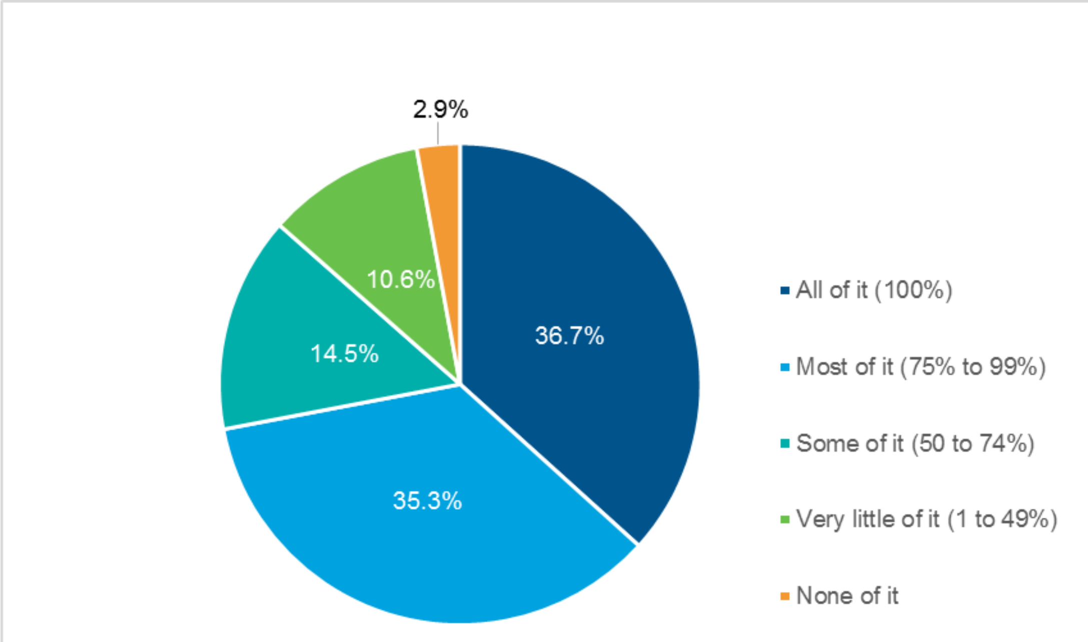
The vast majority (90%) of respondents live in Greater Milwaukee, but only 37% of them are from the area originally. Seventy-two percent of respondents indicated that 75% or more of their film-related activity takes place in Greater Milwaukee.

Exhibit 9. Reason for Being in Greater Milwaukee



Source: ICF Milwaukee Film Survey

Exhibit 10. Percentage of film-related activity in Greater Milwaukee



Source: ICF Milwaukee Film Survey

Key Perceptions of Region and By Respondent Segment

Below are the key perceptions of the region's film industry, identified by survey respondents:

- **Great Place to Work:** 63% of respondents feel that Greater Milwaukee is a great place for filmmakers and other creatives to work
- **Region Attracts Talent:**
    - 43% of survey respondents indicated they moved to Greater Milwaukee to pursue creative education or career
    - 62% of student respondents came to the Greater Milwaukee region to pursue a creative education
- **Vital to the Economy:** 67% of supporter respondents believe that the film industry is a vital part of the Greater Milwaukee economy
- **Key Part of the Art Scene:** 93% of supporter respondents believe that film is a vital part of Greater Milwaukee's art scene

Specifically, the majority of film creatives believe they have access to community and resources, but that the Greater Milwaukee film industry is not diverse. The majority of film creative respondents feel that they are able to find directors and crew for their projects but less than 40% of film creative respondents indicated that it was easy to final local freelance work, while less than 35% indicated that it was easy to final non-local freelance work. The majority (52%) of film creative respondents reported that it was difficult to find funding for projects.

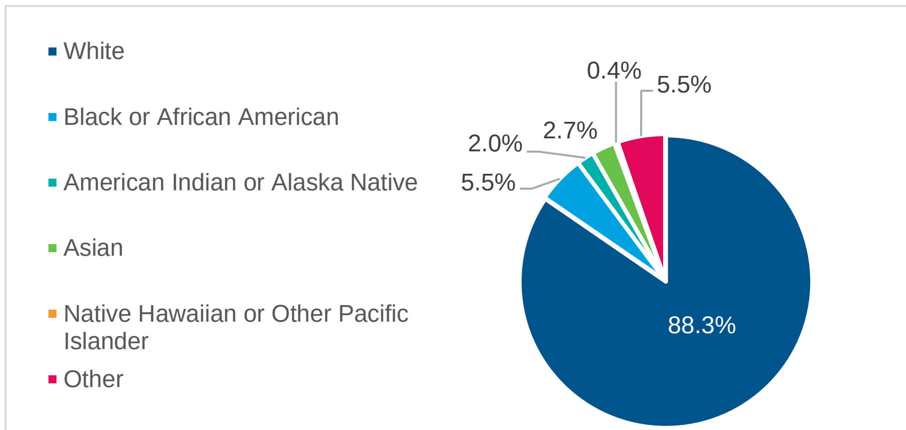
The survey results also pointed to the fact that a significant amount of film activity is done within non-film related organizations as well as outside work by in-house creatives -- 81% of in-house creative respondents engage in film projects outside of formal work. The creative work that is being done in non-creative industries is being done by staff within those organizations. On average, it was reported that 74% of company creative work is done in-house instead of being contracted out. Lastly, there has been little growth in these activities recently; only 34% of in-house creative respondents indicate that creative staff at their organization has increased over the past 3 years.

There was strong sentiment that post-secondary graduates from local institutions have creative and technical skills but are not able to find local work locally. Specifically, 75% of respondents felt that post-secondary students receive the creative training needed to be successful in the film industry and 67% of respondents felt that post-secondary students receive the technical training needed to be successful in the film industry. Only 32% of respondents felt that post-secondary students receive the business training they need to be successful in the film industry. Less than half (40%) of respondents felt that students were able to find careers in the local film industry

Respondent demographics

The key demographic finding from the survey relates to the lack of racial diversity. 88.3% of survey respondents self-identify as white. This finding is consistent with federally collected industry data on those employed in the film industry. According to these data, 91% of the industry identifies as white.

Exhibit 11. Respondent Demographics



Source: ICF Milwaukee Film Survey

Appendix B: Detailed Industry Data

List of Industries (NAICS Codes) Analyzed

NAICS Code	Description
541810	Advertising Agencies
541922	Commercial Photography
512290	Other Sound Recording Industries
541921	Photography Studios, Portrait
515120	Television Broadcasting
711510	Independent Artists, Writers, and Performers
711190	Other Performing Arts Companies
511210	Software Publishers
512131	Motion Picture Theaters (except Drive-Ins)
512240	Sound Recording Studios
512132	Drive-In Motion Picture Theaters
512191	Teleproduction and Other Postproduction Services
512199	Other Motion Picture and Video Industries
512110	Motion Picture and Video Production
519130	Internet Publishing and Broadcasting and Web Search Portals
512120	Motion Picture and Video Distribution

List of Occupations (SOC codes) Analyzed

SOC Code	Description
11-2011	Advertising and Promotions Managers
25-9011	Audio-Visual and Multimedia Collections Specialists
27-1011	Art Directors
27-1014	Multimedia Artists and Animators
27-1027	Set and Exhibit Designers
27-2011	Actors
27-2012	Producers and Directors
27-4011	Audio and Video Equipment Technicians
27-4012	Broadcast Technicians
27-4014	Sound Engineering Technicians
27-4031	Camera Operators, Television, Video, and Motion Picture
27-4032	Film and Video Editors
39-3021	Motion Picture Projectionists
39-3031	Ushers, Lobby Attendants, and Ticket Takers
39-5091	Makeup Artists, Theatrical and Performance

Industry Size, Growth and Concentration

Industry Sector	Employment (2015)	% Change (2010-15)	LQ (2015)
Independent Artists, Writers, and Performers	7,166	10%	0.91
Advertising Agencies	1,900	10%	1.13
Software Publishers	1,504	10%	0.62
Photography Studios, Portrait	1,290	6%	0.98
Television Broadcasting	887	14%	0.98
Motion Picture Theaters (except Drive-Ins)	506	-8%	0.58
Motion Picture and Video Production	451	-6%	0.25
Commercial Photography	395	-4%	1.08
Internet Publishing and Broadcasting and Web Search Portals	302	-1%	0.21
Other Performing Arts Companies	53	68%	0.67
Sound Recording Studios	52	-22%	0.51
Teleproduction and Other Postproduction Services	41	2%	0.27
Other Sound Recording Industries	38	93%	1.06
Motion Picture and Video Distribution	<10	-22%	0.16
Other Motion Picture and Video Industries	<10	11%	0.26
Drive-In Motion Picture Theaters	<10	-66%	0.37

Source: EMSI Industry data, 2010, 2015

Occupation Size, Growth and Concentration

Occupation	Employment (2015)	% Change (2010-15)	LQ (2015)
Ushers, Lobby Attendants, and Ticket Takers	1,141	4%	1.44
Art Directors	787	6%	1.01
Actors	660	5%	0.8
Multimedia Artists and Animators	529	3%	0.72
Producers and Directors	526	1%	0.56
Audio and Video Equipment Technicians	459	4%	0.76
Broadcast Technicians	457	5%	2.29
Advertising and Promotions Managers	283	7%	1.10
Camera Operators, Television, Video, and Motion Picture	156	17%	0.70

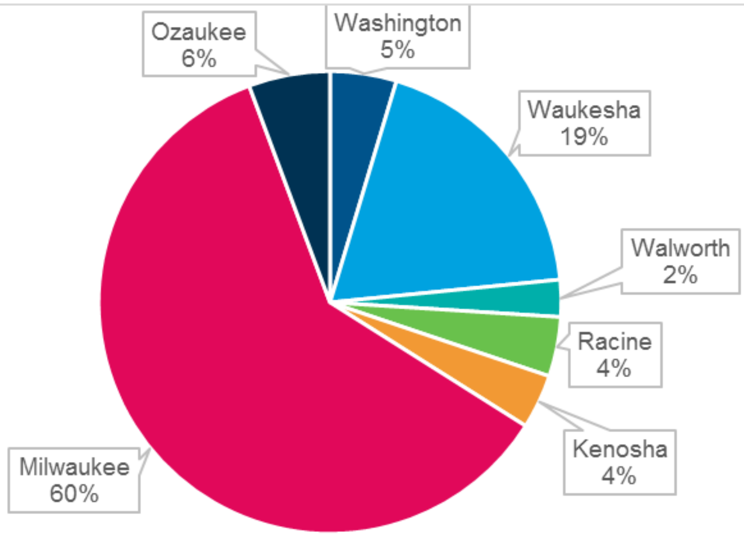
Film and Video Editors	132	24%	0.43
Sound Engineering Technicians	126	7%	0.76
Audio-Visual and Multimedia Collections Specialists	111	0%	1.85
Set and Exhibit Designers	111	9%	0.79
Motion Picture Projectionists	40	-16%	0.98
Makeup Artists, Theatrical and Performance	30	-8%	0.60

Source: EMSI Industry data, 2010, 2015

Industry Earnings and Sales (2014)

Industry	Earnings	Sales
Software Publishers	$145,874,585	$483,559,323
Advertising Agencies	$138,109,447	$357,907,185
Television Broadcasting	$70,471,028	$242,419,824
Independent Artists, Writers, and Performers	$89,656,470	$156,170,944
Motion Picture and Video Production	$23,035,886	$90,605,729
Motion Picture Theaters (except Drive-Ins)	$21,823,832	$90,555,915
Photography Studios, Portrait	$17,472,522	$45,857,633
Commercial Photography	$15,657,207	$40,713,775
Internet Publishing / Broadcasting and Web Search Portals	$5,811,806	$17,344,837
Teleproduction and Other Postproduction Services	$2,861,158	$11,330,148
Sound Recording Studios	$1,312,116	$9,568,095
Other Performing Arts Companies	$1,093,013	$3,049,555
Motion Picture and Video Distribution	$501,825	$2,045,262
Other Sound Recording Industries	$161,173	$1,183,646
Drive-In Motion Picture Theaters	$218,455	$896,342
Other Motion Picture and Video Industries	$38,855	$156,781
Total	**534,099,377**	**1,553,364,994**

Geography of Industry Employment



Source: EMSI Industry data, 2015

Wage Findings

Average Yearly Earnings by Industry (2014)

Industry	Average Annual Earnings
Software Publishers	$94,847
Television Broadcasting	$78,915
Advertising Agencies	$70,536
Teleproduction and Other Postproduction Services	$65,026
Motion Picture and Video Distribution	$50,183
Motion Picture and Video Production	$49,754
Commercial Photography	$33,242
Other Performing Arts Companies	$24,841
Motion Picture Theaters (except Drive-Ins)	$22,000
Sound Recording Studios	$18,745
Internet Publishing and Broadcasting and Web Search Portals	$17,349
Drive-In Motion Picture Theaters	$15,604
Independent Artists, Writers, and Performers	$13,500
Photography Studios, Portrait	$12,895
Other Sound Recording Industries	$8,483
Other Motion Picture and Video Industries	$7,771
AVERAGE	**$ 36,481**

Source: EMSI Industry data, 2014

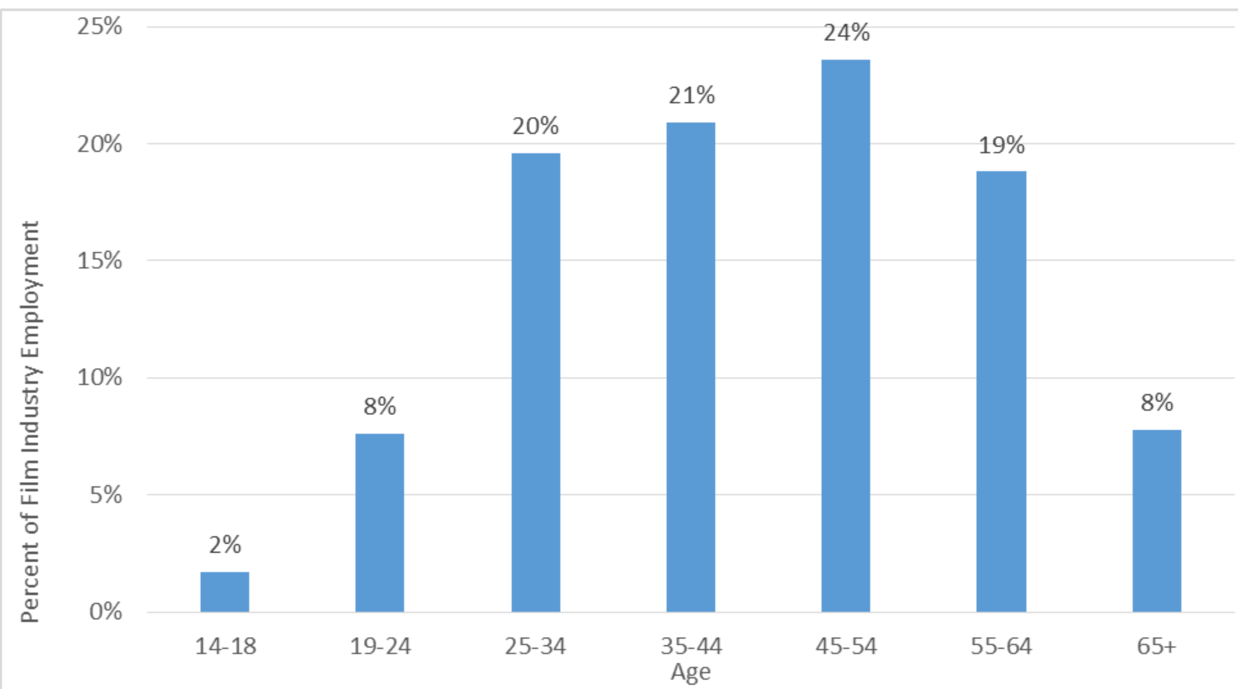
Average Hourly Earnings by Occupation (2015)

Occupation	Average Hourly Earnings
Advertising and Promotions Managers	$ 43.79
Broadcast Technicians	$ 29.84
Producers and Directors	$ 24.94
Art Directors	$ 23.79
Sound Engineering Technicians	$ 22.37
Actors	$ 21.84
Film and Video Editors	$ 20.91
Makeup Artists, Theatrical and Performance	$ 20.89
Audio-Visual and Multimedia Collections Specialists	$ 20.05
Audio and Video Equipment Technicians	$ 18.83
Set and Exhibit Designers	$ 17.86
Camera Operators, Television, Video, and Motion Picture	$ 16.31
Motion Picture Projectionists	$ 12.76
Multimedia Artists and Animators	$ 11.08
Ushers, Lobby Attendants, and Ticket Takers	$ 9.29
AVERAGE	**$ 27.76**

Source: EMSI Industry data, 2015

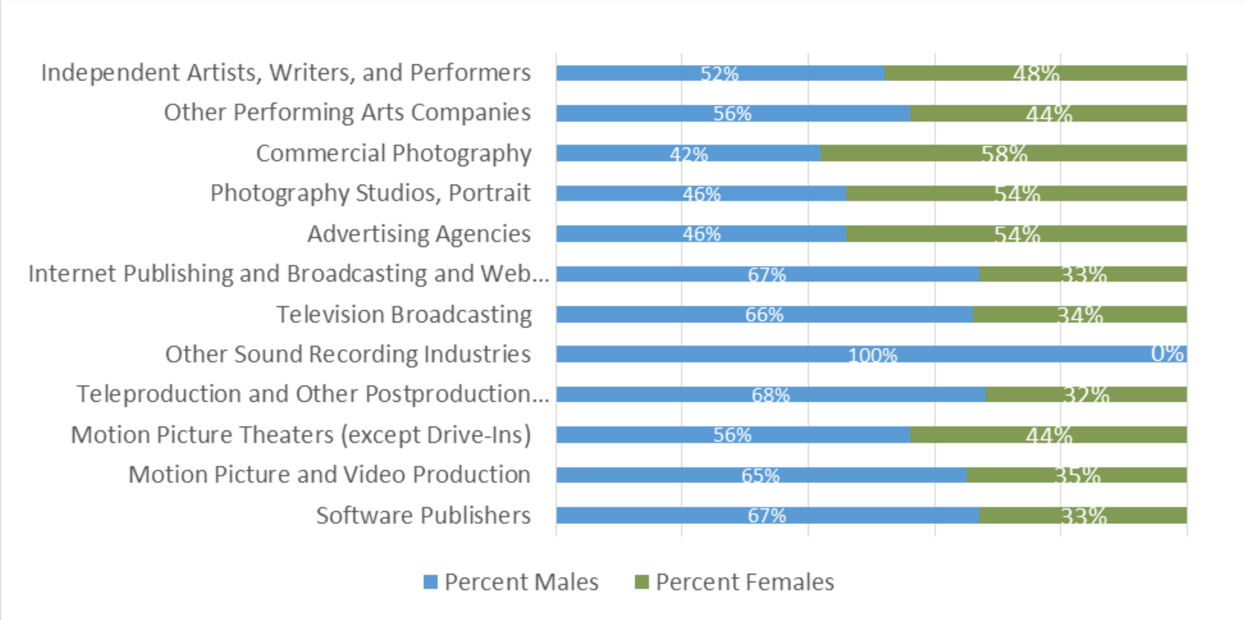
Industry Demographics

Industry Age Distribution



Source: EMSI Industry data, 2015

Gender Distribution in Select Industries



Source: EMSI Industry data, 2015

Education Pipeline

Education Programs (CIP codes)

Code	Description
09.0402	Broadcast Journalism
09.0701	Radio and Television
09.0702	Digital Communication and Media/Multimedia
09.0799	Radio, Television, and Digital Communication, Other
09.0900	Public Relations, Advertising, and Applied Communication
09.0902	Public Relations/Image Management
09.0903	Advertising
09.0999	Public Relations, Advertising, and Applied Communication, Other
10.0201	Photographic and Film/Video Technology/Technician and Assistant
10.0202	Radio and Television Broadcasting Technology/Technician
10.0203	Recording Arts Technology/Technician
10.0299	Audiovisual Communications Technologies/Technicians, Other
10.0304	Animation, Interactive Technology, Video Graphics and Special Effects
12.0406	Make-Up Artist/Specialist
50.0102	Digital Arts
50.0401	Design and Visual Communications, General
50.0402	Commercial and Advertising Art
50.0406	Commercial Photography
50.0409	Graphic Design
50.0501	Drama and Dramatics/Theatre Arts, General
50.0502	Technical Theatre/Theatre Design and Technology
50.0504	Playwriting and Screenwriting
50.0506	Acting

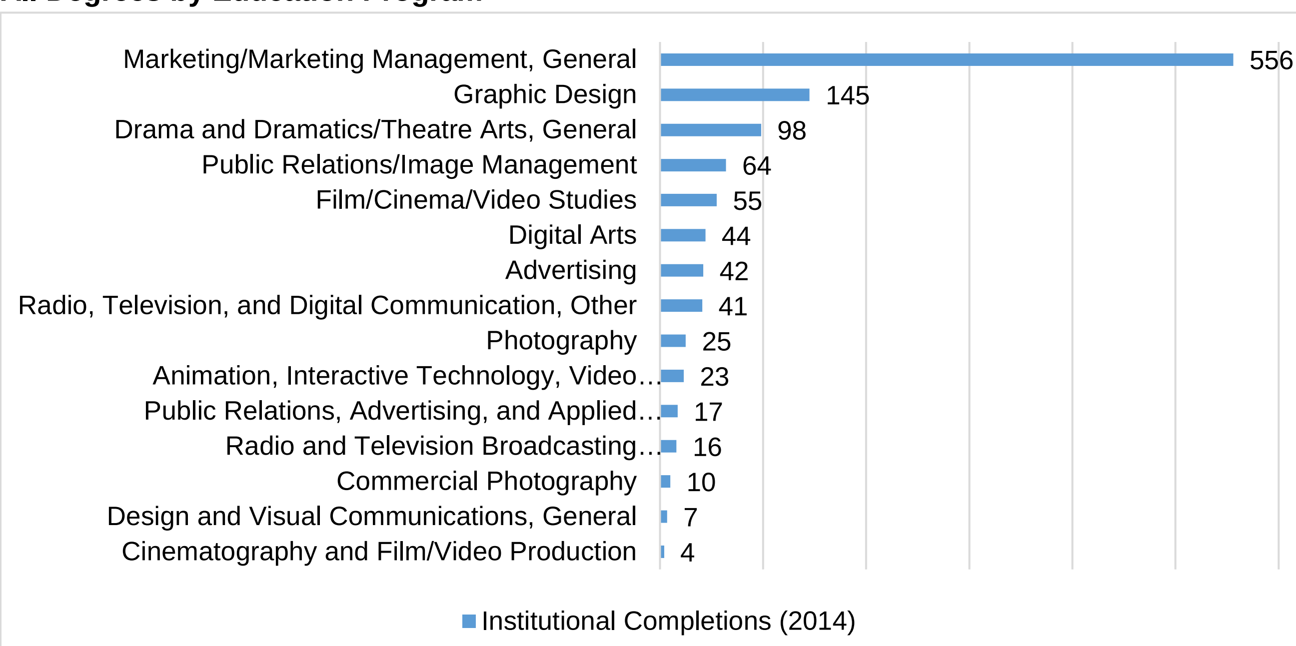
50.0507	Directing and Theatrical Production
50.0599	Dramatic/Theatre Arts and Stagecraft, Other
50.0601	Film/Cinema/Video Studies
50.0602	Cinematography and Film/Video Production
50.0605	Photography
50.0607	Documentary Production
50.0699	Film/Video and Photographic Arts, Other
50.0706	Intermedia/Multimedia
50.1001	Arts, Entertainment,and Media Management, General
50.1099	Arts, Entertainment, and Media Management, Other
50.9999	Visual and Performing Arts, Other
52.1401	Marketing/Marketing Management, General

All Degrees by Type

Degree Type	Number of degrees completed, 2015
Associates degree	194
Bachelors degree	934
Masters degree	21
All Degrees	**1,149**

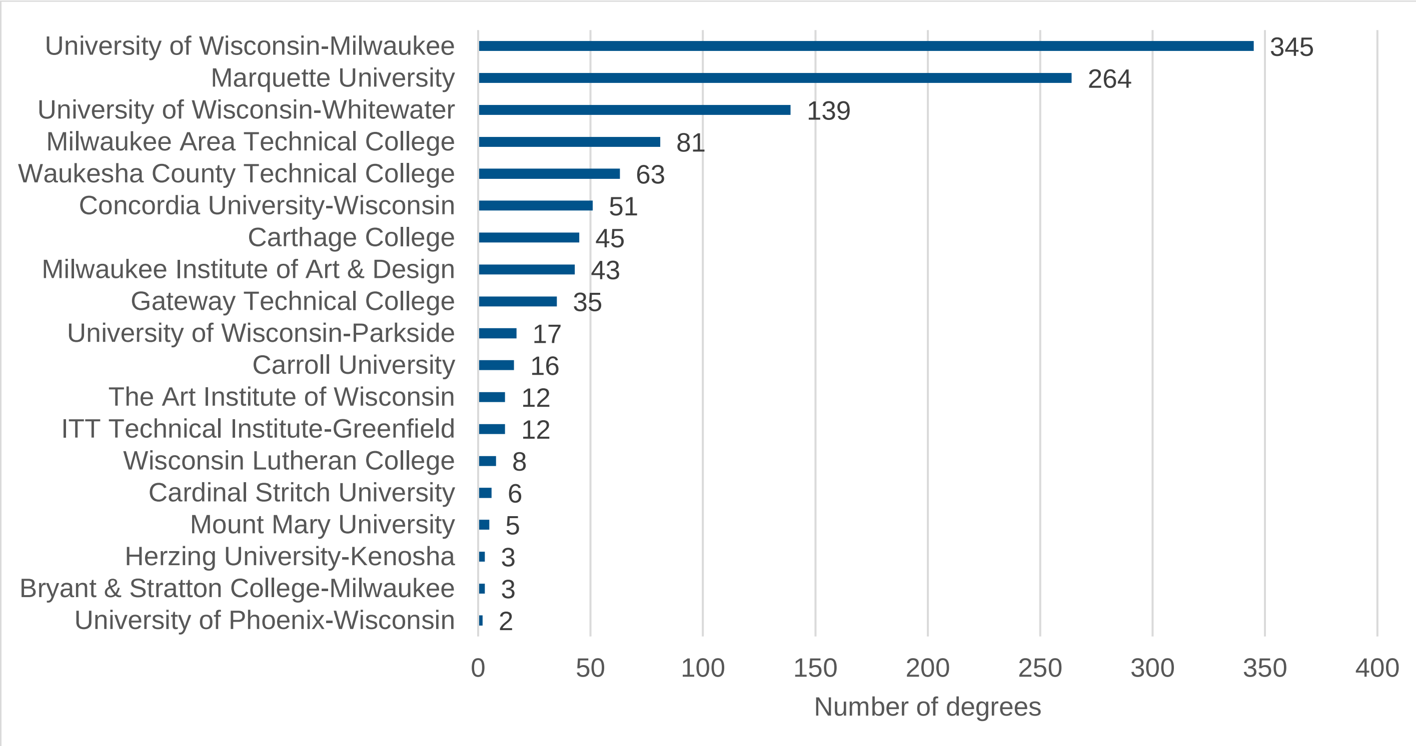
Source: EMSI Industry data, 2015

All Degrees by Education Program



Source: EMSI Industry data, 2015

Degree Completion by Institution



Source: EMSI Industry data, 2015

Appendix C: Action Planning Workshop Participants

Kyle Arpke	Mark Foote	Brad Lichtenstein	Lisa Sutcliffe
Alice Austen	Timm Gable	Gail MacAskill	Andrew Swant
Megan Benedict	Katie Heil	Kirill Mikhanovsky	Tami Sweeney
Dick Blau	Jonathan Jackson	Susan Mikulay	Colin Sytsma
Randy Bobo	Nada Johnson	Kim Miller	Sitora Takanaev
Amelia Bursi	Suzanne Jurva	Jeff Morin	Erica Thompson
Michael Brown	Dan Kattman	David Murphy	John Torinus
Lisa Caesar	Laura Kezman	Cara Ogburn	George Tzougros
Laketta Caldwell	Michael Koss	Tiff Pua	Rachel VanderWeit
Kristin Coates	Ira Klusendorf	Maureen Post	Michael T. Vollman
James Cutting	Ken Krei	Kurt Raether	Tyshun Wardlaw
Gail DeClark	Jim Kreuter	Lynn Reif	Lashondra Scott
Bob Donnelly	Jeff Kurz	Steve Roeder	Rubin Whitmore II
Joe Duellman	Kirsten Larson	Mark Sabljak	Rob Yeo
Scott Emmons	Steve Laughlin	Jay Schillinger	Bohdan Zachary
Karen Erbach	Emilia Layden	Lashondra Scott	Milan Zori
Jessica Farrell	Lisa Ledford-Kerr	Vassi Slavova	

Appendix D. Action Plan Workshop Breakout Group Summaries

Each breakout table was asked to summarize the outcomes of their conversation using the templates shown in Exhibit 12, below.

Exhibit 12. Templates Used for Breakout Group Reporting

STRATEGIC PLANNING PROCESS

Template #1 – Summary of Goals & Priority Actions

Breakout Table / Foundation Name: *(e.g., Funding & Investment)*

Strategic Goals:

1.
2.

Top 3 Priority Actions:

1.
2.
3.

Other Promising Actions: *(beyond the top 3 vote-getters)*

-
-
-
-
-

Film Industry Study

STRATEGIC PLANNING PROCESS

Template #2 – Details of Top Three Actions

1. **Description of proposed Strategic Action:**
2. **Immediate Next Steps:**
   –
   –
3. **Longer-Term Action Steps:**
   –
   –
4. **Key Dependencies/Risks:**
   –
   –
5. **Other Stakeholders that should be involved:**
   –
   –
6. **Volunteers to join Action Teams for ongoing development/implementation:**
   –
   –

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The pages that follow are the unedited outputs of this process, summarizing each breakout group's proposed strategic goals, top three priority actions, other promising actions, and some preliminary details for each of their top three proposed actions.

Breakout Group Summary: Funding and Investment

Key Assets and Challenges

Key Assets of the Region:

- High enthusiasm about funding films
- Access to local funding has been increasing
- Film festival provides cash awards to winning entries

Key Challenges in the Region:

- Lack of awareness of project funding options and/or knowledge of how to apply*
- Lack of access to local project funding*
- Lack of significant local consumer base for films
- Lack of access for film to some institutional funders such as UPAF
- Legal complexities around fiscal sponsorship

Strategic Goals

I. Increase access to and visibility of sustainable funding for local filmmakers, local film projects & local film businesses.

Top 3 Priority Actions

1. Fund for Films
2. Distributor Access/Awareness
3. Funder Filmmaker Connectivity

Other Promising Actions

- Grant Training Resources, Awareness, Workshops
- Diversify Funding Sources: Film Incentives & Banking
- Fiscal Sponsorship Improved Option for Commercial Projects
- Stronger link to Entrepreneurial community and conversation
- Case Studies of Successful Film Projects
- Database of Funding Opportunities
- Buy Local Initiative, i.e. use local filmmakers, ad agencies, more
- Pay Yourself Initiative, i.e. all project budgets must include compensation for maker
- Invite Ad agencies to film festival for local screenings and networking after

Funding & Investment – Priority Action #1: Fund for Films

1. **Description of Proposed Strategic Action:** Create Fund(s) for Filmmaking

2. **Immediate Next Steps:**

   - Expand Brio Forward Fund (9 stickers)

3. **Longer-Term Action Steps:**

   - VC $15 million Fund (17 stickers)
   - $1 million+ Fund w/return on success (Bright Star Wi Model) (6 stickers)
   - Crowd Sourced Fund for MKE Projects
   - Fund for artists not specific projects (8 stickers)

4. **Key Dependencies/Risks:**

   - Viability of local venture fund

Funding & Investment – Priority Action #2: Distributor Access/Awareness

1. **Description of Proposed Strategic Action:** Improve Access to and Awareness of Distributors

2. **Immediate Next Steps:**

   - Distributor attendance, buy-in, engagement at annual Milwaukee Film Festival (12)

3. **Longer-Term Action Steps:**

   - Outreach Market as a whole to distributors (1)
   - Resource Database of Distributors (1 Sticker)
   - Leverage Existing Connections of Filmmakers
   - Year-Round Distributor Trips to MKE

4. **Key Dependencies/Risks:**

   - Perhaps this initiative is more related to the “Networking-External” foundation category, rather than funding. Distributors today are rarely a funding source.

Funding & Investment – Priority Action #3: Funder-Filmmaker Connectivity

1. **Description of Proposed Strategic Action:** Create stronger connections and opportunities for funders to connect to filmmakers

2. **Immediate Next Steps:**

   - Opportunity for one on one interviews between filmmakers and funders (8 stickers)
   - Networking events for filmmakers and funders
   - Pitch events (original local and national)

3. **Longer-Term Action Steps:**

   - Database/resource of funders and projects (3 stickers)

Breakout Group Summary: Government Policy & Regulation

Key Assets and Challenges

Key Assets of the Region:

- Milwaukee region's relatively small bureaucracy (e.g., compared with Chicago and LA) might make it easier to cut through red tape and expedite productions.

Key Challenges in the Region:

- Lack of film incentives makes it extremely difficult to attract large-scale productions.
- Tax code doesn't support film industry*
- Broader regulatory environment unsupportive
- Confusing permitting processes and lack of a central hub for information

Strategic Goals

I. To make Milwaukee an internationally recognized center of film culture, commerce, and technology. (a re-statement of the cluster vision)

II. Create Milwaukee film cluster, including UWM and Milwaukee Film, et. al.

III. Ensure that Wisconsin is tax-favorable to the film industry.

Top 3 Priority Actions

1. Create Film Milwaukee council, including leaders from commerce, Milwaukee Film, UWM Film Department, K-12
2. Evaluate tax/subsidy climate for film and make recommendations.
3. Win Wisconsin Economic Development Corporation (WEDC) funding help for Film Milwaukee cluster.

Other Promising Actions

- As part of above, create a political advocacy arm.

Govt. Policy – Priority Action #1: Create Film Milwaukee Council

1. **Description of Proposed Strategic Action:**

   Create council for future coordinating organization (e.g., FilMKE)

2. **Immediate Next Steps:**

- Determine Council purpose and make-up
- Recruit Council members, leaders from
  - Industry
  - Academia
  - Cultural world
  - Government
  - Entrepreneurs

3. **Longer-Term Action Steps:**

- Win endorsement from "Hitters" in region
  - Greater Milwaukee Committee (GMC), Milwaukee 7 (M7), MMAC (Metropolitan Milwaukee Association of Commerce (MMAC)
  - Mayors
  - County leaders
  - Legislators
  - Wisconsin Economic Development Corporation/Wisconsin Arts Board

4. **Other Stakeholders that should be involved:**

- Industry tax attorneys, accountants
- Representatives of WI Department of Revenue, WI Economic Development Corporation
- Volunteers from throughout the cluster.

Government Policy & Regulation – Priority Action #2: Evaluate Tax Climate

1. **Description of Proposed Strategic Action**:

   Evaluate tax climate for film industry and make recommendations.

2. **Immediate Next Steps**:

   - Identify tax problems
     - Sales tax
     - Income tax
     - Investor tax
     - Property Tax
   - Identify tax opportunities (we see 1 and 2 as two parts of a whole)
     - Investment credits across endemic industry
     - Income tax breaks ala manufacturing and agri-business

3. **Longer-Term Action Steps**:

   - Create a political action arm for the cluster.

4. **Other Stakeholders that should be involved**:
   - Industry tax attorneys, accountants
   - Representatives of WI Department of Revenue, WI Economic Development Corporation

Government Policy & Regulation – Priority Action #3: Secure WEDC Funding

1. **Description of Proposed Strategic Action**:

   Win Wisconsin Economic Development Corporation Funding

2. **Immediate Next Steps**:

   - Use cluster concept to win council seed funding.
   - Get Governor Walker and Senator Darling to back Film Milwaukee.

3. **Longer-Term Action Steps**:

   - Enlist millennials via documentaries.

4. **Other Stakeholders that should be involved**:

   - Volunteers from throughout the cluster.

Breakout Group Summary: Workforce Skills – K-12 Education

Key Assets and Challenges

Key Assets of the Region:

- Local creative collaborators and mentors
- Significant local filmmaking talent, including crew and production companies
- Access to top post-secondary educational programs

Key Challenges in the Region:

- Limited K-12 film programming
- Lack of access to diverse talent pool
- Very difficult to keep young talent from relocating to other local markets

Strategic Goals

I. Inform and educate key stakeholders in order to facilitate funding

II. Provide professional development to strengthen K-12 educator network

III. Create opportunities to broaden student access to the field

Top 3 Priority Actions

1. Develop communications plan to inform and underscore benefits of film education to key donors (both private and public)
2. Identify specific organization and location (see also, "hub") to facilitate professional development and strengthen network
3. Increase student exposure through partnerships, mentorships and collaboration

Other Promising Actions

- Motivate film industry to lobby for K-12 funding
- Survey underserved schools to identify need for technology
- Promote programs that highlight low-tech, accessible filmmaking practices
- Leverage A.C.P. to support actions (i.e., certification = $$$)
- Develop educator networking database for space and resource sharing

K-12 Education – Priority Action #1: Develop Communications Plan

1. **Description of Proposed Strategic Action:**

   Develop communications plan to inform and underscore benefits of film education to key donors (both private and public)

2. **Immediate Next Steps:**

   - Identify key stakeholders
   - Gather information to present to stakeholders (broad benefits of film education)
   - Identify individuals with relevant skill sets

3. **Longer-Term Action Steps:**

   - Launch plan within 2017-18 academic year
   - Implement long-term, repeated donation pool

4. **Key Dependencies/Risks:**

   - Information presented must be well-researched and clearly represented

5. **Other Stakeholders that should be involved:**

   - Employers
   - Media
   - School districts
   - Policy makers
   - Post-secondary institutions
   - Business Orgs (i.e., rotary club)

K-12 Education – Priority Action #2: Identify Organization/Location for Prof. Devt.

1. **Description of Proposed Strategic Action:**

   Identify specific organization and location (see also, "hub") to facilitate professional development and strengthen network

2. **Immediate Next Steps:**

   - Identify leaders (i.e., educators, orgs)
   - Research existing models and best practices (i.e., Tribeca - ask Brad Lichtenstein)

3. **Longer-Term Action Steps:**

   - Build network and database for professional development opportunities

4. **Key Dependencies/Risks:**

   - Cost and time

5. **Other Stakeholders that should be involved:**

   - School Districts
   - Donors

K-12 Education – Priority Action #3 – Increase Student Exposure to Film Industry

1. **Description of Proposed Strategic Action:**

   Increase student exposure to film industry through partnerships, mentorships and collaboration

2. **Immediate Next Steps:**

   - Identify collaborators, volunteers, supporters
   - Identify potential program partnerships
   - Leverage existing programs (i.e., career days)

3. **Longer-Term Action Steps:**

   - Put plan in place by 2017-18 academic year

4. **Key Dependencies/Risks:**

   - Requires successful collaboration

5. **Other Stakeholders that should be involved:**

   - TBD

Breakout Group Summary: Workforce Skills–Higher Ed

Note: *This breakout group adopted a slightly different approach than other tables. They began presented three Strategic Goals with 2-4 Priority Actions identified for each goal. As a result, this summary is structured to reflect these outputs of the group discussion.*

Key Assets and Challenges

Key Assets of the Region:

- Access to top post-secondary educational programs
- Over 900 bachelor's degree granted locally in creative industry related-fields

Key Challenges in the Region:

- Very difficult to retain young talent from relocating to other markets
- Lack of funding limits post-secondary programming and technology offerings
- Only 32% of survey respondents felt that post-secondary students receive the business training that they need to be successful in the film industry.

Strategic Goals & Priority Actions

I. Increase funding for media arts programs in higher education.

- Political activism of MKE Film Board and Supporters is needed to help university and government policy makers understand that higher ed is crucial to developing the film industry.
- Industry support for positions, scholarships, internships, equipment.
- Philanthropic support for endowed positions and scholarships.

II. Strengthen the skills pipeline from K-12 → Higher Ed → Industry.

- Establish film as a city priority and align education to that priority.
- Create special minority scholarships.
- Strengthen relationships between higher ed and public schools. (1 dot)
- Provide students with workforce survival skills. (1 dot)

III. Build more work opportunities for local/national talent.

- Establish partnerships between industry and higher education, e.g. projects.
- Promote higher education as a resource for the industry.

Other Promising Actions

- Create a network within MKE Film of people within universities.
- Create an annual calendar of events that build a film culture, then tie outreach to that calendar.

- Create higher education collaborations with high school and middle school “film” programs.
- Teach students to work with changing technology.
- Offer broad art training, not just technical. Teach the art, the commercial will follow.
- Become comfortable with the amorphous, unknown (this is what arts do).
- Paid internships for students.
- Create multi-institution curriculum that leads to film institute – save money, cut duplication. (1 dot)
- Provide practical arts & business workshops for students & community.
- Utilize language that embraces critical thinking, cultural production.

Breakout Group Summary: Workforce Skills – Professional Development

Key Assets and Challenges

Key Assets of the Region:

- Local creative collaborators and mentors*
- Moderate size pool of local filmmaking talent, including crew and production companies
- Access to top post-secondary educational programs
- Lower cost of living to retain workforce

Key Challenges in the Region:

- Very difficult to keep young talent from relocating to other local markets
- Lack of access to diverse talent pool
- Limited pool of well-skilled editing teams
- Limited on-set crew depth for feature film production
- Local crew not accustomed to intense demands of working on big budget productions
- Limited K-12 film programming; lack of training for K-12 teachers to discuss film
- Lack of funding limits post-secondary schools programming and tech
- Only 32% of respondents felt that post-secondary students receive the business training they need to be successful in the film industry.

Strategic Goals

I. Develop and Retain Talent in M7 Region

II. Define the demand for our industry, since we now know the supply

III. Foster collaboration between current industry and educational partners

Top 3 Priority Actions

1. Take Industry Professionals into more schools (K-12 and Colleges) to teach more about our industry, technology, and jobs
2. More Visiting Industry Professionals & More Local Professional Masterclasses & Workshops. More “workshops” for learning rather just “networking” events. People want to spend their time learning or getting something from the event, not just playing games.
3. Try to define the demand of our industry to the region or to the audience at large as whole. Try to define the potential.

Other Promising Actions

- An online database of local talent & resources. Must be vetted and pay member-dues. All resources from local production companies, to directors, to editors, to craft service, and truck rentals should all be listed.
- Re-build the education pipeline we once had (Collaborative Cinema) into a better structured program for more diversity, better storytelling, and more on-set experiences with industry professionals. The only real way to learn our trade is being doing it, experiencing it, and creating it together.
- Mentorship & Internship Programs – Better structured and maybe built outside of the colleges if they themselves cannot support the programs efficiently.
- Teach storytelling more than anything else to K-12 students. More reading, writing, and practicing the story telling structure and process.
- Business classes/workshops just on business management. Our industry also needs entrepreneurs but just like any other start-up, they need support with finances, taxes, start-up capital, etc.

Additional Thoughts, Insights, and Recommendations

- **Need more funding for art(s) organizations**
- Expansion leads to more jobs
- Don't lose talents to other markets/cities/festival circuits
- People want to stay but feel the need to find more, sustainable income
- Brand an education initiative that can put people on-set to learn our trade with us
- Do we have enough talent here?
- **What does the talent need to stay here? Why do they stay and why do they go?**
- Help talent promote, market, and build their creative voices and portfolios
- **Networking VS Masterclass**, they are very different and needed to be treated differently
- Connect Business Community to Film/Video Community
- **Teach the next generations how to properly present, pitch, and value themselves in the industry and don't zero out our trade**
- **Talent database needs to be vetted and have credentials**
- **Invite distributors and producers to an industry night to meet and discuss projects**
- **What is the living wage for most of our market? How are people surviving?**
- **What defines sustainable income for most of the industry in Milwaukee? How does each person define this? Can this be built into a survey?**
- Develop more talent – Benchmark for skill sets that are needed for our trade

- **Not enough filmmakers work with producers or understand what a producer's involvement is.** Milwaukee Film will reach out directly to directors of our film and not the producers. For producers to stay in Milwaukee they must be utilized and valued for their work.
- Foster "start-up" nights for new film/creatives to learn key business skills
- **Teach on-set etiquette and process**
- **Teach contracts and agreements** (SAG, insurance, payroll, etc.)
- **Teach more grant writing and value of writing** (not just directors, needs to be producers too)
- More mentors
- **More visiting filmmakers, distributors, and producers**
- Real world training – "Think on your feet!"
- **Focus groups for each topic (K-12, college, industry, etc.)**
- **Possible Partnerships**
    - Big Shoes Network (Job Postings for the Advertising Community)
    - Greater Together Program
    - MATC, Marquette, UWM, Concordia, Alverno, Cardinal Stritch, etc.

Professional Development – Priority Action #1: Bring Industry Professionals into More Schools

1. **Description of Proposed Strategic Action:**

   Bring Industry Professionals into more schools (K-12 and Colleges) to teach more about our industry, technology, and jobs

2. **Immediate Next Steps:**

   - Confirm all of the industry professionals in the area (membership sign up?)
   - Vet the professional's credentials so they are proven industry leads in terms of being able to teach their practice
   - Find which local colleges and K-12 teachers/programs would like visiting industry professionals (Define the demand and need)
   - Start a program to schedule the connection of professionals to the schools and the calendar can be online, so industry professionals can see when and where they can sign up. Educational programs can still plan their classes as need and make a "posting" for a industry professional to fill the request.

3. **Longer-Term Action Steps:**

   - Again, like most of the needs, someone will need to manage this program and help connect the dots. This person must be supported in this role and commitment and well connected to the industry professionals as well as the school programs.
   - Over time, this program would have potential to grow our local workforce and hopefully retain the talent and ideas fostered through this program. This program will have to focus on "you can create and live here and not have to move to work in this industry."
   - Build a support system for this program with educational funding or investors.

4. **Key Dependencies/Risks:**

   - Time commitment – From the person managing the program down to the schedules and flexibility of the teachers and industry professionals
   - Do we have a large enough workforce that can commit to this program and not get burned out? Make sure the program does not just hinge on 5 industry professionals doing all the work. A new and diverse mix of industry professionals must always be recruited for this program.
   - Make this work on industry professional's time as well. They have to work for a living like anyone else, so pay them to talk with the students for 1 hour or so, and they will therefore commit more regularly and stay involved.

5. **Other Stakeholders that should be involved:**

   - MPS and all area K-12 schools
   - UWM, Marquette, MATC and all area colleges
   - Possibly a program like "Greater Together" working to add diversity into the advertising community

Professional Development – Priority Action #2: Define the Demand for Our Industry

1. **Description of Proposed Strategic Action:**

   Since we already know the "supply side" of our industry, try to define the demand of our industry to the region or to the audience at large as whole. Try to define the potential.

2. **Immediate Next Steps:**

   - Confirm all of the industry professionals in the area (membership sign up?)
   - Vet the professional's credentials so they are proven industry leads in terms of being able to teach their practice
   - Survey industry professionals about their trade, the demands and potential of their field.
     - What is most asked of us to create? Films, web videos, TV spots, VR work, etc?
     - What do the industry professionals want to be creating more of? Films, TV spots, music videos, web series, TV series?
     - What talents do we have, what is our strong suite and what is our weakest abilities?
     - What do we need more talent in? (Example: Editors)

3. **Longer-Term Action Steps:**

   - Again, like most of the needs, someone will need to manage this survey and help connect the information. It would be beneficial if this person is actually an industry professional who works in the trade.
   - Overtime, this program would have potential to define what is the potential of our trade in this market and what could our industry grow in to.

4. **Key Dependencies/Risks:**

   - Time commitment – From the person managing the survey to the commitments of the industry professionals
   - Need creditable, significant, on-point questions for the survey. Questions should be written by industry professionals for industry professionals
   - Need a diverse mix of industry professionals involved

5. **Other Stakeholders that should be involved:**

   - All industry professionals in the region

Professional Development – Priority Action #3: Collaboration between film industry and educational partners

1. **Description of Proposed Strategic Action:**

   More Visiting Industry Professionals & More Local Professional Masterclasses & Workshops. More "workshops" for learning rather just "networking" events. People want to spend their time learning or getting something from the event, not just playing games.

2. **Immediate Next Steps:**

   - Confirm all of the industry professionals in the area (membership sign up?)
   - Vet the professional's credentials so they are proven industry leads in terms of being able to teach their practice
   - Determine what topics are needed for more "Professional Development Workshops & Masterclasses (e.g., editing, sound design, directing talent, documentary directing, etc.)
   - Ask local industry professionals to also recommend and connect with professionals from other markets to come to Milwaukee to speak and teach a class (e.g., David Lowery teaches a masterclass on "Directing for Fiction Film")
   - Start a schedule of events that could simply be quarterly, with mostly local industry professionals speaking (maybe even panels at the workshops for more people), and have 1 visiting industry professional a year

3. **Longer-Term Action Steps:**

   - Keep interest in the program by keeping the "creditability" of the professionals very high in quality.
   - Overtime build an interested audience and following based on professional growth and expanding our talent's capabilities in this market
   - Build a support system for this program with educational funding or investors.

4. **Key Dependencies/Risks:**

   - Time commitment – From the person managing the program down to the schedules and flexibility of the industry professionals
   - Keep interest in the program by keeping the "creditability" of the professionals very high in quality. Make sure all people are vetted for their quality of work and expertise in the trade.
   - Do we have a large enough workforce that can commit to this program and not get burned out? Make sure the program does not just hinge on 5 industry professionals doing all the work. A new and diverse mix of industry professionals must always be recruited for this program.

5. **Other Stakeholders that should be involved:**

   - UWM, Marquette, MATC and all area colleges – promote these events to the schools for their students to learn more professional development, etc.
   - Milwaukee Film (They do not have to run this program year round anymore, but can partner for the festival filmmaker events)

Breakout Group Summary: Local Networking

Key Assets and Challenges

Key Assets of the Region

- Strong collaborative culture (but there needs to be more ways to connect people to foster more collaborations)
- Role models/mentors for young filmmakers (but not enough, there needs to be a better way to connect the two, forming a pipeline)
- Film Festival is a great asset to network, collaborate, and raise industry visibility.
- Strong networking opportunities with local alumni

Key Challenges in the Region:

- Lack of diversity within local film community
- No good database of local resources and locations
- Lack of community resources to showcase work
- Lack of a physical hub or co-work space to enable ongoing networking and collaboration

Strategic Goals

I. Stronger local networking opportunities and resources across the industry, connecting independent professionals, in-house creatives and more informal creatives.

II. Strengthen network relationships with minority filmmakers and creative professionals.

Top 3 Priority Actions

1. Networking events- informal/formal, all-industry/role-focused
2. Physical Space/Hub
3. Internships/mentorship

Other Promising Actions

- Connect to education/workforce for diversity pipeline development
- Local versions of online communities

Local Networking – Priority Action #1: Networking Events

1. **Description of Proposed Strategic Action**:

   Formal and informal events, some broad and all-industry, others focused by role/area. Frequent, consistent and valuable.

2. **Immediate Next Steps**:

   - Establish a group to plan (diverse leadership, broad focus)
   - Plan events with clear focus/purpose
   - Identify multi-year plan for event growth

3. **Longer-Term Action Steps**:

   - Awards/Recognition events- they demonstrate talent, and can focus beyond the filmmaker, such as awards for acting, sound, etc.
   - Organized year-round screenings, and more unified support and promotion of local screenings

4. **Key Dependencies/Risks**:

   - Funding as a risk, as this will need money to be successful
   - Time investment
   - Ability to determine ROI on events to maximize efforts

5. **Other Stakeholders that should be involved**:

   - Audience 14k
   - MARN (Milwaukee Artist Resource Network)
   - Greater Together

Local Networking – Priority Action #2: Physical Space/Hub

1. **Description of Proposed Strategic Action:**

   A physical space to bring talent together, an incubator.

2. **Immediate Next Steps:**

   - Define needed assets for space (space needs)
   - Find an establishment interested in partnership
   - Plan networking events and uses of space

3. **Longer-Term Action Steps:**

   - Launch space
   - Focused happy hours
   - Host networking events
   - Masterclasses
   - WiP Screenings

4. **Key Dependencies/Risks:**

   - Launch funding
   - Business sustainability
   - Location access (broad attraction of different communities)
   - Legal stuff

5. **Other Stakeholders that should be involved:**

   - Local & state government
   - Investors
   - Audience

Local Networking – Priority Action #3: Internships/Mentorships

1. **Description of Proposed Strategic Action:**

   Internships and mentorships to develop skilled talent within the city/region.

2. **Immediate Next Steps:**

   - Identify sites, participants and administration
   - Determine structure for internships and structure for mentorships
   - Develop application process for candidates and sites

3. **Longer-Term Action Steps:**

   - Identify pathway for hiring (internships>jobs>higher pay)
   - Design additional structure for peer-to-peer mentorship to drive new collaborations

4. **Key Dependencies/Risks:**

   - Lack of interest
   - Lack of participants on either side
   - Department of Labor issues
   - Capacity of admin and funding

5. **Other Stakeholders that should be involved:**

   - Local established professionals
   - Students
   - Funders to offset costs

Breakout Group Summary: External Networking

Note: *This breakout group adopted a slightly different approach than other tables. They began by defining three Strategic Goals, then developed 3-4 Priority Actions for each goal, and finally developed additional details for each of those actions. As a result, this summary is structured to reflect these different outputs of the group discussion.*

Key Assets and Challenges

Key Assets of the Region:

- Strong collaborative culture

Key Challenges in the Region:

- Distance from national film hubs
- Weak relationships with Madison and Chicago networks
- No good database of local resources and locations

Strategic Goals & Priority Actions

I. Turn Milwaukee into a co-production / buyer's market.

- Establish a digital presence for Milwaukee's Film Community. Website should serve as a branded, online hub for both interested local parties and outside investors to use.
- Increase in-person project engagement
- Make Milwaukee Film a year-round hub to show outsiders all that we as a community do

II. Bring streaming services, cable networks, distributors, and potential producer/investor connections to Milwaukee for networking.

- Invite every major funder network, streaming service, cable network, digital platform, news network, and both national and international distributors to Milwaukee Film Festival or physical hub location (if/when established)
- Schedule Master Classes/workshops with all of them.
- Utilize critical, nationally recognized assets to attract goal targets

III. Develop deeper ties to New York, Los Angeles, and international locations.

- Create deep and deliberate partnerships with NY and LA-based organizations
- Designate Milwaukee ambassadors on the coasts and abroad who will increase visibility and awareness of our MKE filmmaking community
- Send delegations to NY & LA for industry trips
- Establish a cultural agent in city government or hire a private agency for representation within government

External Networking – Strategic Goal #1: Co-Production/Buyer's Market

1. **Description of Proposed Strategic Action:**

   Turn Milwaukee into a co-production / buyer's market.

2. **Action Steps & Details**

   A. **Establish a digital presence for Milwaukee's Film Community.** Website should serve as a branded, online hub for both interested local parties and outside investors to use. Site should:
   - reflect all the talent and resources available in the Milwaukee area
   - include a reel showcasing the city's talent pool, private message boards for collaboration and inquiry
   - Include testimonials from orgs who've worked with local film community members or companies, outside film crews who've worked in/with Milwaukee, etc.
   - have a social media presence—Facebook, Twitter, Instagram
   - potentially feature private message boards (note: I'm assuming this is for collaboration and/or potential financing conversation)
   - include/serve as a sounding board to elevate—pitches, projects, Why MKE?

   B. **Increase in-person project engagement**
   - Open applications, select less than 20 projects, and focus on set criteria
   - Support a regional talent contest which attracts professionals in various arenas (editing, post-production)
   - Host a co-production market during the Milwaukee Film Festival

   C. **Make Milwaukee Film a year-round hub to show outsiders all that we as a community do**
   - *No details developed during workshop.*

External Networking – Strategic Goal #2: Invite People to Milwaukee for Networking

1. Description of Proposed Strategic Action:

- Bring streaming services, cable networks, distributors, and potential producer/investor connections to Milwaukee for networking.

2. Action Steps & Details

A. Invite every major funder network, streaming service, cable network, digital platform, news network, and both national *and* international distributors to Milwaukee Film Festival or physical hub location (if/when established).

B. Schedule Master Classes/workshops with all of them.

- Have Milwaukee Film schedule more Master Classes with film festival alumni
- Focus on networking and distribution
- Set up a suitcase fund for filmmakers to visit studios/investors/etc. on the coasts
- More workshops with established DPs, directors, writers, etc.
- Workshops/labs/hackathons with national orgs and commissioning businesses (A&E, POV, NY Times)
- Teach Milwaukee filmmakers how to market themselves beyond the local area. Focus on market analysis, self-promotion, and business organization.

C. Utilize critical, nationally recognized assets to attract goal targets

- Water: tons of potential content around this topic. Own it!
- Summerfest

Strategic Goal #3 – Strengthen ties to NY, LA, and Beyond

1. **Description of Proposed Strategic Action:**

- Develop deeper ties to New York, Los Angeles, and international locations.

2. **Action Steps & Details**

A. Create deep and deliberate partnerships with NY & LA-based organizations.

- Build relationships with national and international companies who have hubs in NY or LA
- Connect with international neighbors to jointly promote festivals
- Very intentional networking with national groups that promote & develop women filmmakers and filmmakers of color
- Invite IDA, Women In Filmmaking, etc. to hold their meetings in MKE

B. Designate Milwaukee ambassadors on the coasts and abroad who will increase visibility and awareness of our MKE filmmaking community.

C. Send delegations to NY and LA for industry trips.

- Subsidized trips to the coasts for meetings, networking, commerce, development
- Funding to help MKE talent get to NY and LA to pitch projects

D. Establish a cultural agent in city government or hire a private agency for representation within government.

- Promote Wisconsin's diverse climates and seasons as a production asset
- Network with other states' film commissions
- Create an internship/exchange program, where we "import" talent from outside region and "export" MKE talent to NY or LA to learn

Breakout Group Summary: Organizational Infrastructure

Key Assets and Challenges

Key Assets of the Region:

- Several existing organizations related to film/arts that could be better leveraged

Key Challenges in the Region:

- No dynamic statewide film office to help identify locations, facilitate permitting, etc.
- Several past attempts to create a State Film Commission have failed
- Film Wisconsin is not well-connected to Greater Milwaukee activities
- Lack of awareness/publicity of Milwaukee's film-related assets (e.g., shooting locations, production companies, crew, etc.)
- Lack unifying vision/strategy to build a coalition and mobilize support
- Lacking organizational capacity to help coordinate and track progress on strategic industry initiatives

Strategic Goals

I. Define and develop Leadership
II. Secure sustainable funding
III. Establish physical and virtual collaborative spaces

Top 3 Priority Actions

1. Establish creative virtual space and physical spaces
2. Determine identify and leadership
3. Secure sustainable funding

Other Promising Actions

- Compile best practices from other organizations
- Prioritize distribution of money
- Membership growth/dues

Organizational Infrastructure – Priority Action #1: Establish Virtual and Physical Creative Spaces

1. **Description of Proposed Strategic Action:**

   Establish a creative virtual space (e.g., website, database, resource network) and physical space (e.g., a "clubhouse") as identifiable communal gathering places / work spaces within the community.

2. **Immediate Next Steps (VIRTUAL SPACE):**

   - Determining the best information to share – contacts, event calendar, opportunities, film industry info, newsfeed, tips, job postings, etc.
   - Find web designer and IT support
   - Determine structure - website map

   Immediate Next Steps (PHYSICAL SPACE):

   - Donated space
   - Find location on bus line/free parking
   - Work space with screening room, communal space, equipment share
   - Space rental for members

3. **Longer-Term Action Steps (VIRTUAL SPACE):**

   - Marketing/awareness of website/network
   - Community partners
   - National outreach

   Longer-Term Action Steps (PHYSICAL SPACE):

   - Marketing/awareness of location
   - Community partners
   - Membership dues to contribute towards functionality and sustainability of work space
   - Implement mentor programs

4. **Key Dependencies/Risks (VIRTUAL & PHYSICAL SPACE):**

   - Servers
   - Web designer consistency
   - IT support ongoing
   - Growth of members = need for larger space

5. **Other Stakeholders that should be involved (VIRTUAL & PHYSICAL SPACE):**

   - IT Firm
   - Partnership with Educational Institutions
   - Commercial real estate partnerships

Organizational Infrastructure – Priority Action #2: Determine Identity and Leadership

1. Description of Proposed Strategic Action:

Determine identify and leadership (define an identity, clarify the purpose of the organization, and identify a leader).

2. Immediate Next Steps:

- Establish main leadership committee with one representative from smaller committees/action groups: Education/Workforce, Marketing -Internal/External, Funding, Government
- Committee to identify a leader/manager for the organization
- Committee to produce a vision and determine strategic industry initiatives
- Secure $$$ for leader
- Leader to meet with the community to determine its needs
- Leader to communicate these needs on local, state and national levels Identify value to obtain members
- John Ridley - as a face of the organization.
- Groups other than just Milwaukee Film step forward

3. Longer-Term Action Steps:

- Grow membership, staff and volunteers
- Membership dues
- Grow network beyond Milwaukee
- Expand/diversify leadership
- Education & mentoring

4. Key Dependencies/Risks:

- Strong personality and presence within the community and beyond

5. Other Stakeholders that should be involved:

- Membership ambassadors
- Community partners, businesses, schools

Organizational Infrastructure – Priority Action #3: Secure Sustainable Funding

1. **Description of Proposed Strategic Action:**

   Secure financial sustainability (maintain funding)

2. **Immediate Next Steps:**

   - Create 501(c)3
   - Identify case model for sustainability
   - Create a case statement for development
   - Establish membership, determine dues
   - Create awareness, get ideas in front of the right people/funders
   - Interfacing with other communities
   - Financial leadership & staffing
   - Fiscal sponsorship
   - Roadmap/resource of grants & funding opportunities
   - Figure out budget, forecast estimation
   - Donations

3. **Longer-Term Action Steps:**

   - Grow membership & investors
   - Create endowment
   - Look for funding sources outside of Milwaukee
   - Ability to connect funds to projects

4. **Key Dependencies/Risks:**

   - Diversify investors: individual, grants, corporate, WEDC
   - Tax incentive

5. **Other Stakeholders that should be involved:**

   - Milwaukee Film

Appendix E: Photos from Action Planning Workshop

Photos courtesy of Dick Blau and Jubran Kanaan.