

## Executive Summary for the Future of Keller Auditorium Collaborative Process

### Kearns & West Background

Kearns & West is a national leader in collaboration, facilitation, public involvement, and strategic communications. We specialize in working with local, state, and federal agencies on multi-party processes within complex regulatory frameworks and equitable engagement needs. Through our expertise in collaborative decision-making, we have helped dozens of public and private sector clients find solutions to difficult issues.

Kearns & West provides third-party, neutral facilitation services by maintaining the focus and progress of group discussions, developing meeting ground rules, employing tested participation techniques that work toward building consensus, and collecting input from all participants.

Ben Duncan is a Vice President at Kearns & West who facilitated this process. He has extensive expertise in executive leadership and facilitation. Ben specializes in developing effective and inclusive processes in complex political and organizational environments and partnering with all levels of organizations, from executive leadership to front-line employees and communities, to develop collaborative solutions. His background includes almost two decades in local government, including serving as the Chief Diversity and Equity Officer for Multnomah County, a founding appointment and past Chair of the Oregon Environmental Justice Task Force and a Senate-confirmed seat on the Oregon Commission on Black Affairs.

Ben was the project manager for the Kearns & West team, responsible for tracking and overseeing process facilitation, planning and materials development, quality control, client reporting and final authority for the work. Ben attended weekly project team meetings with City staff and provided strategic process design as needed.

### Process Overview

#### Charge and Goals of the Future of the Keller Process

Prior to this process, the Halprin Landscape Conservancy and Portland State University had separately proposed plans to revitalize performing arts in southern Downtown centered around a Broadway-capable venue.

At its August 14, 2024 meeting, The Portland City Council charged the City, Halprin Landscape Conservancy, and Portland State University with collaborating to develop an alternative proposal that would allow a renovated Keller Auditorium and a new state-of-the-art performance center on PSU's campus to co-exist. The City shared three requirements the alternative proposal must include:

- A Broadway-capable venue
- Keller Auditorium site will remain a City asset and must be part of an alternative proposal
- Any possible stoppage in Broadway performances caused by construction at Keller Auditorium must be avoided

Representatives from the three parties met bi-weekly over a month-long period to create a proposal for the future of Keller Auditorium and a PSU performing arts center.

## Group Agreements

At the beginning of the process, the three parties agreed to operating principles to establish and maintain a culture of collaboration and trust, including those listed below.

### Engagement Agreements during Meetings

- Listen to understand, not to respond.
- Assume good intentions but attend to impact.
- Be willing to make mistakes and be forgiving of those who do.
- Allow for, and appreciate, disagreement of opinions, ideas, methods – respectfully.
- Personal stories stay; lessons can be shared.
- We are visionary and we will be bold.
- We prioritize the value to the public good – our love of the arts, the importance of Downtown and the future of Portland.
- We come to be part of a team.
- We will be aggressively curious about each other’s ideas – with the intent to expand and/or improve.
- We make time for joy.

### Engagement between Meetings

- This team’s work is to seek a shared vision - coordination and planning related to the existing proposals will be separate workflows.
- Discussions about potential concepts outside of these meetings need group consensus.
- Media inquiries about the process will be directed to the City of Portland.
- If there is homework between meetings, we commit to coming prepared.

## Participants

The following people were involved in the collaboration process (listed alphabetically by last name):

- **Halprin Landscape Conservancy:** Scott Andrews, Bob Naito, John Russell, Karen Whitman
- **Portland State University:** Dr. Leroy Bynum, Jr., Ann Cudd, Don Forsythe, Jason Franklin, Eric Noll, Maria Moran, Sarah Schwarz
- **City of Portland:** Lauren Broudy, Andrew Fitzpatrick, Andria Jacob, Bobby Lee, Karl Lisle, Chariti Montez, Donnie Oliveira, Magan Reed, Sonia Schmanski
- **Venues and Resident Arts Organizations:** Sue Dixon (Portland Opera), Anne Francis (Broadway Across America), Siri Grubb (Oregon Symphony), Karen Hill (Oregon Children’s Theatre), Rich Jaffe (Broadway Across America), Shane Jewell (Oregon Ballet Theatre), Anna Labykina (Portland Opera), Rachael Lembo (Metro), Nancy Strening (Metro), Craig Stroud (Metro), Isaac Thompson (Oregon Symphony), Tracy Wenckus (Portland Opera), Brian Wilson (Metro)
- **Subject Matter Experts:** Bill Blake (AMS Planning & Research), Anna Taylor (ART Public Affairs)
- **Kearns & West:** Colin Baker, Ariella Dahlin, Ben Duncan, Ellen Palmquist

## Overview of Group Meetings

From late August to late September, the group met on nine occasions for two hours each. Please see below for the date and objectives of each meeting.

Meeting Date	Meeting Objectives
August 22	<ul style="list-style-type: none"> <li>• Process launch</li> <li>• Establish rules of engagement and meeting cadence, schedule, and possible topics</li> <li>• Discuss other potential perspectives to incorporate into the process</li> </ul>
August 27	<ul style="list-style-type: none"> <li>• Defining a revitalized downtown/South Downtown and Keller’s role in an arts and culture economy</li> <li>• Envisioning Place: what does a successful and revitalized downtown look and feel like?</li> <li>• Agenda development and next steps for the group</li> </ul>
August 29	<ul style="list-style-type: none"> <li>• Affirm group agreements and guiding assumptions</li> <li>• Outline problems to be solved</li> <li>• Brainstorm “big ideas” to move from current to future state</li> </ul>
September 3	<ul style="list-style-type: none"> <li>• Conduct SWOT analysis on a draft proposal</li> <li>• Apply proposal concepts to SWOT analysis</li> </ul>
September 5	<ul style="list-style-type: none"> <li>• Conduct SWOT analysis on second proposal</li> <li>• Assess agreement and hear concerns/modifications to advance concept</li> </ul>
September 9	<ul style="list-style-type: none"> <li>• Complete SWOT analysis on second proposal from previous meeting</li> <li>• Share alternative vision from PSU</li> <li>• Clarify assumptions/limitations and existing/needed data</li> <li>• Assess agreement and hear concerns/modifications to concept</li> <li>• Come to modified consensus around a specific concept</li> </ul>
September 17	<ul style="list-style-type: none"> <li>• Provide clarity for guiding questions</li> <li>• Conduct initial assessments in subcommittee breakouts</li> <li>• Full group report out</li> </ul>
September 23	<ul style="list-style-type: none"> <li>• Follow up and input from venues/arts organizations and SMEs on subcommittee questions</li> <li>• Full group report out</li> <li>• Discussion of outline and approach for City Council presentation</li> </ul>
September 25	<ul style="list-style-type: none"> <li>• Summary of current place in the process</li> <li>• Subcommittee breakouts to incorporate input from venues/arts organizations and SMEs</li> <li>• Full group report out</li> </ul>

## Key Takeaways and Acknowledgements

### Key Takeaways

The group deliberated over several proposals during the first five meetings, and coalesced around a concept that includes the following core elements:

- A City-owned venue at PSU capable of Broadway shows and optimized for Ballet, Opera, and Symphony, to be built first and host Broadway performances during renovation of Keller Auditorium

- Keller Auditorium would remain a City-owned, Broadway-capable theater with public amenities, to remain open until the City-owned venue at PSU opens
- Additional PSU-owned smaller performing arts venue(s) for PSU and community performances, educational uses, spaces for resident arts organization
- A possible privately financed and run hotel, conference center
- Public amenities on both ends of the Halprin Sequence

The group agreed to form subcommittees to answer open questions and address information gaps with the agreed-upon alternative concept. The subcommittees and their respective fundamental questions included:

- **Financing:** What would a collaborative finance strategy look like to ensure funding for two venues that includes local, state and private funds?
- **Sequencing:** What is the timeline and what would have to happen in sequential order to meet the criteria we have?
- **Market Feasibility** What are the key questions that would need to be answered to inform the market demand and feasibility of two Broadway-capable venues?
- **Climate:** How would the projects meet City climate policies and goals?

The subcommittees met over the next three meetings and brought in subject matter experts to inform their approach. See below for a high-level summary of their key findings and recommendations. Further detail is provided in subcommittee reports. Note: subcommittees operated with the assumption of full funding for both the PSU and Keller venues.

- **Financing**
  - Potential sources and uses of funds and identification of key funding milestones critical to moving the project forward were developed.
  - Both projects should avoid competing for the same sources of funds, even if some would support both venues.
  - Seek opportunities for funding to be leveraged.
  - Philanthropic and corporate funding should be coordinated
  - The feasibility study, construction sequencing, and financing timelines should be connected.
- **Sequencing**
  - Pre-construction, concept design, community engagement, and traffic studies for both PSU and Keller should occur simultaneously.
  - The City and PSU should enter into an agreement early in process to confirm partnership
  - Construction of PSU's hotel would ideally occur at the same time as the venue; however, it could be separated from the venue if necessary.
  - When PSU completes its facility and is ready to host Broadway, construction will begin at Keller without interruption.
- **Market Demand**
  - A comprehensive feasibility study is needed to inform operations, use, and capacity of the two venues. Issues this study could explore include:
    - Total demand for the city, including smaller venues, rejection lists from P5, and arts ecosystem needs (e.g., rehearsal space)
    - Past and projected attendance numbers
    - Subsidies for commercial and nonprofit performing acts

- Additional information from arts organizations and funders to be considered, including business and growth plans, barriers to growth, Portland's ability to attract and retain new artists, and how funders consider growth.
- **Climate**
  - PSU and Keller are committed to climate friendly construction and renovation.
  - Climate considerations outside of construction include operations, passive cooling and heating, food waste, and no-idle and zero-emission loading/unloading zones.

At the final meeting, the Financing and Sequencing subcommittees met together and agreed on the sequencing of construction and the need to create a visual to show the relationship between construction and financing.

### Acknowledgements

The Kearns & West team is grateful for the opportunity to have facilitated this process and appreciates the good-faith effort demonstrated by the teams representing the Halprin Landscape Conservancy and Portland State University to “think big.” We recognize the incredible amount of time and effort that each team had previously invested in their respective proposals to envision future-state performing arts spaces that would serve our city. This process was successful thanks to each team’s willingness to collaborate, imagine something different, and seek a shared vision for what could be possible. We also appreciate the work of the City staff team that worked tirelessly in a short period of time to support the project, including Donnie Oliviera, Lauren Broudy, Karl Lisle, Magan Reed and Chariti Montez.

