



RESEARCH REPORT

Measuring Creative Placemaking

**Measuring Livability in the Station North Arts & Entertainment District,
Baltimore**

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Abstract

The aim of this project is to assist arts and cultural organizations better understand how local data can augment national data such as the U.S. Census in demonstrating the effects of their creative placemaking efforts. To do so it investigates two related sets of questions.

The first set involves how indicators can measure the effects of creative placemaking efforts on livability. To answer these questions, we take as a case study Baltimore's Station North Arts and Entertainment (A&E) District, which provides tax breaks and other incentives designed to encourage artistic activity within its boundaries. The second set involves how locally-compiled data can supplement local-level data from national sources (such as the U.S. Census) in studies aiming to demonstrate the effects of creative placemaking efforts on community livability.

The study uses a pre-post research design to examine the impact of the Station North district on livability in the immediate neighborhood: using 2002 as a baseline, as that was the year the Station North District was formed, it compares data from prior to 2002 to more recent data for Station North and comparison neighborhoods in Baltimore, selected to be otherwise similar to Station North. The goal of this design is to uncover what neighborhood-level changes could be attributable to the A&E designation.

In regards to the first set of questions related to Station North in particular, data show increased arts-based employment in the area, a more active home purchase market, and an increase in rehabilitation permits. Other measures of livability have not changed as much: violent and property crime, unemployment, and vacant and abandoned buildings remain significant issues. As to the second set of questions, we find that local data are useful in complementing national data, even when they do not necessarily overlap directly.

Executive Summary

Efforts to understand creative placemaking initiatives have in recent years led to a significant amount of work on how data can be used to measure their effects. A major initiative has been work by the National Endowment for the Arts (NEA) to develop a set of arts-and-livability indicators intended to help practitioners measure and better understand the relationships between creative placemaking and four broad domains of livability: residential attachment to community, quality of life, arts and cultural activity, and economic conditions. As a part of this work, the NEA commissioned the Urban Institute to undertake a validation study of those indicators. In the course of that study, the research team received extensive feedback from NEA Our Town grantee representatives about measuring and collecting data: especially in terms of how to collect data useful for small geographies.

This project uses a case study framework to understand two questions: first to measure the effects on livability of a particular creative placemaking effort; second to investigate how nationally available local data (such as from the U.S. Census) compares to the locally-produced data increasingly available and accessible to practitioners. For its case, this project takes the Station North Arts and Entertainment District in Baltimore, Maryland, which was, in 2002, the first such district designated in the State of Maryland. Using a pre-post analysis of data from prior to the designation year and after the designation year, we analyze a range of livability indicators using data from both national and local sources, and compare the Station North neighborhood to other similar ones in Baltimore. In addition to this analysis, we did interviews with local stakeholders to account for other factors potentially affecting livability in these areas over time.

This project attempts to answer four main sets of research questions:

- Do data sources show that arts and cultural activities in Station North have had an impact on livability in the area? If so, what impacts may be associated with the arts and cultural activity?
- Do indicator data derived from local sources show similar patterns to those derived from national sources (e.g., similar direction of change in values) for the same area?
- Are differences between local and national data sources attributable to particular categories of indicators?
- What do arts and cultural organizations and other local stakeholders need to know to most effectively use local data to augment nationally available data in their creative placemaking efforts?

In terms of the first set of questions, we found mixed results: some outcomes improved in Station North when compared to the city of Baltimore as a whole or to the comparison neighborhoods, but others did not. Data indicate increasing economic development in Station North potentially related to the district designation: rehabilitation permits and home sales have increased notably in the past decade, and arts-related employment and businesses are significant presences in the area. However, challenges remain: vacant and abandoned buildings are a large presence in the area, and crime and unemployment remain high. Also worth noting are indicators related to the potential stress facing residents: housing cost burden is increasing in the area, as incomes are not keeping up with housing costs. Other indicators need more context. The share of residents with college degrees has increased substantially over the past decade, and the income of homeowners in the area has risen to the extent where it is now higher than for the city as a whole. But the effect to which these changes have affected longer-term residents is unclear.

For the second set of questions, we found that locally produced data can be quite useful in helping people understand local change. Outside of being particularly useful for measuring some categories, notably quality of life, local data can also be more easily compiled into geographies more exactly matching local communities of interest. However, those using these data need to be especially careful when using them, as they provide a number of issues complicating analysis. Here, we had some issues stemming from the nature of the research question itself: taking a pre-intervention year of 2000 meant that many locally-produced data sources were unavailable during the earlier time period.

Finally, this project illustrates the importance of understanding context when conducting quantitative analysis: linking neighborhood change to a particular initiative like the Arts & Entertainment District is exceptionally difficult given the host of other institutional, political, social, and economic forces active in a particular place at a particular time.

Introduction and Research Motivation

The role of arts and cultural activities in shaping communities has become especially prominent in recent years (Markusen and Gadwa 2010a), with at least some of the reason stemming from Richard Florida's theories on the influence of the creative class on economic Development (Florida 2002, 2005). To help frame this discussion, The National Endowment for the Arts (NEA) developed the concept of creative placemaking to represent the range of activities undertaken by public agencies and governments, the private sector, and nonprofit and community partners in a systematic way to encourage economic development, entrepreneurship, and increase local livability (Markusen and Gadwa 2010b).

A range of actors have worked to promote this work: NEA promotes Creative Placemaking (CP) with its flagship Our Town initiative and its predecessor, the Mayor's Institute on City Design 25th Anniversary initiative (MICD25). Similarly, ArtPlace America, a collaboration of foundations and funders, has awarded dozens of grants to support local creative placemaking efforts to drive vibrancy and diversity.¹ States also have encouraged use of arts and culture in promoting economic growth and revitalization, such as through creation of cultural district policies and tax incentives (Sparks and Waits 2012).

As a part of these efforts, funders, researchers and community-based initiatives have become interested in how to effectively show the effects of arts and culture or creative placemaking efforts (Jackson 2006, Jackson and Herranz 2002), even though the linkage between creative placemaking efforts and observed changes in indicator values is often unclear (Moss 2012, Markusen 2013).

As a part of its role promoting creative placemaking, especially through its Our Town initiative, the NEA hypothesized that successful creative placemaking initiatives may have positive effects community livability dimensions including resident attachment to communities, quality of life, local economic conditions, and arts and cultural activity. In order to assist communities understand the effects and value of creative placemaking efforts, the NEA initiated the Validating Arts and Livability Indicators (VALI) project to validate candidate indicators in these dimensions.

¹ About ArtPlace America. <http://www.artplaceamerica.org/about/>. Accessed October 30, 2015.

The Urban Institute produced the VALI study, working with individuals associated with Our Town projects in selected communities. The project involved site visits to six Our Town sites, a one-day convening with four Our Town sites, and a focus group of other experts. The Validating Arts and Livability Indicators (VALI) Study: Results and Recommendations report was released in 2014 (Morley et al 2014). Its analysis indicated that while respondents considered most candidate indicators as appropriate for measuring livability dimensions, questions were raised about the usefulness of indicator data only available at geographic levels (whether census tracts, zip codes, or counties) often more expansive than actual creative placemaking project areas.

Given this reality, the potential role of local data in evaluating these efforts becomes salient. Local data are potentially available at geographic areas aligned to project boundaries and may be more current than national data available at a given time. As such, they hold promise for documenting the value of the arts and engaging local communities in research that helps demonstrate the value of the arts in community development.

This report is an effort to investigate two related sets of questions arising from the VALI study. The first set involves how indicators can measure the effects of creative placemaking efforts on livability. To answer these questions, we take as a case study Baltimore's Station North Arts and Entertainment District, which provides tax breaks and other incentives designed to encourage artistic activity within its boundaries. The second set involves how locally-compiled data can supplement local-level data from national sources (such as the U.S. Census) in studies attempting to demonstrate the effects of creative placemaking efforts on community livability.

Lacking the conditions for a randomized control trial, we implemented a pre-post research design to examine the impact of the Station North district on livability in the immediate neighborhood. The method makes pre-and post-intervention comparisons of target neighborhood outcome indicators of interest. The post-intervention measures are adjusted for external factors that affect the outcome indicator in the larger area (for example, the city), including communities not subject to the intervention.

Hypothesis 1: The Station North arts and culture district has had a positive impact on community attachment, quality of life, creative activity, and/or economic activity in the surrounding area.

Hypothesis 2: Used in combination with NEA national indicators, local indicators will provide a deeper understanding of the community effects of arts-related projects in the context of broader socio-demographic and economic trends.

Our research questions are:

- Do local data and/or local data derived from national sources show that the arts and cultural activities in Station North have had an impact on livability in the area? If so, what impacts are associated with the arts and cultural activity?
- Do indicator data derived from local sources show similar patterns to those derived from national sources (e.g., similar direction of change in values) for the same area?
- Are variations in patterns between indicator data from local and national sources primarily associated with particular categories of indicators (e.g., quality of life, economic conditions, arts and culture, community attachment)?
- How arts and cultural organizations and other local stakeholders engaged in community development using creative placemaking most effectively use local data to augment nationally available data in their efforts to show the effects of their activities?

Background

Station North

Located in central Baltimore, Station North spans the Charles North, Greenmount West, and Barclay neighborhoods, and is adjacent to Penn Station and the Maryland Institute College of Art (MICA). This proximity to large institutional actors and transportation has historically not helped the area: the Jones Falls Expressway, built in the 1950s and opened in 1962, cut the neighborhood off from other parts of the city, and the 1968 riots hit the area especially hard. Adding to the area's problems was the lack of a coherent identity: more the combined edges of three other neighborhoods than a 'place' in its own right.

FIGURE 1

Station North District Boundaries



Source: Station North Arts and Entertainment District website: <http://www.stationnorth.org/about/>

The area has been plagued by social and economic problems for decades. Unemployment has hovered over 20 percent and vacant units and property, especially in the area's eastern stretches, is a significant issue (Figure 2).

Despite these issues, the area has also attracted a number of businesses and initiatives linked to the arts. These include, in addition to the proximity of MICA, artist live/work spaces such as the Copy Cat Building and the Annex (Gross 2012) and businesses along Charles Street such as the Charles Theatre.

FIGURE 2

Vacant buildings and property, Station North (2015)

Notes: Station North District outline in blue; red dots are vacant buildings; red polygons are vacant properties.



Source: Data compiled from City of Baltimore

These assets coalesced into the area's designation, on July 1, 2002, as the first Arts & Entertainment (A&E) District in the State of Maryland. The district designation provided tax breaks and other incentives designed to encourage artistic activity in the area (discussed in more detail below). This designation, even outside of the benefits provided by the tax breaks, provided local activists and organizations something to organize around, and the Station North identity has taken off over the past decade. MICA has added to its local footprint, and in 2011 received an NEA Our Town Grant to use public art and programming to enhance the Station North district.²

² <https://www.arts.gov/national/our-town/grantee/2011/maryland-institute?id=034>

In 2015 MICA and Johns Hopkins started operating their joint master’s program in film operating out of the Centre Theatre building, and the Parkway Theatre at Charles Street and North Avenue is being renovated to house the Maryland Film Festival (Kaltenbach 2015).

Arts and Entertainment Districts

OVERVIEW

As of 2015, there are 24 A&E districts in Maryland, with two other in the city: The Bromo Tower and Highlandtown.³

Individuals and businesses located in Maryland State Arts & Entertainment Districts are eligible for tax incentives administered by the state’s Department of Business and Economic Development, and overseen by the state Comptroller’s Office. These include:

1. an income tax subtraction modification for qualifying artists living in the City of Baltimore and producing and selling work in the District,
2. a property tax incentive for renovating approved spaces in the district for artistic purposes, and
3. an admission and amusement tax exemption for certified arts and entertainment activities in the District.

Qualifying artists “may claim a subtraction for income derived from the sale, publication, production or performance of an artistic work within an arts and entertainment district, if the artist created that artistic work within that arts and entertainment district”.⁴

The program provides a 10-year tax credit on the property tax for buildings located in the District and being renovated at least in part for the use of a qualified artist or artistic and entertainment enterprise. It applies only to improvements made after July 1, 2002, and only to the portion used by qualifying artists or artistic enterprises. The tax credit is computed using a sliding scale based on the value of the improvement and whether the improvement is within a state-designated enterprise zone:

- improvements outside of state-designated enterprise zones receive credits based on 80 percent of the improvement for the first five years; after that point the share eligible decreases

³ <http://www.msac.org/programs/arts-entertainment-districts> Accessed November 15, 2015.

⁴ http://forms.marylandtaxes.com/11_forms/502AE.pdf

by 10 percentage points annually (e.g. to 70 percent, to 60 percent, etc.) until reaching 30 percent in year 10.

- Improvements within enterprise zones have a credit that increases over a ten year period: from 20 percent on the first five years, and then increasing to 70 percent for year ten.

Much of Station North is located in an enterprise zone, although the eastern sections closer to Green Mount Cemetery are not. ([description link](#); [legislative link](#)).

The Admission and Amusement Tax exemption is for ten years, and is a 100 percent tax exemption from admission and amusement tax on any gross receipts levied by a qualified artist or enterprise in the District ([description link](#)).

A&E DISTRICTS: ESTIMATING IMPACTS AND FUTURE PATHWAYS

Understanding the exact role A&E districts play in promoting economic development has been complicated by the range of other potential factors affecting neighborhood change. A 2014 economic impact study for the Maryland Arts Council attempted to quantify the effects of A&E districts in the state by conducting a fiscal and economic impact analysis using IMPLAN modeling. The authors estimated impacts using new commercial employment and event spending in the A&E districts, and assumed that new businesses were formed due to the designation. Overall, it found that the Station North A&E districts supported an estimated 366 jobs, \$32.5 million in state GDP and \$10.5 million in wages during Fiscal Year 2013 (Irani and Grimm 2014). Although the authors excluded economic activity due to pre-existing businesses, attributing the cause of new economic development strictly to the A&E district designation likely overstates the direct impact.

The actual effects of the A&E designation itself – especially in regards to the importance of tax incentives for encouraging new businesses or keeping existing ones has been debated. Several people interviewed thought the incentives themselves were minimally relevant. In some districts, incentives from other programs, such as Baltimore’s Historic Restoration and Rehabilitation Tax Credit, or the Low Income Housing Tax Credit (LIHTC) were thought to be more valuable and more heavily used (also see City of Baltimore 2015). Instead, interviewees focused on the usefulness of the district designation as a marketing and organizing device. This was especially salient in Station North, which, prior to its formal designation, had not been seen as a cohesive place. Interviewees also noted that serious organizing and economic development efforts in Station North began, not in 2002, but later in 2005-2006 as organizing efforts began to pay off.

In Baltimore, the three designated A&E Districts participated in a working group that generated 27 recommendations and action items to improve the program. Priorities included an annual meeting of District management, Boards, and the Mayor; collaborative marketing materials; clarification on existing tax incentives; and securing of operating support (City of Baltimore 2015). Tax incentives in particular were singled out for improvement, both in terms of increasing currently limited public awareness, and in terms of expanding incentive-eligible definitions.

These issues are relevant to the current study in that its treatment of 2002 as the “baseline” year for Station North is complicated by the fact that the designation and incentives themselves were not necessarily the root cause behind neighborhood change. This report will return to this issue in the concluding sections.

Research Design

Design

To design and conduct the quasi-experimental comparisons addressing the research questions, we:

1. prepared data from the Urban Institute’s data repository for the indicators constructed from nationally available data,
2. obtained and prepared local data on Station North and four comparable neighborhoods using data from the Baltimore Neighborhood Indicators Alliance-Jacob France Institute at the University of Baltimore (known as BNIA-JFI), a repository of local data,
3. conducted interviews with community stakeholders in Baltimore neighborhoods,
4. conducted the quantitative impact analysis using the nationally available and local data,
5. compared the results to determine how they align and to determine the advantages and disadvantages of each set of indicators.

Analysis of indicators constructed from local-level data available from national sources. Using annual data from 2000 through the most current data available for indicators of community attachment, quality of life, creative activity, and economic conditions, we compared pre-post changes in length of residence, vacancy rates, number of arts and culture nonprofit organizations, median household income, and home purchase amounts, among other outcomes, for Station North and the set of four

matched (comparable) neighborhoods. We are considering 2002 the “intervention year,” for it was during that year that Station North received the A&E designation.

Analysis of indicators constructed from local data. BNIA-JFI provided Urban access to data housed at BNIA-JFI for a selected set of livability indicators for the customized geography of the Station North district and for the four matched neighborhoods. The indicators cover the same four livability dimensions as the local-level data from national sources: community attachment, quality of life, creative activity, and economic conditions.

Interviews. To put the quantitative findings in context and to assist us in interpreting the changes in livability attributable to Station North, as suggested by the analysis, Urban Institute researchers conducted several interviews with community stakeholders in Station North and others knowledgeable about the comparison neighborhoods.

Geography

The geographic unit of analysis for the nationally available datasets (American Community Survey, County Business Patterns, etc.) is the census tract, the geographic area that most closely matches the boundaries of the Station North arts district for which data is available from these sources. The official boundaries of the Station North Arts and Entertainment District cover an area that falls within three census tracts, but the majority of the district and the arts-related activity are located within a single census tract (1205). Because the BNIA-JFI data is available at the address level, we were able to customize our geographic unit of analysis to the exact boundaries of the arts district, while also reporting on data for tract 1205, useful for comparative analysis.

Additionally, we selected four comparison neighborhoods within the city of Baltimore with the assistance BNIA-JFI. They used a cluster analysis to identify other neighborhoods similar to Station North based on the share of commercial properties, racial diversity index, and median household income, and unemployment rate. While Baltimore has two other Arts & Entertainment Districts (Bromo Seltzer, and Highlandtown), they did not match up with Station North in terms of these indicators, and they were not selected as comparison neighborhoods.

Data sources

We are using multiple sources of local-level, nationally available data, all of which are housed within the Urban Institute's data repository, and one source of local data, BNIA-JFI, which compiles data from numerous local sources. The original sources of the BNIA-JFI data include the Baltimore City Housing Department, Baltimore City Public Schools, and Baltimore City Police Department.

LOCAL-LEVEL DATA AVAILABLE NATIONALLY

Our analysis of local-level data from national datasets focuses on those available at the census tract level. While there are other relevant indicators with data available at the ZIP code level (notably County Business Patterns), their boundaries are such that they do not match up closely with Station North boundaries.

As we consider 2002 the intervention year, we are treating 2000 as the "pre-intervention" year and focusing on 2000 Decennial Census data. "Post-intervention" Census data come from the American Community Survey (ACS). The ACS is a Census Bureau survey that collects demographic, housing, social, and economic data annually, and has replaced the Decennial Census "long form" for most relevant variables. ACS data is available in one-, three-, and five-year estimates. Five-year estimates are the most useful for census-tract level analysis, since the extended time span allows surveyors to collect a sample large enough to provide estimates for smaller geographies. However, this also introduces an element of confusion into analysis: since the sample was collected over a five year period, it cannot be seen as a 'point in time' estimate. For this analysis we compiled and analyzed 2009-2013 ACS five-year estimates, which were released in December 2014.

Other census-tract level datasets include the National Center for Charitable Statistics (NCCS, housed at the Urban Institute), measuring the number of arts-related nonprofits, and Home Mortgage Disclosure Act (HMDA) data, measuring home lending activity.

LOCAL DATA

We worked with BNIA-JFI to provide a range of indicators available at the address or parcel level. These include indicators on business and the economy, crime, education, health, housing assistance, property transactions, public assistance, vital statistics, voting records, community assistance calls, and prisoner reentry. Most of these data sources go back to 2000, our pre-intervention year. However, some sources, notably school enrollment and property tax assessments, are only available back to 2003 or 2004, respectively. As these are relevant to our analysis, we will incorporate these indicators into our

analysis while addressing issues arising from these dates. Locally-available business data were only available back to 2008, and as such are not usable for the pre-post analysis.

Analysis

Introduction

As noted above, this project uses a “pre-post” research design to examine the effects of the Station North district on livability. This method analyzes indicators of interest prior to and after an intervention of interest, comparing the differences in a ‘treatment’ group receiving a particular intervention to a control group not receiving that intervention. While often structured around individuals or populations, this approach can also be extended to geographies by examining outcomes in a neighborhood receiving an intervention to other neighborhoods not receiving that intervention.

Of course, isolating whether a particular intervention is the root cause of different outcomes remains problematic, given a host of other possible causes could be responsible for a given change. One way to partially control for this is to select similar places in a particular city, which controls for more macro-economic social and economic changes that may be occurring regionally.

For this project, our “treatment” neighborhood of Station North was compared to four control tracts in Baltimore. This analysis, wherever possible, compared indicators as of a pre-intervention year (generally, 2000) to a post-intervention year (in general the 2009-2013 ACS range for National data, or 2011 data for locally-produced data).

BNIA-JFI selected control tracts based on an analysis of demographic and socioeconomic indicators in Baltimore Census tracts as of 2000. Their cluster analysis found “nearest neighbors” along three indicators: relatively high percent commercial, low median household income, and a low racial diversity index.⁵ By selecting only tracts that had 10 percent or more commercial, racial diversity scores of less

⁵ The racial diversity index refers to the percentage of times two randomly selected people would differ by race/ethnicity by squaring the percent for each group, summing the squares, and subtracting that sum from 1.0. This analysis used eight population groups: White, not Hispanic, Black or African American, American Indian and Alaska Native (AIAN), Asian, Native Hawaiian and Other Pacific Islander (NHOPI), Two or more races, not Hispanic, Some other race, not Hispanic, and Hispanic or Latino.

than 0.33, and median household income of less than \$20,000, seven potential comparison tracts remained. This analysis uses the four tracts most comparable to Station North as comparisons (Table 1).

TABLE 1

Station North and Control Census Tracts (2000)

Tract	2000 Population	Racial Diversity Index	Unemployment Rate	Percent Commercial	Median HH Income	Commercial Properties	Neighborhoods
1205	1,679	0.1621	0.245	21.8	\$15,335	190	Station North
604	2,226	0.2527	0.113	12.5	\$18,583	76	CARE, Washington Hill, Butcher's Hill
904	1,700	0.2704	0.2	10.1	\$14,718	59	Better Waverly
1701	1,680	0.3262	0.191	18.2	\$19,922	150	Seton Hill, Mount Vernon
1801	2,045	0.0536	0.243	14.3	\$9,313	105	Poppleton

Source: BNIA-JFI

The limited scope of this project means that the comparative analysis below does not attempt to detect causal chains or statistical significance: with only one “treatment” case (i.e. Station North), and a limited number of comparisons, analysis is by necessity descriptive in nature.

National Data

Background

A starting point for any measure of change is population. Table 2 presents Census data from 2000 and 2010.⁶ In the context of a city with slowly dropping population, that in Station North (tract 1205) grew

⁶ We do not compare Census 2000 population to American Community Survey (ACS) 2009-2013 estimates here, because the ACS estimates use a different population base to create estimates, and as such are not directly comparable.

from 1,668 in 2000 to 1,751 in 2010. While tract 1801 also saw an increase in population, population in the other tracts dropped.

TABLE 2

Population

	2000	2010	Percent Change
1205	1,668	1,751	5%
604	2,292	1,183	-48%
904	1,682	1,586	-6%
1701	1,690	1,602	-5%
1801	1,988	2,200	11%
Baltimore	651,154	620,961	-5%

Another measure of change involves the percent of population with a college degree (25 or older). Here Station North stands out: while the share in the city overall grew by approximately 40 percent, the share in Tract 1205 went from 2.7 percent in 2000 to 34.9 percent in 2009-13 (Table 3).

TABLE 3

Percent of Population 25 or Older with a College Degree

	2000	2009-13	Percent change
1205	2.7%	34.9%	1203.8%
604	19.5%	37.9%	94.0%
904	3.1%	9.4%	203.7%
1701	27.9%	35.2%	25.8%
1801	4.3%	2.3%	-47.2%
Baltimore	19.1%	26.8%	39.9%

Community Attachment

HOUSING UNITS AND OWNER OCCUPANCY

Table 4 shows that during the 2000s took place within a context where the overall number of housing units in Baltimore remained largely stable (dropping 1.4 percent), but the number of owner-occupied housing units was dropping more sharply (dropping 10.2 percent). Housing stock in tract 1205 took a different path: the overall number of units remained nearly identical, but the number of owner-

occupied units rose by over 50 percent: from 137 to 210. This meant that while the ownership rate in Station North remained below the city-wide average of 39 percent, it moved more closely in that direction: from 11 percent in 2000 to 17 percent in 2009-2013.

TABLE 4

Housing Units

	Housing units (total)		Owner Occupied Housing Units		% Owner Occupied Housing Units	
	2000	2009-2013	2000	2009-2013	2000	2009-2013
1205	1,211	1,207	137	210	11%	17%
604	1,362	710	238	140	17%	20%
904	868	845	200	227	23%	27%
1701	870	1,005	91	123	10%	12%
1801	938	1,033	83	79	9%	8%
Baltimore	300,477	296,256	129,879	116,673	43%	39%

CAPACITY FOR HOMEOWNERSHIP (SINGLE-UNIT STRUCTURES)

About a third of Station North’s housing stock (for both 2000 and 2009-2013) falls into the ‘single-family’ housing category, whether detached or attached (as is common in Baltimore rowhouse neighborhoods). To the extent that the capacity for homeownership is associated with this housing stock (ignoring ownership opportunities in larger buildings), Station North is in the middle of the study neighborhoods (Table 5).

TABLE 5

Single-Family Housing (Attached and Detached)

	2000	2009-2013	Percent Change
1205	384	434	13.0%
604	651	408	-37.3%
904	726	703	-3.2%
1701	219	297	35.6%
1801	426	684	60.6%
Baltimore	195,729	199,565	2.0%

OCCUPANCY/VACANCY RATE

While the housing vacancy rate as a whole in Baltimore increased during the 2000s: from 14 percent in 2000 to 18 percent in 2009-2013, the rate in Station North dropped from 37 percent to 24 percent

(Table 6). This still put the vacancy rate there higher than the city as a whole and higher than all of the comparison tracts.

TABLE 6

Vacancy Rate

	2000	2009-2013	Percent Change
1205	37%	24%	-33%
604	36%	15%	-59%
904	23%	20%	-12%
1701	7%	14%	88%
1801	12%	18%	51%
Baltimore	14%	18%	31%

Quality of life

Measuring quality of life using national datasets is difficult, especially for small geographies. Identified livability indicators such as the number of retail and service establishments, available through The U.S. Census’ County Business Patterns (CBP) series, are only available down to the zip code level. The Census and ACS can, however, detail some measures of financial stress linked to quality of life issues.

HOUSING COST BURDEN

One such issue is housing cost burden, an indicator measuring the percent of households spending 30 percent or 50 percent or more of their income on housing costs. This indicator is useful because it links an individual household’s income to housing costs directly. Table 7 shows this has been, and continues to be, a notable issue in Station North and the comparison tracts, all of which have larger shares of households spending 30 percent more of their incomes on rent than does the city of Baltimore as a whole. The 50 percent threshold, usually referred to as ‘severely cost burdened’ is also notable: as of the 2009-13 period, 36 percent of households in tract 1205 fell into this category, compared to 23 percent in the city overall. The rate of increase in tract 1205 was also larger than it was for the city as a whole, similar to that occurring in tract 604 and 1801 (by comparison, the change in severe cost burden was smaller in tracts 904 and 1701).

TABLE 7

Housing Cost Burden

	Percent of Households Spending over 30 Percent of Income on Housing			Percent of Households Spending over 50 Percent of Income on Housing		
	2000	2009-2013	Change	2000	2009-2013	Change
1205	46.0%	54.3%	18.3%	25.1%	35.0%	39.6%
604	43.5%	47.9%	10.2%	18.5%	25.7%	39.1%
904	49.3%	60.6%	22.7%	29.8%	32.3%	8.3%
1701	48.5%	57.4%	18.4%	28.7%	28.9%	0.7%
1801	41.5%	64.3%	55.0%	23.6%	34.6%	46.7%
Baltimore	35.1%	45.9%	30.9%	17.3%	22.8%	32.1%

Creative Activity

PERCENT EMPLOYED IN THE ARTS

While the percent of the population employed in the arts remained relatively constant in Baltimore between 2000 and 2009-13, it grew more substantially in two of the census tracts studied here (Table 8). 1205 saw the share go from 10.5 percent to 17.7 percent, while 1801 saw the share grow even more, from 11.3 percent to 27.7 percent. Arts-based employment dropped in tracts 604 and 904.

TABLE 8

Employment in the Arts

	2000	2009-13	Percent Change
1205	10.5%	17.7%	68.2%
604	14.5%	16.5%	13.7%
904	17.9%	17.5%	-2.6%
1701	7.0%	6.6%	-5.0%
1801	11.3%	27.7%	144.1%
Baltimore	8.3%	8.8%	6.7%

ARTS NONPROFITS

Using data from the National Center for Charitable Statistics (NCCS), we found relatively small numbers of arts-based nonprofit organizations based in the tracts under study (Table 9): of registered nonprofits, only two in 2000 and 7 in 2013; those actually filing 990s went from 1 to 2. So while 1205

did see an increase of one arts-related nonprofit during the period under study, most of these organizations remained concentrated in other parts of the city.

TABLE 9

Arts nonprofits

Tract	2000		2011	
	Registered	Filing 990	Registered	Filing 990
1205	1	0	2	0
604	0	0	0	0
904	0	0	0	0
1701	1	1	3	1
1801	0	0	2	1
Baltimore	107	47	156	80

Economic Conditions

HOME PURCHASE LOAN AMOUNTS (HOME MORTGAGE DISCLOSURE ACT DATA)

In the context of a city where significantly fewer home loans were made in 2011 compared to 2000, tract 1205 stuck out, both in terms of the trajectory and the average price. In 2000 6 home purchase loans were made in tract 1205 (combining FHA/VA and conventional loans), with an average loan amount of \$47,500, considerably lower than the City average (Table 10). By 2011, 11 loans were made, with average amounts of \$184,000: somewhat above the city average. Some comparison tracts (notably 604, 904, and 1701) followed city-wide trends with fewer loans made in 2011 than in 2000.

Between 2011 and 2013, the number of home purchase loans in Baltimore increased; of the tracts studied, 604, 1205, and 1701 went up, with the largest increase in 1205. Comparing 2000 to 2013 originations, 1205 sticks out: it had the second fewest in 2000, but the most (by a large margin) by 2013. In terms of average loan amount in 2013, only tract 604 had a value close to the city’s average of \$203,000.

TABLE 10

Home Purchase Loans

2000	2011	2013
------	------	------

	Number	Average	Number	Average	Number	Average
1205	6	\$ 47,500	11	\$ 184,000	22	\$ 160,091
604	23	\$ 71,870	5	\$ 160,800	9	\$ 194,333
904	13	\$ 41,538	2	\$ 40,500	1	\$ 40,000
1701	16	\$ 71,188	3	\$ 138,333	4	\$ 144,750
1801	2	\$ 41,500	2	\$ 64,000	0	NA
Baltimore	7,985	\$ 78,049	2,452	\$ 172,741	3,846	\$ 203,310

INCOME

The median household income for all tracts in this study was below that of Baltimore as a whole in both study periods, although the income growth in all tracts here outpaced that of the city as a whole. The rates of increase for 1205 and 904 were the two largest, respectively (Table 11).

Breaking out income by tenure allows us to see other trends: by 2009-13 homeowners in 1205 and 1701 had higher incomes than those in the city as a whole, while renter incomes remained lower than the city average for all census tracts.

TABLE 11

Income

Tract	Median Household Income		Median HH income (owner)		Median HH Income (renter)	
	2000	2009-13	2000	2009-13	2000	2009-13
1205	\$15,335	\$30,719	\$30,893	\$61,667	\$10,457	\$22,222
604	\$18,583	\$32,528	\$37,500	\$51,875	\$16,233	\$19,554
904	\$14,718	\$27,161	\$27,778	\$48,920	\$11,424	\$25,386
1701	\$19,922	\$29,527	\$33,750	\$69,904	\$18,333	\$25,956
1801	\$9,313	\$15,500	\$25,179	\$41,652	\$8,314	\$14,311
Baltimore	\$30,078	\$41,385	\$41,359	\$61,109	\$19,809	\$26,970

UNEMPLOYMENT RATE

Unemployment in Baltimore in 2009-13 was higher than it was in 2000, although rates dropped in the census tracts in this study (Table 12). Tract 1205 experienced a small drop between 2000 and the 2009-13 period, but the unemployment rate there (23.5 percent) remained the highest of tracts under study.

TABLE 12

Unemployment Rate

	2000	2009-13	Percent Change
1205	24.5%	23.5%	-3.9%
604	11.3%	10.8%	-3.8%
904	20.0%	10.3%	-48.2%
1701	19.1%	2.7%	-86.0%
1801	24.3%	17.1%	-29.9%
Baltimore	10.7%	13.9%	29.9%

Local Data

We do not have city-wide tallies for locally-compiled data, so the analysis in this section focuses comparing the study tracts with one another. However, we are able to analyze both tract 1205 and a district mapped to the exact boundaries of the Station North district. This in itself provides some interesting comparisons, which are detailed below.

Community Attachment

VOTING

Available data show a slight decline in registered voters in Station North/tract 1205 between 2002 and 2012 (Table 13); this was also the case in tracts 904 and 1801, although the share in tracts 604 and 1701 increased. As such, while voting registration may be a signal of community attachment, there is no obvious pattern or relationship in evidence here.

TABLE 13

Percentage of population 18+ registered to vote

	2002	2012
Station North	56.9%	53.2%
Tract 1205	53.2%	49.5%
Tract 604	58.0%	67.4%
Tract 904	66.5%	64.3%
Tract 1701	42.7%	47.7%
Tract 1801	62.0%	59.9%

SCHOOL ENROLLMENT

School enrollment data are only available from 2005, so are not usable as a true pre-post measure, but nonetheless may indicate some trends (Table 14; 2013 data were available and are also shown).

Notably, school attendance in the lower grades is dropping in Station North (and Tract 1205) while increasing somewhat for grades 9 through 12.

TABLE 14

Number of Students Ever Attending...

	1st to 5th grade			6th to 8th grade			9th to 12th grade		
	2005	2011	2013	2005	2011	2013	2005	2011	2013
Station North	135	91	87	64	38	46	67	67	76
Tract 1205	103	88	78	52	34	38	57	65	70
Tract 1801	243	211	222	151	116	113	142	153	148
Tract 904	142	115	126	99	48	61	105	91	93
Tract 604	92	76	54	95	45	37	81	50	40
Tract 1701	42	55	86	42	35	34	49	50	56

Quality of Life

311 CALLS

For calls relating to dirty streets and alleys, the rate of calls in all tracts increased substantially between 2002 and 2011 (2013 included here), although the increase was the largest in tract 1205 and the Station North District itself (Table 15). Calls regarding clogged storm drains also increased, but at lower rates. Here, Station North and tract 1205 had the highest rates in all three years.

Call rates could be due to a number of factors: while the actual number of incidents could of course be one root cause, so could other factors: residents at one point in time could be more likely to call 311 to report a complaint than at another point in time: interview respondents in Station North noted that local community groups were in fact promoting the use of 311 for complaints.

TABLE 15

Quality of Life Calls

	Dirty Streets and Alleys: 1,000 population			Clogged storm drains: 1,000 population		
	2002	2011	2013	2002	2011	2013
Station North	6.5	145.5	131.7	9.6	13.4	14.2
Tract 1205	18.4	160.5	167.3	12.6	16.6	18.3
Tract 604	9.2	87.1	113.3	2.6	9.3	8.5
Tract 904	5.4	85.1	57.4	2.4	12.6	6.3
Tract 1701	3.0	36.2	58.1	2.4	3.7	11.2
Tract 1801	2.5	47.3	36.4	1.0	3.2	5.9

REPORTED CRIME

As of 2000, violent crime rates were notably higher in Station North and Tract 1205 than they were in the comparison tracts (Table 16). By 2011 the rate in Station North had dropped considerably to be more in line with the other tracts (albeit still higher). However, there is a divergence between Station North and tract 1205 in 2013: the rate measured in Station North was higher again than it was in 2000, but the rate in 1205 remained lower (although it also increased). This could be related to specific geographies concentrated on the margins of the district, or it could be a data anomaly.

Property crime rates showed similar patterns: a drop between 2000 and 2011, but a divergence by 2013 (up in Station North, stable in tract 1205). These rates also varied widely in other tracts (such as 604, where the rate went from 162 in 2011 to 7 in 2013). Finally, domestic violence rates showed no single pattern: between 2000 and 2011 they increased in Station north but dropped in tract 1205.

While these data may represent interesting patterns, care should be taken in how to evaluate their meaning, especially given the notable swings they show. As with 311 calls, they depend on reporting rates and practices.

TABLE 16

Crime Rates*

	Violent Crime			Property Crime			Domestic Violence	
	2000	2011	2013	2000	2011	2013	2000	2011
Station North	72.4	33.8	79.7	156.6	101.5	202.5	50.6	72.5
Tract 1205	75.5	29.7	38.3	176.3	121.1	122.8	79.1	67.4
Tract 604	31.0	22.8	50.7	136.6	162.3	6.8	4.4	71.0
Tract 904	28.5	27.1	17.7	88.6	86.4	64.3	79.1	126.1
Tract 1701	32.0	30.0	33.7	168.6	93.0	89.9	60.4	58.7
Tract 1801	42.3	30.5	28.2	97.1	35.9	36.4	78.0	65.5

* Per 1,000 population

Juvenile arrest rates did not show a set pattern in Station North: the overall arrest rate increased in the Station North District but dropped in tract 1205 (Table 17). The violent crime arrest rate increased in both geographies, and the drug offence arrest rate dropped in both geographies. It should be noted that these rates are affected by the actual number of juveniles in the area, which dropped substantially between 2000 and 2010.

TABLE 17

Juvenile Arrest Rates

Year	Juvenile Arrest Rate		Juvenile Arrest Rate for Violent Offenses		Juvenile Arrest Rate for Drug Offenses		Juvenile Population Aged 10-17	
	2000	2011	2000	2011	2000	2011	2000	2010
Station North	302.6	363.6	48.2	81.8	122.8	90.9	228	110
Tract 1205	301.6	207.9	37.0	49.5	158.7	79.2	189	101
Tract 604	110.5	162.5	35.9	62.5	16.6	37.5	362	80
Tract 904	106.6	30.7	41.0	6.1	2.0	0.0	244	163
Tract 1701	138.9	96.0	6.9	72.0	55.6	24.0	144	125
Tract 1801	111.1	63.3	24.3	15.1	31.3	30.1	288	332

* Per 1,000 juveniles

Creative Activity and Economic Conditions

For the purpose of this study, there were few locally-available indicators measuring creative activity and economic conditions. Business counts were only available from 2008, well after the institution of the Station North District.

EMPLOYMENT

Tables 18 and 19 show business and employee counts first overall and second for arts-related businesses. Of the tracts studied, Station North is a larger employment center than tracts 1801 and 904, but is not as large as tracts 604 and 1701, which contain Johns Hopkins Hospital and The University of Maryland Hospital-Midtown, respectively.⁷ Station North also has the largest number of arts-related businesses and employment, although numbers dropped between 2011 and 2013.

TABLE 18

Businesses and Employment

	Number of Businesses			Total Number of Employees		
	2008	2011	2013	2008	2011	2013
Station North	173	142	172	808	970	1210
Tract 1205	156	134	162	769	961	1223
Tract 1801	35	25	47	314	250	493
Tract 904	55	51	72	699	752	391
Tract 604	172	169	211	1306	2367	2548
Tract 1701	196	111	137	575	777	2435

TABLE 19

Arts-Related Businesses

	Number of Businesses that are Arts-Related			Total Employment in Arts-Related Businesses		
	2008	2011	2013	2008	2011	2013
Station North	16	14	8	87	96	63
Tract 1205	16	13	8	87	92	62
Tract 1801	1	1	1	1	15	3
Tract 904	1	1	0	1	3	0
Tract 604	0	1	1	0	1	1
Tract 1701	2	6	4	2	28	8

HOUSING MARKET

In terms of vacant and abandoned properties and those with other violations (Table 20), rates in Station North and Tract 1205 were, for the most part, higher than those for the comparison tracts (excepting ‘other violations’ in 2011). It should be noted that in tract 1801, several properties that had been vacant

⁷ The large swings in tracts 604 and 1701 are due to changing reporting used by InfoUSA to compile these figures, as physicians’ primary locations changed to being hospital-based.

in 2011 were demolished by 2013, thereby lowering the vacant/abandoned numbers for that tract. While levels of distressed properties were higher in Station North/1205, so were properties with rehabilitation permits of over \$5,000.

TABLE 20
Property Characteristics

Year	Percentage of Properties that are Vacant and Abandoned			Percentage of Properties with Other Violations			Percentage of Properties with Rehabilitation Permits Over \$5,000		
	2001	2011	2013	2003	2011	2013	2003	2011	2013
Station North	18.0	30.3	36.6	13.0	13.3	25.1	2.4	9.6	8.4
Tract 1205	17.9	25.5	18.8	12.9	10.7	21.4	1.6	10.1	6.2
Tract 904	11.2	12.3	11.9	9.8	9.7	10.9	1.0	0.8	0.8
Tract 604	13.3	14.0	11.2	7.3	2.5	2.8	2.1	5.1	5.3
Tract 1701	3.5	3.7	4.2	5.6	14.0	15.3	4.3	3.3	4.7
Tract 1801	13.1	21.4	7.2	10.6	14.9	11.4	1.7	9.5	3.6

Home sales likewise increased during this period (Table 21): in 2000, only two properties were sold in Station North; by 2011 26 were sold (down to 13 in 2013). Sales prices likewise increased substantially: from \$26,250 to \$178,250 in 2011 and \$100,500 in 2013.

It is important to note that home sales volume and prices fluctuate significantly from year to year even within relatively ‘stable’ markets: the size of available units could change from year to year (if a larger share of smaller units were sold in 2011 than in 2013, then sales prices could go down). Without data on sales prices per square foot, we do not know the exact reason for differences between the 2011 and 2013 numbers.

Identifying the median number of days on the market is also useful here: Station North/tract 1205 and tract 1701 (which started at a much higher number of days) are down considerably, with trends in other tracts being mixed.

TABLE 21

Home Sales

	Total Number of Homes Sold			Median Sales Price			Median Number of Days on the Market		
	2000	2011	2013	2000	2011	2013	2000	2011	2013
Station North	2	26	13	\$ 26,250	\$ 178,250	\$ 100,500	43	26	19.5
Tract 1205	3	27	13	\$ 45,000	\$ 175,000	\$ 105,000	60	25.5	17
Tract 904	18	12	8	\$ 49,650	\$ 31,975	\$ 40,500	91	92.5	56
Tract 604	20	20	16	\$ 71,250	\$ 75,000	\$ 156,500	33	59	25
Tract 1701	11	8	8	\$ 58,500	\$ 82,000	\$ 90,000	153	105.5	26.5
Tract 1801	2	6	2	\$ 55,000	\$ 54,250	\$ 69,055	11	59	13.5

Conclusions

The Effects of Creative Placemaking in Station North

Making causal claims for the effects of the Arts & Entertainment district on livability in Station North are difficult. Local institutional actors with their own local initiatives, the relative weakness of the district's tax benefits, and the history of the neighborhood itself make choosing 2002 as a "baseline" problematic. Further, the limited nature of this analysis makes causal claims unrealistic: data presented in this study are descriptive.

However, the data do nonetheless show some noteworthy patterns. First, there is an arts-related component to changes in the neighborhood: arts-related employment has increased substantially since 2000. The local housing market in particular is also much more active in 2011 (and 2013) than it was in 2000, and the growing number of significant rehabilitation permits indicates an increased interest in redevelopment more generally. Other measures show other emerging patterns, such as the growing share of those with college degrees and the increasing incomes of homeowners, relative to the city as a whole.

However, challenges remain: unemployment and crime remain high, as do vacancy, abandonment, and building violations. Housing cost burden is also increasing, indicating that a significant share of the local population remains stressed.

Using Data Well

A central challenge to comparing national to local data directly is that they are often more complimentary than directly comparable. Of the measures described here, only home sales are directly comparable, with both sources showing similar trends: a notable jump in sales and prices between 2000 and 2011, and a slight fallback in sales prices in 2013. That said, the actual number of sales shown vary: national (HMDA) data show a trend from 6 to 11 to 22, while local data go from 3 to 27 to 13.

While we do not have enough evidence to discern whether particular categories of livability are better suited to local or national data, some indicators, such as quality of life issues and community attachment are more easily measured using local data than are nationally-compiled data sources.

Further, geography is extremely relevant: while the borders of Station North and tract 1205 are *relatively* similar, they are different enough to indicate that the ability to draw exact boundaries around an area of interest is extremely important.

As such, users of data need to know what exactly they are looking for, and how to understand what they find. In terms of national data, the increasing centrality of the Census' American Community Survey means that users need to be able to understand what it means for data to be collected over a range of years rather than during a single point in time. This is not just a matter of conceptual clarity, but especially relevant when periods of time overlap times of major socioeconomic change: for example, 2006-2010 5-year ACS estimates straddled the end of the housing boom and the Great Recession.

While National data present challenges, local data do as well. Users need to know the story behind data, and when something looks strange there are often reasons for it such as changing definitions or reporting requirements. As such, local users need to know – and of course, are often well-placed to understand – context. Finally, local data providers, such as those participating in the National Neighborhood Indicators Partnership (NNIP), are invaluable resources as they know the locality as well as the constituent data.⁸

⁸ <http://www.neighborhoodindicators.org/>

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