CASE-MAKING & SYSTEMS CHANGE IN ARTS & CULTURAL EDUCATION:

Overview of Documented Knowledge

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Creative Generation believes that youth create change. We are a values-driven global collective that collaborates with young creatives and those who cultivate their creativity to take local actions towards global changes in pursuit of a more just world. Founded in 2019, Creative Generation operates five signature programs: the Campaign for a Creative Generation, the Institute for Creative Social Transformation, the Academy for Creative Leadership, the Incubator for Creative Impact, and the Foundation for a Creative Generation.
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ElevateArtsEd illuminates effective practices in arts education advocacy. Its focus is to build community around the issues that are central to the provision of arts education, including coalition building, strategic communications, knowledge sharing, and giving voice to advocates. Laurie T. Schell is founding principal of Laurie Schell Associates | ElevateArtsEd, providing consulting services and issue expertise in arts education. Laurie Schell has worked for over four decades to foster arts education through strategic alliances and partnerships, policy and advocacy campaigns, innovative programs, directed research, and mobilizing constituencies for action.
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case-making & SYSTEMS CHANGE

In 2021, a collaborative project between Creative Generation and ElevateArtsEd emerged to better understand how practitioners - such as artists, educators, community leaders, and more - can make the case for and also advocate through arts and cultural education to drive systemic change and address the complex challenges faced by communities.
Learn more: www.Creative-Generation.org/CaseMaking

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Understanding a Summary of Documented Knowledge

Conducting a Summary of Documented Knowledge is a research and documentation process, which recognizes the extensive formal and informal knowledge passed between generations of practitioners in the fields of culture, education, and social change. We continually refer to "documented knowledge," in recognition of the deeply-rooted oral histories, cultural practices, and social knowledge passed between generations of key practitioners in our fields, like teaching artists, educators, and culture bearers. These histories and traditions are often unrecognized in Western European academic traditions of "literature reviews" which rely on the publication of the written word; so, we reject this notion and broadly accept the myriad media of 'documentation' and 'knowledge' within these fields of practice.

Creative Generation is committed to publishing Summaries of Documented Knowledge to recognize and amplify the diverse array of types of knowledge and ways of knowing throughout our work. This presents two opportunities: first, to gain a better understanding of the breadth of knowledge on a given topic, and second to resist the systems which prioritize certain sources of knowledge and ways of knowing, excluding some knowledge-bearers.

This Summary of Documented Knowledge is organized into the following sections:

- **Introduction**: This introductory section provides details and context around the specific question or observation being explored. It also highlights the primary fields or sectors of focus and places boundaries on the scope of the exploration.

- **Framing**: This context-setting section provides a high-level overviewing of the findings from the process and provides details on the organization and flow of the subsequent sections.

- **Thematic Sections**: Each section provides an overview of the documented knowledge on the given topic.

- **Conclusion**: This concluding section provides a reflection on the findings and identifies observed gaps in the documented knowledge, which should be further explored.

Introduction

Arts and cultural education holds a distinctive place in homes, schools, and communities. In K-12 public education, arts education – defined in American public policy as the study of dance, media arts, music, theatre, and visual arts – thrives in communities that value the arts and culture as essential parts of youth and human development, and moreover, as a well-rounded education. That said, the arts are not universally offered in all schools. Advocates for arts and cultural education have worked for more than 40 years to increase understanding and influence public will with the goal of embedding the arts in education policy and practice for all youth. The field has deepened its knowledge of how students learn in and through the arts with brain research, data analysis, and value added and correlational studies that demonstrate the enduring value of teaching the arts. Yet the universal provision of arts and cultural education is elusive. Advocacy continues to be important and ongoing.

This resource serves as a review of current literature on advocacy, case-making, and systems change: it incorporates overarching concepts from the distinct sectors of culture, education, philanthropy, and social movements; and includes bodies of knowledge including in the arts, health, housing, public policy, social justice, and the environment. The publication establishes the need to intertwine the science of advocacy — building blocks for understanding what effective advocacy looks like — and the art of advocacy with calls for improvisation, adaptability, and generative thinking, all characteristics of art making.

Framing

Case-making and Systems Change for Arts and Cultural Education is presented as a multi-faceted guide to advocacy that begins with the SELF (individual responsibility), incorporates the FIELD (those around us), and challenges us to influence the SECTOR (the larger context). The *Overview of Documented Knowledge* highlights both the theory and practices that enable effective advocacy.

The project is represented visually by an oculus lens graphic that describes concepts meant to enhance our experience and effectiveness as advocates. The thematic concepts — See, Balance, Link, Build, Understand, Acknowledge — are guideposts for the practitioner. The eye-like lens is circular in shape, with the ability to expand or narrow in focus. It is continuous, with no defined beginning or end, with flexible and overlapping facets, conveying a message that opportunities for engagement exist at every stage. See the graphic and further description on the next page.

This resource describes the six overarching themes that are developed more comprehensively in the articles, which undertake to better understand how practitioners– such as educators, artists, community leaders and more– can make the case for and also advocate through arts and cultural education to drive systemic change and address the complex challenges faced by communities. Eight articles address distinct facets of advocacy effort, based on research, lived, and observed experience. Each article is framed around the intertwined themes listed below, with directed questions for the reader and opportunities for deeper engagement.

Intertwining Knowledge

This project presents advocacy within three categories, as identified in Jeff M. Poulin's essay "Embedding Advocacy Into Your Practice" published by the Teaching Artists Guild:

Advocacy for Self includes articles on individual responsibility and the need to experience the work from multiple perspectives.

Advocacy for the Field explores structural elements of advocacy efforts and the importance of strategic communications, issues that may be relevant to fields within the larger landscape (e.g., educators, teaching artists, administrators).

Advocacy for the Sector explores systems change through arts education and stakeholder participation and engagement strategies.

Making the Case for Justice looks at pathways to consider in the work to realize principles of social justice in the arts.

Key learning themes emerged from a review of the extant literature on advocacy, case-making, and systems change in the arts, health, housing, social justice, environment, and economic sectors. Each are based around the necessary action of a practitioner within their own context:

- See the larger system and work within a local context
- Balance organizational structure and flexibility
- Link communications strategies to goals
- Build adaptive processes that encourage engagement
- Understand the dynamics of systems change
- Acknowledge progress at all levels

Identified and explored throughout the articles, these key themes are further explored to add to the body of documented knowledge compiled in the following sections.
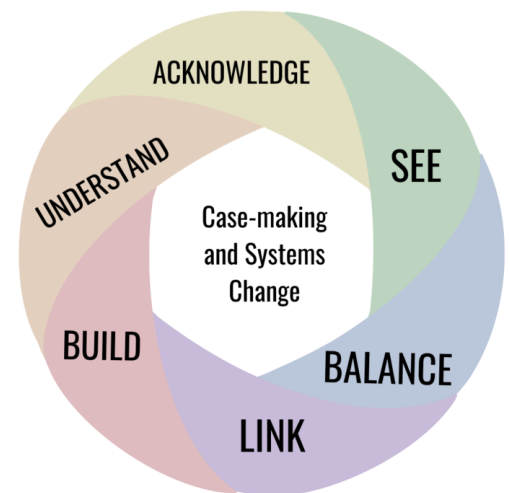
See the larger system and work within a local context

The ability to see the big picture "from the balcony" ensures a clearer view of reality (Heifetz, 2009). Stepping away from the day-to-day fray allows leaders to detect patterns, ask questions and reset as needed. Getting on the balcony may be as simple as taking on the role of observer at a meeting rather than being a participant. Or setting up rigorous data systems that enable objectivity (McCannon, 2017). It is also critically important to be on the dance floor to ascertain what is happening on the ground (Heifetz, 2009). One strategy for being on the dance floor is through a network of advocates. "Network-centric advocacy focuses resources on enabling a network of individuals and resources to connect on a temporary, as-needed basis to execute advocacy campaigns" (Kearns, 2007). This approach reflects the current reality of local decision making in education and with it, the need to be hyper-local in advocacy outreach. Further, in a review of large-scale systems change, trusting the leaders in the field (local context) is considered a hallmark characteristic of effective networks (McCannon, 2017).

Balance organizational structure with flexibility

Organizational structures for advocacy vary from temporal networks that come together for a limited time to address a specific cause (Kearns, 2007) to coalitions (McCammon, 2015) to large-scale movement-building enterprises that exist over long periods of time (Sawtell, 2017). Whatever the type, the literature suggests the importance of balancing structure with flexibility. Effective advocacy requires structure, together with nimbleness and adaptability. In an analysis of organizational approaches in the context of social movements, Den Hond states, "organization is not inherently good or bad, nor is it necessarily and of itself beneficial or detrimental to social movements" (Den Hond, 2015, pp 291-305). Organizational structures should be assessed often for relevance and efficacy rather than aspire to a specific ideal (Den Hond, 2015).

Collective impact is a disciplined, yet flexible cross-sector approach to solving social and environmental problems. Not structured for advocacy outcomes per se, such approaches are gaining traction in the arts and arts education sectors, with successful programs funded by the National Endowment for the Arts. In a functional way, collective action is advocacy at its finest. The five conditions of collective impact are: common agenda, shared measurement, mutually reinforcing activities, continuous communication, and backbone support (Kania, 2014).

Netcentric Campaigns, a nonprofit based in Washington, D.C., describes "... seven elements that must be present in order for an advocacy network to function at its highest capacity: Social ties, a communications grid, a common language, a clear vision, shared resources, actors and feedback mechanisms" (The Seven Elements, n.d.). These elements are present throughout the literature on the formation and sustainability of advocacy coalitions (Van Dyke, 2017).

Link communications strategies to goals

In Tiffany Manuel's book, website, and YouTube video, the author has distilled principles for how to make a compelling case that will energize and inspire action. According to the author, the three components of Strategic CaseMaking™ are framing and communications, the power of storytelling, and call to action based on a value proposition (Manuel, n.d.). Arts advocates are proponents of narratives and storytelling, yet there is often a disconnect with larger communication frames that link narrative strategies to the overarching goal.

Social media has amplified the ability of individual stakeholders to give voice to issues, and with it comes an often confusing and unwanted barrage of information. "As part of a coordinated effort, social media... enables individuals to contribute to participatory dialogue about social issues, collaborate on change efforts, and establish a sense of community" (Scott, n.d.). The article reinforces the use of social media as a tool in service to a larger goal, not as an end itself.

A rise in the use of hashtags is a subset of the social media phenomena. "Hashtag activism happens when large numbers of postings appear on social media under a common hashtagged word, phrase or sentence with a social or political claim. "Narrative agency is communal, invented, skillful, and protean [versatile]" (Yang, 2016). Hashtags, used in conjunction with personal narratives (storytelling) on social media, have the potential to amplify the narrative and create a strong bond between diverse yet like-minded activists.

Build adaptive processes that encourage engagement

In The Practice of Adaptive Leadership, the authors draw from evolutionary biology and the successful survival of species to offer analogies for leaders. The lessons translate for arts advocates who are engaged in change efforts: Successful adaptive changes build on the past rather than jettison it. Organizational adaptation occurs through experimentation. Adaptation relies on diversity. New adaptations often generate loss. Adaptation takes time (Heifetz, 2009). The need for adaptation or iterative processes is echoed throughout the literature (Kania, 2014) (Manuel, n.d.). The sheer speed of information flow and global events makes this an important and recurring theme.

Entwined with the need for adaptability is stakeholder engagement. In the literature of social change, stakeholder engagement is described as the process of understanding stakeholders' views, being accountable to them, and using the information in decisions. A spectrum of engagement flows from inform, to consult, involve, engage/collaborate, and empower (McCarthy, n.d.). This concept is analyzed in the implementation of California's Local Control Funding Formula with its accompanying Local Control Community Plan. Of particular interest is the analysis of conditions that constrain engagement, including limited knowledge or fatigue related to engagement issues, lack of trust, and lack of a prior history of community engagement. (Marsh, 2018) (Perry, 2019). The research is relevant to the arts education field with the current context of local control in education coupled with the required community input processes to access federal funds (e.g., ESSER 3.0).

Engagement is also about knowing which tactics will engage the public and decision makers. In a recent study, researchers find that creative activism is more effective, in part because it is more affective (emotional), than conventional forms of activism (Duncombe, 2021).

Understand the dynamics of systems change

Systems change involves a complex, cross-sector approach with layers of engagement, leadership, tactics, and accountability. Individuals and organizations come together to solve gritty, system-wide problems. In "The Dawn of System Leadership" the authors highlight the system leadership of Nelson Mandela through the Truth and Reconciliation Commission in South Africa. Per the authors, one of the core capabilities of system leadership involves shifting the focus from reactive problem solving to co-creating the future (Senge, 2015). The need to develop more open and generative processes in advocating for change should resonate with the arts, culture, and arts education fields.

In thinking about large scale systems change, arts and arts education may suffer from competition with other social sector advocates and with the oftentimes single-issue cause that may not appeal to a broader constituency. That said, systems change can also be successful on a smaller scale. Individuals have always been at the heart of advocacy strategy. Author Julie Hawkins describes a "changed battlefield, where individuals have an increasing ability to organize and leverage community networks to effect policy change (Hawkins, 2012).

Personal accountability is further evident in describing the principles and practice of "soil-keeping," a metaphor for the dynamic process of achieving social justice. The practice of soil-keeping provides individuals a values-based foundation for their work: 1) End harmful disturbances; 2) rest; 3) protect; 4) reforest; 5) foster diverse relationships; 6) grow and nourish; and 7) impermanence (Kiley, 2021).

Acknowledge progress at all levels

Making the case for arts, education, and justice is multifaceted. As with the artistic process, so, too, the process of advocacy engagement is as important as the final product or outcomes. In an analysis of the United States Social Forum (USSF) and the Boston-based delegation called the Boston Freedom Riders, a key takeaway is that the impact of these activities should be viewed in light of their "generativity as "movement-building machines." "... [It is the] spillover effects such as the creation of social capital that links individuals, organizations, and movements across issue, sector, and scale..." (Juris, 2014). Julia Coffman's advocacy strategy framework recognizes the non-linear and unpredictable nature of advocacy, acknowledging a continuum of progress based on two dimensions of audiences targeted and changes desired (Coffman, n.d.).

Bringing new arts advocates onboard-- the pedagogy of advocacy-- is an important element in seeding the future of advocacy. Teaching public advocacy involves building understanding of how governmental entities make policy decisions, key levers of influence, and the practice of creating workable solutions to policy issues (Eaton, 2014) (Milling, 2016). This is an area of opportunity in the arts. With a few notable exceptions, advocacy training programs in arts and arts education settings are either too brief, too limited in scope, or non-existent.

Conclusion

There is much to learn about the nature of making a case for cause, from an array of structural elements to the importance of personal commitments, to articulating a theory of change and being grounded in a values-based proposition. Trust, relationship-building, knowledge of systems and processes, political know-how, and communications savvy are all key elements. While it can be a lot to take in, arts advocates can take heart in an article authored by Bryan Weiner. In studying organizational readiness for change, the theory suggests "... that the strategies that change management experts recommend are equifinal. That is, there is no 'one best way' to increase organizational readiness for change" (Weiner, 2009).

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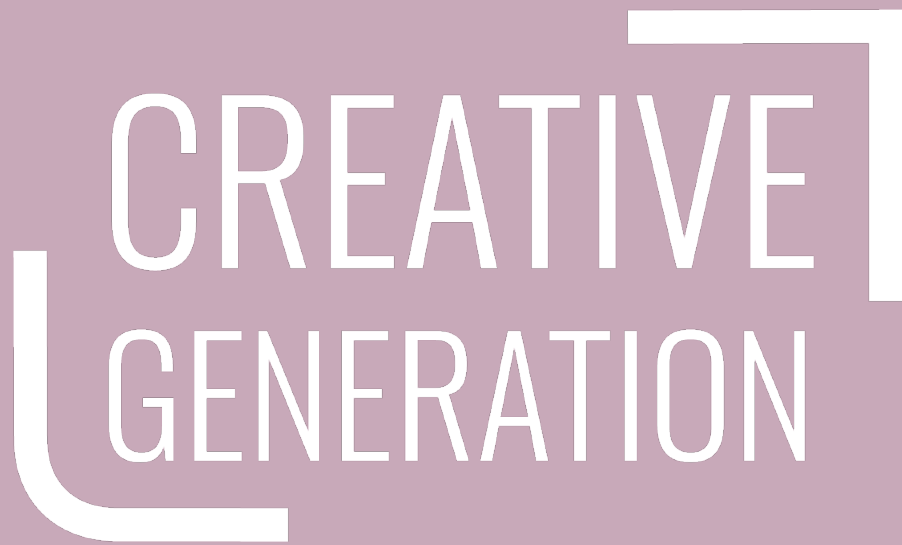
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