EXPLORING THE STATUS OF EDUCATION DEPARTMENTS WITHIN NONPROFIT THEATRE ORGANIZATIONS

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This work is dedicated to arts education directors and staff members everywhere who never stop searching for ways to help their programs succeed.

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ABSTRACT

This study uses interviews, financial documents, and public materials to examine the relationships between five nonprofit theatres and their respective education departments. After analyzing commonalities among the relationships, the researcher identifies five indicators that reveal the nature of the relationship between the education department and the rest of the organization. These indicators are (1) the reason behind the education department's foundation, (2) the ability of the education director to connect with other departments within the organization, (3) the capability of the education department to find and foster contributions, (4) the capacity of the education programs to earn an income, and (5) the use of data to link the education department with a positive future of the organization. Finally, by comparing the five theatres, the research begins to make connections to the overall field of educational theatre and recommends ways to increase educational advocacy within theatre organizations as a way to protect the future of education departments.

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TABLE OF CONTENTS

LIST OF TABLES

LIST OF ILLUSTRATIONS

CHAPTER 1

INTRODUCTION

Education departments within nonprofit theatres are facing lean times. With the complicated funding structure of nonprofits to begin which, coupled with the economic downturn, theatre budgets are being cut and programs are being downsized. Educators and theatre practitioners are struggling to retain the integrity of their work while ensuring sustainability. It is challenging for arts managers to fight for educational programming with conviction however, when they themselves are unsure of their impact on the organization as a whole. Proponents of education programs need to be able to enumerate the value of the activities and explain why they are important to the company. This ability goes beyond producing a letter from a pleased participant or a recording of a successful performance. There is a need for hard, compelling data with comprehensive explanations. The survival of education departments in theatre organizations depends on advocates' ability to prove worth, in both abstract and concrete measures. This study cracks the surface and should serve as an important starting place and model for future data collection and advocacy efforts.

Research Questions and Definitions

Most educational theatre practitioners are able to eloquently explain the intangible benefits of their programs. However, the field desperately needs to find shared practical language in order to promote education departments and ensure their continued survival. In an effort to aid in this search, the researcher began with the following questions:

- How do education departments advocate for themselves within their organizations?
- Are there practices or methods of advocacy that are more successful than others?
- What adjustments, if any, can be made to increase the value of an education department to its organization?

The study uses in-depth interviews and analysis to examine five *nonprofit theatre organizations,* defined in this study as companies with 501c(3) status and a mission to produce theatrical work. The theatres have education departments, but are not solely devoted to education. Such a concentrated focus would skew the overall results and make the data of little use to the majority of education departments. The annual budgets are above five million dollars. This higher revenue level supports multiple programming initiatives and provides a range of information that can be utilized by theatres, both large and small.

Education departments refer to an organized group of programs designed to spread theatrical knowledge to community members. These programs encompass any age range and are meant for a number of audiences. Activities take place at the theatre, in schools, or on a virtual site, but are all run by the theatre organizations. Programs are either one-time events or events occurring over an extended period, including student matinees, teaching artist residencies, sequential art classes, professional development for teachers, or education-based research.

This study will look at organizations within the greater Washington area, including nearby communities in Virginia and Maryland. This scope covers both urban and suburban communities and will allow the researcher to obtain detailed information while giving a microcosm of the country.

Significance of the Study

Theatre Communications Group, Inc. (TCG) compiles the current data collection system used by nonprofit educational theatre departments. TCG's annual survey has provided quality statistics for over ten years. The comparative data available to the public, however, does little to show the status of education departments in relation to the larger theatre organizations. As the nonprofit theatre industry is experiencing shifts in income, it is instructive to see how education departments are fairing in relation to those shifts. Hopefully, this information will give education directors the fodder they need to raise the status of education departments within the company. Educational programming should be seen as a component of the theatre's mission, but organizations cannot ignore the ability of a program to be self-sustaining. If true, self-sustaining education programs would impact the status of the education department within the organization and ensure its longevity. If this is not the case, as many believe, education directors need to find a balance between the department and the rest of the organization; a balance between complete dependency and total autonomy. An education department could profit from an inventory of its status in the organization with further recommendations to improve its position.

Limitations and Complications

Most of the information for this study comes from education departments and does not, in general, include the opinions of the organization's administration. During the researcher's interviews, many education directors revealed that their biggest challenge is a lack of time. With this in mind, the researcher worked to keep interviews and questionnaires as short as possible. Additionally, all financial information given by the education directors came from internal documents and the researcher had no way to check the veracity of the responses. Finally, the researcher had to choose between studying a large number of theatres on a surface level and speaking with a smaller number of theatres at an in-depth level. The researcher chose the later because in-person interviews aided the candidness of the conversations, which would not have occurred in a larger, more impersonal study. Any observations and analysis true for the five theatres might not necessarily be true for all organizations nationwide or those of different sizes. The field of educational theatre would benefit immensely from a study similar to this one, but conducted on a national scale.

CHAPTER 2

LITERATURE REVIEW

"I'll huff, and I'll puff, and I'll blow your house down!" Andre bellows in his deepest wolf voice. He then points across the room to his two friends and directs,

"Now you have to run over there." James and Marceline nod fervently and run to the next cardboard box, their curly cue tails bouncing as they step. They huddle together and giggle as Andre follows, stomping his feet and swinging his legs out wide as he walks. He pauses and looks back at the teaching artist,

"Can this house be made out of cinder blocks instead?"

Andre, James, and Marceline are experiencing a creative drama session in their classroom led by a teaching artist contracted with a regional theatre company to work with local schools. By enacting the well-known story of *The Three Little Pigs*, these pre-schoolers are taking part in a shared dramatic world, where their creativity and imagination are without boundaries. This world is also created when seasoned actors perform the finale of *Les Miserables* to an audience of teenagers, and extends to a room full of English teachers learning how to bring the Salem Witch Trials to life in the classroom. It includes middle school students devising a physical theatre piece about bullying and envelops the row of senior citizens bouncing their knees to a Rodgers & Hammerstein classic. Educational programs in theatres take many forms, but they all involve the same magic of growth and new awakenings. In his book, *How Theatre Educates. Convergences & Counterpoints*, David Booth writes:

> I need for students of all ages to be shocked and surprised by ideas that can only be shared in the safety of the theatre frame; I need the sounds of powerful language filling their impoverished word world; I need for them to sense how they and those on stage breathe simultaneously as one; I need to witness the struggle of students of every age participating in drama work, listening to each other as they interact, so that they begin to

> see that everyone matters if the fiction is to become real; I need to know that my students can read the conventions of theatre as proficiently as they can a Friday night film. I know that theatre can help them to enter their worlds more fully, to see more clearly, and feel and think all at once. I need theatre that will continue to teach them for all their days (Booth and Gallagher 2003, 21-22)

Theatre practitioners know the benefits of theatre arts; how experiencing drama increases self-confidence, fosters collaboration, and develops leadership skills, all while focusing on the art form and building knowledge in the aesthetic. However, the concept of theatre education in arts organizations has taken hold only in the past fifty years (Renner 2013). Since then, this young field has evolved and expanded, while at the same time, it feels the constraints of the economy and the fickle whims of popular funding.

The Field of Educational Theatre

Researchers struggle to fully analyze the field of educational theatre because "educational theatre" as a concept has many different forms. One of the major distinctions between educational theatre programming and arts education in general is evident in the simple phrasing of its name. Lin Wright defines *arts education* as "the comprehensive, sequential education suggested by the arts standards." In contrast, "*arts in education* is about arts performances and museum trips for students, artist-in-residence programs, and after-school programs" (2000, 14). For Wright, the distinction between the two lies in the amount of time designated for learning and the interconnectedness of lessons. Single field trips or short units are not seen as effective ways to teach the craft of theatre. Neither is experiencing the art form as an audience member. Shifra Schonmann takes this idea a step further in delineating "theatre" as the study of the aesthetic through participation, observation, or general immersion, and by labeling "drama" as a mode of instruction to teach other subjects (Schonomann 2005, 36). Using this logic, a theatre class would involve mastering acting techniques and a drama class would use acting skills to learn about history or language arts. Schonmann does not explore the specific sequence or time frame of teaching, as Wright does, but looks instead at the motives behind the lessons. If the objective of a lesson is to teach theatrical skills, it is "theatre." If the ultimate goal is learning another subject, it is not "theatre," but the lesser "drama."

Purpose, name, and scope are not the only defining factors in the various categories of educational theatre. Programs can be stratified according to the location, the instructor, and the age of the students. In total, the Theatre Communication Group's (TCG) annual education survey lists thirty-eight different programming options. Programs could be further categorized by the location of their intended "student audience" whether in a classroom, on the stage, or sitting in a theatre audience. The programs also range from acting classes at the theatre to student matinees, and even student assessment tools (Baskin 2010). Although programs can and do vary greatly, they can still be categorized into three general groups: school partnerships, instruction of the craft, and education and outreach.

The first of these three major categories, school partnerships, describe a collective effort to spread theatre to students in their classrooms. This most often involves collaboration between classroom teachers and teaching artists, who are individuals hired by a theatre company to teach their craft. The artist and the classroom teacher work together to create and facilitate lessons using dramatic techniques. Sometimes units are designed around a particular topic, like the Civil War. Lessons could take place over months. At other times, students receive a single workshop to prepare for a field trip to the theatre. Student matinee performances are one of the most popular school partnership programs because they do not significantly take away from teaching time. Many theatre companies create study guides that provide teachers with curriculum connections, lessons, and further resources. Whether students are brought into the theatre to watch a production or teaching artists travel to the classroom, the partnership between schools and theatre organizations are special because they engage students in a learning environment vastly different from their regular classroom lessons. Teaching artists can be positive role models in more of a coach or facilitator relationship that provides a good contrast to the stricter student-teacher paradigm (Fiske 1999, ix).

Teaching artistry as a profession began in 1889 with Chicago's Hull House. These professionals, artists of all genres, worked in arts organizations, but did not enter the public schools until the mid-1960s when poets began helping students write their first poems. The profession was relatively rare until the 1990s when research began to show the positive impact of arts education on student learning (Rabkin 2011, 6-7). Now, over half of all teaching artists work for arts nonprofits, while schools, community centers, and social service organizations employ the remainder (Rabkin 2011, 8). While most teaching artists work with students in classrooms, others focus on spreading theatre by teaching other teachers. By giving professional development workshops, many teaching artists spread their craft even further. Teaching artists affect exponentially more students when they teach classroom teachers to utilize dramatic techniques and the classroom teachers then integrate the techniques in their lessons on a regular basis. In fact, Jane Polin believes that increasing the prevalence of teacher development workshops should be a major priority for arts education departments in nonprofits (Polin 1992, 37).

The second type of educational programming in theatre companies involves learning the craft of theatre, not in schools, but as a facet of the arts organization. These classes are typically taught by artists themselves and are grouped based on topic, age, and level of skill. Topics can range from scene study, to musical theatre, to lighting design. Students generally pay a fee to participate and are able to take progressively more challenging classes each semester. Some classes run once a week for a few months, while others are in the form of intensive, weeklong summer sessions. Many of these sessions culminate in a final performance. Stephani Etheridge Woodson writes that the most effective theatre programs involve the students in all the phases of the production process and give the students a chance to use theatre to make meaning of their lives (Woodson 2004, 4). According to Woodson, students gain the most when they are able to make important decisions and have an impact on the final product. These students are expected to finish the program with added theatrical skill, including knowledge of the art form's aesthetic.

The final category of theatre education programming is outreach and research. Outreach programs use theatre as a tool to give back to the community, and in the process, try to document how theatre can be used to impact those communities. These types of programs are "not afraid to explore big questions, social issues, and/or problems" and are able to "create and promote kinship bonds deeply connected to the …surrounding communities" (Woodson 2004, 27). Research provides data that can be used to assess and improve all educational programming and to document current trends in the field. TCG's annual education survey revealed a jump in the number of such research and assessment programs (Baskin 2010), which illustrates the fact that education departments are working to ensure that each program is reaching its highest potential.

The History and Purpose of Educational Programming

Although the organizational structures of education departments in theatre organizations are quite complicated, their short history is straightforward. Nonprofit theatre organizations began in the 1940s (Voss, Cable, and Voss 2000, 332), but education departments were not established until the 1970s. These departments were not integral to the mission of the theatres and educational programming held a low status level. Artists did not think of themselves as educators, nor were they trained in teaching. Instead, the education departments' employees were teachers who generally had little professional artistic experience ("Supporting the Base" 2002, 6). Some theatre companies operate this way today, but many have embraced their education departments as an obligation that comes with being in the public trust. The number of programs and employees vary widely with each organization, making it difficult to create a blanket statement about the status of education in modern nonprofit theatre companies. It is interesting, however, to examine the impetus that led to the genesis of each education program.

There are four motivating factors in creating an education department. Some are harder to capture succinctly than others, but all reveal the purpose of the department within the theatre organization. These factors include: (1) a quest for future audiences, (2) the need to cultivate the next generation of artists, (3) community outreach, and (4) an alternative financial resource. For many organizations, educational mission statements give clues to the reasoning behind their existence and thus their specific array of programming.

On its web site, La Jolla Playhouse states that its "goal is to provide educational opportunities that will deepen the relationship with existing patrons and encourage both adult and youth audiences to attend the productions with a heightened awareness and understanding" (Education and Outreach, La Jolla Playhouse). This illustrates one of the most widely referenced rationales for establishing a thriving education department: the creation of future audiences.

A 2008 survey conducted by the National Endowment for the Arts showed decline in arts participation, a drop of five percent over the last six years (Rabkin and Hedberg 2011, i). The two preceding surveys confirmed a consistent decrease in attendance at what are called "benchmark events." These events include classical music and jazz concerts, musical and non-musical theatre, opera, and ballet performances. This decline is troubling for arts managers.

One of the major findings of the NEA study was the discovery of the high correlation between participation in arts education at a young age to arts participation later in life. Children who had received classes in a given art form were twice as likely to have attended a benchmark event in the year prior to the survey than children who had not (Rabkin and Hedberg 2011, 36). Additionally, the likelihood of arts participation in general increased for children who studied multiple art forms (Rabkin and Hedberg 2011, 29). Arts organizations should be able to capitalize on this clear data to advocate for the idea that the more arts education opportunities are available, the more likely arts organizations will be able to build and retain future audiences. In the introduction of the NEA's publication, Rocco Landesman states definitively "all of us who care about the arts in this country have to care about arts education" (Rabkin and Hedberg 2011, i).

The quest for future audiences is important and necessary to the healthy futures of arts organizations, but so is the need for cultivating the next generation of artists. Many arts education programs are charged to identify and inspire future artists. This responsibility has fallen on the shoulders of nonprofit theatres due to the dramatic drop in arts education in public schools. In the mid-1970s and 1980s, economic troubles brought cuts in state and local budgets, which forced schools to lay off teachers and cut arts programs. The situation was extreme; in the 1975-1976 school year New York City public schools laid off almost 25% of its teachers (Bodilly, Augustine, and Zakaras 2008, 10). In 1983, the National Commission on Excellence in Education published "A Nation at Risk: The Imperative for Educational Reform" a document that became the basis for all future national education policies, including "No Child Left Behind" and "Race to the Top." The publication stated that, in order for the United States to remain globally competitive, schools needed to concentrate on "the basics" (Rabkin 2011, 9). This began almost three decades of relegating arts education to the lowest priority in order to provide more time for reading and mathematics. Basmat Parsad assessed the status of theatre education in the 2009-2010 school year. She found that only four percent of public elementary schools gave specific drama or theatre instruction. Of those schools Parsad identified, 58% taught the subject at least once a week but a trained theatre teacher taught only 42% of the classes. The situation was much better in secondary schools, but still less than ideal, with only 54% offering drama classes (Parsad and Spiegelman 2011, 2). The lack of theatrical opportunities in public schools could negatively impact the next generation of artists. Many theatre organizations feel they have no choice but to divert money and other resources that are desparately needed elsewhere in an attempt to fill the void and they carry with them the constant worry that they are the last hope in the preservation of the art form.

In fact, A Contemporary Theatre (ACT), located in Seattle, Washington, says that their education programs "play a key role in the pursuit of new art, new thought, and a higher degree of artistic excellence" (Education ACT). In contrast the Arizona Theatre Company states simply that their education programs "provide an educational bridge between our communities and our work" (Arizona Theatre Company Education). This illustrates the third motive for educational programming in theatres, which lies in community outreach. By creating programs that connect with community members, the organization builds supporters and gets an inside look at what shows and projects would interest their customers. The more vital the organization can become to a community, the more local citizens will fight to keep it around. Hartford Stage Company uses "theatre techniques to build community and citizenship, to promote a passion for literacy and creative expression, and to encourage life-long learning" (Education Hartford Stage). Additionally, by becoming prevalent in every day life, the organization has a built-in opportunity for marketing. Word of mouth and stories in local newspapers can permeate the population and solidify the organization's mission and audience base.

The fourth and final motivating factor in creating an education department is much harder to pin down. Although nonprofit theatre is not designed to be a moneymaking industry, each organization does have to support its programming. Education departments provide alternative mechanisms to receive grants and other support from foundations and corporations. Furthermore, there are government sources, such as the Department of Education and the National Endowment for the Arts, which specifically support arts education programs. Finally, many education programs provide additional sources of earned income through ticket sales and class tuition. The nature of educational programming as a community resource makes it distasteful for many artists and organizations to see these programs as a viable source of revenue. However, this stream is plain to see on the theatre's budget. This knowledge may be used to solidify the standing of the education department within the larger organization. In an effort to explore this monetary relationship further, a discussion and analysis of nonprofit funding follows.

The Nonprofit Funding Model

According to the Americans for the Arts fact sheet, in 2011 an average nonprofit arts organization's revenue is divided into seven categories. Figure 1 depicts these different revenues. Earned income, which includes ticket sales, space rental, and other miscellaneous fees, makes up about 60 percent of a nonprofit art organization's revenue. The remaining six categories make up the balance, around 40 percent, and are all part of contributed income. The most prevalent contributed sector is the individual donor, which provides 24 percent of the revenue. Foundations and corporations make up four and three percent respectively, and the remaining seven percent is divided among government support in the federal (3%), state (2%), and local (4%) levels (Americans for the Arts 2011). This snapshot of today's revenue stream reveals how dependent nonprofit arts organizations are on contributed income and gives a picture of how important each funding category is to their survival.

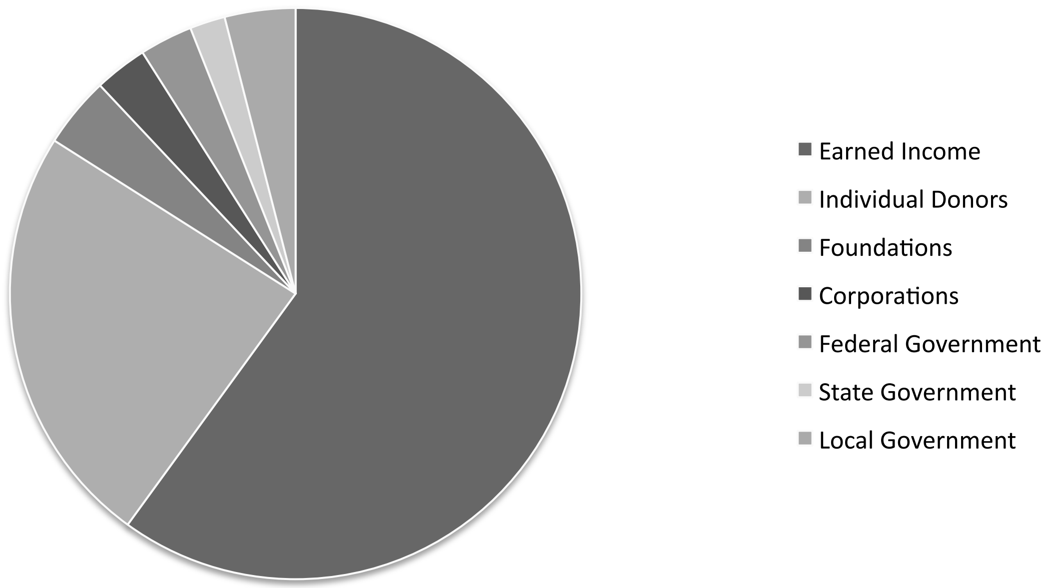

Figure 1. Nonprofit Revenue Sources

The current state of nonprofit funding becomes more complicated as funding mechanisms have evolved over the past few decades. Nonprofit professional theatres first arrived on the scene in the 1940s and grew in number over the next two decades with the formation of the National Endowment for the Arts (NEA) and the matching grant system created by the Ford and Rockefeller Foundations (Voss, Cable, and Voss 2000, 332). The bumpy ride of nonprofit funding ended in the 1990s when a successful economy provided more money, more ways to give, and fairer ways to distribute the money. In this decade, "new philanthropy", dubbed by Nina Cobb, consisted of a large growth in the number of foundations and doubled private sector giving (Cobb 2002, 125). All was not perfect for the arts world in the ten years leading up to the new century, however, as the growth rate for all private giving was 7.3% but the arts was only increased by 3.9% (Cobb 2002, 127). In the next five years, from 2000-2005, the economy pivoted and, although individual and foundation giving to the arts did not change, funding from corporations dropped significantly (Americans for the Arts 2006, 6). All three sectors, however, did increase their giving in education and human services. Cobb calls the current phase a time of "hands on" philanthropy with a focus on accountability and the creation of true partnerships between funders and fundees (Cobb 2002, 129). A government publication "The Future of Private Sector Giving to the Arts in America" refers to the close relationship between donor and recipient as "high touch" (Americans for the Arts 2007). Jeffrey Kimpton writes that this trend includes more focused grants that give specific requirements in the Request for Proposals (RFPs) phase, in which the funder publicizes the type of organizations and programs they are looking to support (Kimpton 2003, 23). The current situation is best analyzed by looking at the three sectors of giving independently.

Public support for nonprofit arts organizations comes from the federal, state, and local levels. Much of this support comes from the National Endowment for the Arts, which awards money to State Arts Agencies who then provide granting opportunities to arts organizations. Glenn Voss proposes that the reason behind government support of the arts is to create art and culture and to provide equal access to artistic opportunities. With this in mind, the NEA's major funding categories are: access and education, creation and presentation, heritage and preservation, and planning and stabilization (Voss, Cable, and Voss 2000, 334). Although much of the support comes in the form of money, providing research also gives organizations tools for advocacy. In the mid 1980s, the NEA sent out a survey and published "Toward Civilization: A Report on Arts Education." This revealed that a disproportionate number of public schools in high poverty areas did not provide arts education and urged the public to demand fair access (Bodilly, Augustine, and Zakaras 2008, 11). Similarly, the Department of Education's National Education Longitudinal Study showed that students with arts education outperformed students without arts education in every measured standard (Fiske 1999, xiii).

The state of today's government support for the arts is grim. At the FY2012 Legislative Session, the State Arts Agencies reported a drop in state support by 42% over the last ten years, which does not include a 39% reduction in federal appropriations. This drop is troublesome for the private philanthropists who use the funding choices of state arts agencies to indicate quality organizations and programs. An organization that does not receive funding could simply be the victim of budget cuts, which in no way represents the organization's repute. Since the decline in government spending is rooted in ideology as well as economics, grantmakers believe that this decrease in public funding will extend beyond the current financial downturn (Fransz and Sidgord 2011, 16).

The reduction in government spending in the arts has put pressure on foundations to increase their funding. Foundations generally support particular interests, in accordance with the wishes of the family or community in charge of the foundation (Voss, Cable, and Voss 2000, 332). In general, community and family foundations give a larger percentage of their funds than national foundations (Americans for the Arts 2007). Private funders became interested in giving money to local organizations to help children receive arts education in the 1970s. Some of the more prevalent foundations in this sector are the Annenberg Foundation, the Getty Center for Education in the Arts, the Ford Foundation, the William and Flora Hewlett Foundation, and the Wallace Foundation (Bodilly, Augustine, and Zakaras 2008, 22). In 2009, there were approximately 76,000 foundations offering grants, but this has dropped significantly. From 2008 to 2009 alone the largest foundations reduced their grants by over 14% (Lawrence and Mukai 2009, 3). Foundations have changed tactics, and Samuel Hope calls the new method "coercive philanthropy," in which foundations choose who and what to support based on their own needs, even if their requirements do not match the needs of the organization receiving the support (Constantino 2003, 30). Ken Robinson, the senior advisor to the president at the Getty Center, said that foundations have the responsibility to fund pilot projects and to explore new options in the field. One of the more complicated aspects of foundation giving is the challenge of donors balancing the short-term need to keep a program alive and the long term need for research, identifying best practices, and furthering the field (Constantino 2003, 30). Foundations are most useful because they have the ability to bring people and groups together to talk about problems, increase efficiency, and pool resources ("Supporting the Base" 2002, 10).

Corporations differ from foundations in that they have to be concerned with the impact of their funding on the company's reputation. "The Future of Private Sector Giving to the Arts in America" states that corporations have begun to pick organizations to fund based on the "four r's – reputation, recruiting, retention, and relationships" (Americans for the Arts 2006, 7). In "The Impact of Philanthropy on Arts Education Policy" Porter and Kramer called this method "context-focused giving" which describes how a corporation gives in areas that will aid the future of its business (Constantino 2003, 33). A less self-serving description describes corporate giving as having a "strategic focus" in which they want their money to be used where it will help the most people (Americans for the Arts 2006, 15). Corporate philanthropy did not begin until after WWII, when CEOs created programs meant solely to "give back." This was not a strategy to gain publicity, but rather the social responsibility of those who were profitable. Strategic philanthropy began in the 1980s, and McClimon describes it as matching the needs of the business with that of the community (McClimon 2004, 4). McClimon continues by saying that, most recently, a new trend of "corporate social responsibility" has taken hold, in which a company works to create an image of moral practice and outward caring for their customers (McClimon 2004, 7).

Despite a shift in corporate giving focus, "The Future of Private Sector Giving to the Arts in America" found that corporate giving dropped 65% in the first five years of the century. This reduction occurred mostly within the larger corporations (Americans for the Arts 2006, 7). However, Grantmakers in the Arts found that 22% of arts grants come from corporate giving (Lawrence and Mukai 2009, 4). The 2006 American for the Arts National Policy Roundtable reported that a major focus for the private sector is helping children prepare for the 21st century (Americans for the Arts 2006, 9). The list of 21st century skills includes creativity and strategic problem solving, skills that lend themselves to arts education. Regardless of the specific focus, corporations are approaching organizations with explicit projects and guidelines in mind, an action that is frowned upon by the creative artistic sector that needs to focus on its mission. However, corporations know that if their money is wasted, bad publicity will arrive quickly, much faster than quality programming brings good publicity (Kimpton 1993, 23). With this in mind, most corporations are supporting local organizations because they are easier to monitor and directly help the business' customers and employees (Kimpton 1993, 24).

The Impact of the Nonprofit Funding Systems on Arts Education

The multi-faceted complexity of the nonprofit funding system greatly influences the funding of arts education. This impact has grown exponentially in the troubling economic times. Grantmakers in the Arts reported that arts funding declined 21% in the year 2008-2009. Overall giving also declined, but the only areas where funding grew were in education and public affairs.

In fact, giving to education grew 2.9% that year (Lawrence and Mukai 2009, 4). In addition, Voss notes it is hard for many business-oriented people to understand the concept of valuing artistic product more than financial gain. The act of education, however, is much easier to understand because community outreach has more of a charity connotation than the harder to grasp concept of creating art (Voss, Cable, and Voss 2000, 331). Many foundations have altered what they fund in an organization, including increased support of arts education. Additionally, corporations feel that funding educational programs in an arts organization is much safer than giving money to create an artistic product over which they have no control (Riddle 1993, 26). Grantmakers in the Arts found that even state arts agencies place arts education as one of their highest priorities, second only to general operations (Katz 2011, 13).

When looking at new arts education programs, it is interesting to note how many were initiated by donations. For example, in 2005 the Wallace Foundation approached the New York City Department of Education with a request for proposal to help establish a coordinated system of arts learning both in and out of school. After the NYC Department of Education received the grant, they hired arts specialists, increased professional development, and even created "The Blueprint" a document of sequential arts curricula. The Wallace Foundation not only established the program, but also held it together for two years. In April of 2007, however, the school chancellor decided to give principals more autonomy to organize and determine the curriculum. The Project Arts funding was rolled into a larger fund, which might not be used specifically for arts (Bodilly, Augustine, and Zakaras 2008, 45). Perhaps if the Wallace Foundation had secured more stringent guidelines, the project would still be thriving today.

A similar example of arts programming being directly impacted by funders was described at the International Council of Fine Arts Deans Symposium on Philanthropy. In this scenario, The School of Visual Arts at the University of North Texas was approached and funded by the Getty Foundation to bring arts education into public schools. When the initial funding ended, the University asked the Annenberg foundation to take over. The University was then able to use the large foundation's grants as leverage to get support from smaller, local foundations ("Supporting the Base" 2002, 4). Although these examples are not specifically theatre organizations, they provide clearly defined instances of a foundation leading and closely monitoring educational programming in the arts.

Arts organizations understand that they must take part in educational programming to receive grants from foundations or corporate sponsorships. Concerns arise when the theatre company's monetary needs define what types of educational programs are offered (Ross 2003, 74). Glen Voss worries that theatres will alter their values according to how and where they get their resources. In the extreme, companies might actually change their products, their programs, and even the mission (Voss, Cable, and Voss 2000, 344). April Riddle agrees, saying, "increasingly, corporations are focusing their interest on supporting arts education programs, sometimes to the detriment of important artistic work" (Riddle 1993, 26). She continues by asking, "How do you educate responsibility and work toward the development of in-depth programs that have lasting value and, at the same time, continue to pursue the artistic work at the core of their mission?" (Riddle 1993, 28) Many leaders in the field are worried that the current economic situation and funding system will impact not only the quality and type of educational programs offered, but also upset the dynamics between the education departments and their larger organizations.

Findings from Theatre Communication Group's Education Survey

With the uncertain future of arts education funding, a study of nonprofit theatres, their education departments, and the monetary relationships between the two, is needed. Some information can be gleaned from the Theatre Communication Groups annual education survey. Since 1999, member theatres of TCG have been asked to complete a questionnaire about their education departments. Although data exists about the past thirteen years, the document changed significantly in 2002 and it is challenging to compare the current data with the preceding surveys. The survey questions revolve around the education departments' type of programming, staff, audience, and finances. The theatre organizations are divided into six groups based on their annual budgets. The analysis below looks at the four largest groups with budgets over one million dollars. The number of respondent theatres falls between 94 and 123 with the smallest respondent pool being six organizations. TCG makes the results available through an online database, however only the minimum, maximum, and average responses are shown to the general public. Additionally, two years ago, the organization aligned the educational survey with another fiscal survey to ensure reliability of the answers. The following information was gleaned using data from the publications from Centerpiece Magazines from 2000-2010 (Renner 2003, 2004, 2005, 2006 and Baskin 2007, 2008, 2009, 2010, 2011).

The best indicator of the health of theatre education departments lies in the financial information provided in these surveys. Eight sequential years of revenue and expense amounts have great potential to show trends and reveal the status of the sector. The data reveals a general decline in education departments' earned income from 2003-2004 to 2009-2010. Contributed income is divided according to the specific source and is compared to that of the entire organization. Generally, less than ten percent of individual giving goes to education, with many years showing less than five percent. Foundations fare slightly better with around ten to twenty percent going to education. Corporations top both individual and foundation giving in that twenty to thirty percent goes to educational programming. Additionally, the data about corporations shows an overall drop in giving since the 2002-2003 year; however, in 2009-2010 meager gains appear again. The federal government gives the highest percentage of its funding to educational programming, usually between fifty to sixty percent. This does not include grants from the NEA and the Department of Education, which go directly to educational programming but are inconsistent in amounts. State government percentages are also challenging to predict, with between ten to ninety-four percent going to education departments. Local government is slightly more stable with between three to thirty-six percent allocated to education.

Information about expenses is also included in the report. Some of the most useful information lies in the data that depicts the percentage of organizational expenses allocated to the education departments. According to the surveys, theatre companies show a decline in spending in their education departments since 2000. All financial groups have allocated less than five percent their total budget to the education departments in the last few years. Interestingly, the smaller companies tend to spend a higher percentage of their money on education programs than the larger companies. In 2000, the smaller organizations spent more than double the percentage of their expenses than the larger organizations. This could indicate that in times of financial stability, small organizations spend more of their money on educational programs than do large organizations.

Although the Theatre Communication Group's education survey gives a good amount of useful data to arts managers, some inconsistencies reveal the limits of the information. First, only theatres that are members of TCG are given the opportunity to take the survey. Many organizations respond annually, but there is significant variation in which theatres take part each year. Due to the sensitive nature of financial information, the actual published data is only averages and ranges. This probably results in a higher return rate, however it is much easier for a small amount of data to skew the results. For example, Group VI is recorded as receiving 2.8% of their individual donations specifically for education in 2004, 12% in 2005, and then 2.3% in 2006. Since there is no access to the pure data, it is impossible to tell why this significant jump occurred. There is also questionable data when comparing the different financial groups. In 2004 to 2005, the education departments in groups III, IV, and V all experienced a significant drop in earned income. In that same year, however, group VI almost doubled its income. The limits of the use of averages are revealed in the data about revenue from the federal government when, three separate times, the data shows that over 100% of the income was given to education departments. With only the information provided, there is no way of knowing how this occurred. Finally, it is hard to gauge the health of the education department as opposed to the health of the entire theatre organization when one cannot match the statistics specifically. If it were possible to partner the theatre's information with its education department's information, the outliers that are skewing the data could be identified and explained. TCG's education survey provides a plethora of good information, but the data brings up just as many questions as answers.

Education departments in nonprofit theatres provide valuable services that continually prove their positive impact. The programs vary in type and purpose, and they are valued differently in each organization. However, the rise and fall of the economy, coupled with the complicated nonprofit arts funding system, place education departments in precarious positions. Gordan Davidson writes that "a theatre has both a community and an artistic responsibility" ("Supporting the Base" 2002, 3). The lack of consistent, reliable data on the relationship between these responsibilities could place undue pressure on education departments to bring in more funds; or alternatively, the financial impact of educational programming could be overlooked. Kenneth Robinson is quoted as saying “In my view, institutions don’t need an education policy and an arts policy, what they need is a cultural policy, a way of expressing the artistic aspirations of the organizations and ways of engaging people in them. In the more mature organizations, education is seen as co-equal, at managerial levels and in terms of funding.” (“Supporting the Base” 2002, 6). The words of Robinson, however ideal, will not become reality until additional examination occurs. It is this researcher’s intention to begin that process.

CHAPTER 3

METHODOLOGY

After studying the available publications regarding education departments in nonprofit theatres and the resources available for these programs, the research shifted to an internal view of these departments. The study took a qualitative methodological approach as defined by John Creswell. This type of study "honors an inductive style, a focus on individual meaning, and the importance of rendering the complexity of a situation" (Creswell 2009, 4). The information gathered was used to create narratives of selected programs, which are then likened to the state of the field as a whole. This study involved multiple steps, which are outlined below.

First, the sample size was determined. The study focused on organizations in the D.C. Metro Area so the researcher could conduct as many on-site, in-person interviews as possible. This region provided a diverse array of organizations within both urban and suburban communities. Five nonprofit theatre organizations were chosen, all of which are producing organizations that have education departments with at least one full time staff member. The theatres are midsize or large organizations with annual budgets of at least five million dollars. Throughout the process, the theatres provided detailed organizational information, including budget specifics, so the study does not reveal the names of the participating organizations.

Next, the study gathered publicly available information about the five organizations. This included a detailed look at organizational websites, including mission statements and organizational history, annual reports, and program descriptions. Additionally, tax forms and 990 forms were examined from the past five fiscal years. These documents gave information about overall revenue and expenses; however most organizations did not publicly document financial information from their education departments.

After examining the information that was publicly available, the research continued with interviews. The education directors from each organization spoke with the researcher. The discussions were based on ten questions, which can be found in Appendix A. These questions asked about the purpose and mission of the education department, its relationship with the other departments within the organization, and the allocation of funds. All of the education directors were willing participants who were eager to share their stories. The 100% response rate, from both struggling departments and ones who viewed themselves as successful, revealed a common concern about the future of the field of educational theatre.

Finally, the researcher sent a questionnaire to each education director asking about specific financial information from the past five years. The document can be found in Appendix B. All of the departments worked hard to complete and return the form, but only one director was able to fill out the form in its entirety. Most of the organizations had to ask for assistance from other departments, usually the development department, and did not have access to these numbers on their own. The relative challenge of all but one organization in returning the completed document is analyzed in chapter seven.

After compiling information from websites, financial documents, interviews, and questionnaires, the researcher began to analyze the data. Direct comparisons between the organizations allowed the researcher to find commonalities and similar struggles. These shared conditions were used to create a system of analysis in the form of five indicators of success. Subsequently, each indicator was studied through the lens of the analysis and was rated as basic, emergent, favorable, or advanced on each indicator. By creating a common language, the unique organizations were compared and contrasted, and were provided with an assessment of current and future health. The researcher used the practices of the more successful departments in specific areas to give recommendations to other education departments.

The final step of this study brought together the status of each education department within its organization to evaluate the state of the field as a whole. Although the small sample size made it difficult to make definitive statements, the study did emphasize developing trends and provide a basis for comparisons. By giving suggestions to each education department, this research hopes to provide insight to other organizations facing similar challenges, and thus improve the condition of the field as a whole.

As stated above, the analysis centered on five specific traits exhibited in education departments. These traits, or indicators, are described in the next chapter.

CHAPTER 4

INDICATORS OF SUCCESS

This chapter presents and analyzes five indicators of success for education departments, drawn from interviews conducted for this study. Education departments within large producing theatres regularly face challenges that threaten their future and stability. The best way to ensure department survival is the maintenance of positive relationships within the organization. If the education department is in good standing inside the organization, it is less likely that education programs will be cut when the company faces difficult decisions. As part of this study, interviews conducted with five education directors in the D.C. Metro Area revealed common circumstances and practices. Generally, if the education department rated positively on five indicators, the organization viewed these programs as essential to the success of the theatre as a whole. The indicators, although independent of each other, create a well-knit safety net that reveals not only the health of the department in the present, but points toward resilience for future challenges. If an education department strives for positive ratings on all five indicators it is more likely to flourish in the present, but more importantly, to survive in the future. The indicators of a healthy education department include (1) a solid foundation behind the creation of the department, (2) a dynamic education director who works to create connections and advocates within the organization, (3) a clear understanding of the education department's role in initiating contributed income, (4) an ability to bring in earned income, and (5) a significant place in the future plans of the organization with solid data to support this position.

Solid Departmental Foundation

In most endeavors, the beginning reveals the intent. Each education department has a unique story behind its origin and this story gives an inside view as to what purpose the programming was designed to fill. Even if the department began decades before and the founding staff moved on years ago, the original intent has an underlying impact on current programs. Unfortunately, departments cannot change their origins, and thus, they need to embrace their founding principles or overcome them. By studying various departments, four general reasons for creation emerged. These include the work of a specific project or person, a grant or money opportunity as the initiating action, being part of the organization's original mission, and finally, as a result of a new value propositioning movement. Although some are more desirable than others, each reason has both positive and negative impacts for the department.

One of the most common reasons for founding an education department stems from the desires or requirements of a single person or program. Sometimes the founding members of an organization have a passion for children or education and their individual interests spur the creation of programs. Other times, a specific program, which in a theatre normally consists of a single production, calls for educational components. These small endeavors eventually expand to create an entire department. A positive result of this type of origin is that the department stems from an organic process that generally means more productive and higher quality programs. Sometimes this process leads, however, to an education department that is not well integrated into the rest of the theatre organization. The original program or individual generally allows the department to evolve, and perhaps even flourish independently of the organization as a whole. This is troublesome when the theatre begins to view the department as an outside entity, not vital to the organization or its future.

A less appealing department instigator, though just as common, is a specific grant opportunity or request for proposal. As stated in the review of the literature, foundations and corporations began to give significant funding to arts education programs in the 1970s, which in turn led to a rise in these programs (Bodilly, Augustine, and Zakaras 2008, 22). Like any smart business, many nonprofit organizations adjusted their work to receive this funding, and education departments were born. Most education directors are hesitant to admit this as the driving force behind their department's creation, but it is solid business practice to create products that will sell, or in this case, be funded. It is important to note that creating a program based on monetary gain does not necessarily reveal that program's quality. Origin does, however, impact the place these programs hold within the organization's psyche. If programming is seen as a way to bring in money, in this case contributed income, it could be seen as an important source of financial stability and would by highly regarded by managing directors. The programming could, however, be seen as a way to please donors and not part of the organization's mission. If the education department is thought of as "mission drift," the department could be at a precarious position when the funding dries up. In fact, any program created to fit into a funder's guidelines would be in jeopardy when that funder moves on to another organization. A shift in funding trends is one of the biggest obstacles education departments face today, and the programs that were initiated because of previous funding changes hold the most uncertainty.

The third practice for creating a department gives a little more security for the education programming. This occurs when the organization includes education as a part of its mission. Being part of the original mission written with the founding of the organization is preferable in that the education department shares a common history with the company as a whole. Inclusion in a new mission statement, written as a result of a new strategic planning process, is slightly less desirable in that the education department was created years after the organization and therefore has less stature than the main programming. Being part of the mission statement, no matter when it was included, means that education is seen as an essential part of the organization, which asserts that some type of education programming, regardless of the amount, will always exist. The only major pitfall could be the reasoning behind the initial inclusion in the mission. Were education programs forced onto the organization because similar organizations were beginning to include education into their missions? If this were the case, the department could be struggling to find its purpose and place within the organization. As an alternative, the new mission statement could have been written as a result of the needs of the community and the department would therefore have a specific and important role to fill.

The final reason for founding an education department is the most beneficial for the future of the programming because it is a result of a specific need. If an organization goes through a value propositioning process and views education as a unique part of its brand, that which sets it apart from its competitors, this department holds an integral place in the organization. In this case, educational programming is seen as essential to the company and the organization would not survive without its education component. The organization regards education as a top priority, and only a complete dissolution of the company would be a threat to the education department. The only downside to this option would be if the high value placed in education were due to monetary gains instead of organizational identity. In this case, if other programs become more lucrative, the education department might face trouble, much like departments created to appease funders.

It might seem retroactive to look at the reasons education departments were created. It is true that this is not an actionable indicator, as departments cannot change their origins. At the same time, a solid foundation does not ensure that the building will survive for decades. Education departments with seemingly stable foundations could still be annihilated by their parent theatre organizations. However, looking at the basis behind a department's creation gives stakeholders a unique look into the mind of its founders. Revealing the department's past provides the language needed to advocate for its future.

Connective Education Director

An education director who is both an advocate for the department and an ally to the organization as a whole is one of the most important indicators for a healthy education department. A talented director gives the department legitimacy, which leads to a higher status level within the organization. If the education director holds respect, so does her department. Daniel Renner, Director of Education for Theatre Development Fund, said that good education directors must step out and be champions for their departments. They have to sit in meetings and connect the dots, and most of all, they have to stop deferring to their superiors who do not have education programming in their best interests. Basically, this "ain't a business for shy violets," (Renner 2013). Education directors must have business savvy and administrative training while still keeping a passion for arts education. They can no longer be teaching artists who have climbed the ranks, but must have as much talent and experience as the organization's executive director. Although the base abilities of the education director are very important, the most vital quality is the director's ability to connect with the rest of the organization. From the interviews conducted in this research study, two types of education directors emerged: those who were focused solely on their department and those who were focused on the connections between their department and the rest of the organization.

The education directors who focused solely on their departments exhibited an extreme passion for their programming, but did not view their work in context with the organization as a whole. These directors attended meetings with the marketing or development department but did not view these relationships as essential to their jobs. Commonly, this type of director viewed each department as a separate entity and did not understand their roles and responsibilities. These education directors may be detrimental to the survival of the education department simply because they are not aware of the pulse of the organization. They are more likely to be blindsided by budget or program cuts and have a tendency to place blame on other departments.

On the opposite end of the spectrum, well-connected education directors view the many departments as part of a team and were able to describe their inner workings and requirements. To keep up-to-date, these directors met regularly with other departments and worked to improve relationships by accepting constructive criticism based on reaching deadlines, planning ahead, and allocating resources. Most importantly, these directors understood the tasks related to education programming, even if they were taking place inside other departments. Without micromanaging, these directors knew the status of marketing materials, relationships with foundations, and cashflow. Well-connected directors worked regularly with other departments, but did not abdicate duties related to their departments. Instead, these directors collaborated with different staff members to ensure tasks were completed in a professional, timely, and creative manner.

Based on the interviews conducted for this research, a connective advocate is preferred in the position of director of education. This is challenging, however, when these directors retire or take positions with other organizations. If a department succeeds because of a high quality director, then it will fail when it hires a poor one. What is more, it is challenging to predict the connective abilities of an applicant vying for the position. Despite the challenges in obtaining and retaining such a leader, an education director who is able to advocate for her programming and connect with other departments should be recruited tirelessly. It is also important to develop the skills of an education director to connect with other departments and be an advocate for their own department.

Initiator of Contributed Income

The presence of a connective leader is directly related to the ability of an education department to form a symbiotic relationship with the organization's development department. In most nonprofit theatre organizations, the development department is the driving force behind contributed income. In order to obtain and preserve a solid standing in the organization, the education department needs to complement the development department and bring in contributed income on its own. By finding quality grant opportunities and working to form personal relationships between granting organizations, the education department becomes an asset in attracting donations. Most education departments do work with development to write grant applications, but the education staff members need to become an integral and irreplaceable part of the process. From the interview conducted, education departments were either followers, or initiators in securing contributed income.

In education departments that were followers, the education staff's relationship with the development department was a passive one wherein the development staff identified possible grants and asked education to write only specific sections. The development department then received the credit for the grants, and the role of education in obtaining the grants was not acknowledged. What is more, the education director interviewed could not identify that role either. Relationships with individual donors were discussed in similar terms. It was common for education directors to take prominent donors on tours or to observe programs. It was not customary, however, for the education director to maintain relationships with these donors and to make contact without encouragement from development staff. With both individual and foundational giving, this type of education department simply follows prescribed directions and thus receives little credit for bringing in funding.

Education departments that initiated the process of receiving contributed income were able to identify granting opportunities and bring them to the attention of the development department. By advocating to foundations, these education departments were able to promote themselves within the organization as well, and garner general operating support in addition to the restricted funding provided by the grants. The education directors were also able to form close relationships with both grant officers and individual donors. By keeping stakeholders informed and involved, at a higher level than the development department had time for, these education directors saw themselves as a vital link in the donor relationship.

Bringing new sources of contributed income to the table is certainly a valuable asset to any department within an organization. An education department that initiates contributed income has more control over the amount of money flowing into programs and does not simply leave this responsibility to another department. It is important, however, that this department does not step on the toes of the development staff. An education director can be seen as an active member of the development team without taking over the entire department. Continuous communication between departments is key so donors are not bombarded with similar requests. To avoid confusion, the department that initiates contributed income should also be well connected with the rest of the organization. The purpose of working directly with donors is to raise the value of the education department, not to confuse or nullify the development team. Instead of simply following directions to please donors or complete grants, a successful education department advocates for itself and does not leave the gathering of funds solely to development.

Plan for Earning Income

Just as an education department has the ability to receive contributed income, it can also earn income from its programs. Most organizations provide classes or camps that require students to pay tuition or fees. Many of these programs offer scholarships to students who could not afford to attend otherwise. Other programs that concentrate on community outreach and access do not lend themselves to making money. In general, the types of programs designed to create future artists are the ones that become the most lucrative for education departments. Although financial gain is never the primary goal, education departments usually take one of two strategies: the first strategy views tuition as a secondary benefit for offering these programs, while the second strategy sees the income as a valuable tool for increasing the program's quality and longevity.

The education department that largely dismisses earned income is probably the most common. From the interviews conducted in this study, the majority of directors worried that creating a program that pays for itself would undermine the quality and the integrity of the work. Education directors who saw earned income as a low priority described with pride how their managing directors understood that education programs are not designed to make money and thus they themselves did not have to worry about earning income from their programs. This might seem like an ideal environment for an education department, but it instills a false sense of security. What will happen when a new managing director arrives or if the organization faces financial constraints? Current attitudes should not be the sole reasoning behind today's practices for fear of what tomorrow will bring.

The education department that values the ability of some programming to earn income is better prepared for the uncertain future. Anita Maynard-Losh, the Director of Community Engagement at Arena Stage, explained her position on earned income when she stated, "I believe in having the noble goal, but the byproduct of the goal could be making money. We want to continue giving programming to people who can't afford it, but many people can afford it and those people can pay the fees" (Maynard-Losh 2013). This education director still values access for all community members, but does not discount a program's ability to become self-sustaining. In fact, she understands how making money not only protects the program, but changes the departmental relationships inside the organization. She states, "Charging tuition inadvertently helped people realize that what we do is valuable. What we do has real value. Frankly, bringing in income can inspire respect" (Maynard-Losh 2013).

Many nonprofit organizations still struggle under the assumptions that they are not allowed to make money. Education departments are struggling to deal with this misunderstanding. Some departments are trying to alter their business models, but a supportive executive director can lull a department into a false sense of security. In order to ensure a healthy standing within the organization, education departments need to embrace the moneymaking abilities of some programs. Making money does not have to be the top priority, but it should be acknowledged as a valuable attribute and an astute business practice.

Data and Integration into Future Plans

The ability of an organization to survive through organizational success and strife extends beyond its capacity to make money. The final indicator of success lies in the department's ability to integrate itself into the long term planning of the theatre organization. Samantha Wyer, Director of Education at Shakespeare Theatre Company, stated that directors have to "synthesize the education department into the artistic vision of the theatre" (Wyer 2013). This could be extended a step further to say that the department should be integrated into the theatre's business plan as well. If educational programming is included in any strategic or business plans, then it is seen as an important part of the organization's future and thus has more security. Additionally, many organizations are embracing the use of evaluation and assessment tools, usually spurred on by information required by foundations. Education departments should include such quantitative and qualitative analysis, not only to assess the abilities of the programs to impact constituents, but also to help the organization.

In the interviews conducted for this study, education departments were either taking part in data analysis for internal use or were leveraging data to advocate for their programs. The use of internal data analysis shows that the department cares about utilizing good business practices and efficiency. If a department is able to think critically about its practices, it will be more likely to be proactive to any adjustments an organization needs to survive. This raises the status of the department within the organization. In order to be effective, the department must not only complete this analysis, but communicate the results to the organization using shared language and illustrating how the department contributes to the organization's success over time.

Gathering data has become much more prevalent in nonprofit theatres, but much of the data is collected through the development department to fulfill grant requirements. Education departments do not need to fully take over this process, but should have access to the information and regularly refer to the statistics to advocate within the organization. An education director who is able to quote the exact number of tickets sold in relation to last season's sales exhibits the qualities of a good manager and is more likely to be seen as an asset to the organization. Once again, knowledge and communication arise as important factors of a healthy education department.

The previous indicators cannot singlehandedly predict the security of an education department within a nonprofit theatre organization. Many outside factors combine to create an uncertain future. However, the original intent of an education department, the ability of its director to communicate inside the organization, the aptitude to bring in contributed and earned income, and the propensity to successfully use data to prepare for the future, all combine to give the department more leverage. Education directors can use these factors to assess the stability of the department and discover areas in which improvement is needed. The following analysis goes through this process with five education departments within mid-size producing theatres in the D.C. Metro Area.

CHAPTER 5

SYSTEM OF ANALYSIS

Although every education department works hard to provide consistent programming over time, some are better equipped for longevity. In this study, five theatre education departments in the DC Metro Area were analyzed using the indicators described in the previous chapter. Information was drawn from interviews, budget information including 990 forms, and organizational websites. Using this data, each department is given a descriptor. Next, each descriptor is given a rating based on the positive or negative effects on the department. The ratings are linear and are categorized both verbally and numerically. Figure 1. below illustrates the process for the department’s foundation. Assigning ratings for each descriptor is straightforward for this indicator because the number of descriptors aligns with the amount of rating levels.

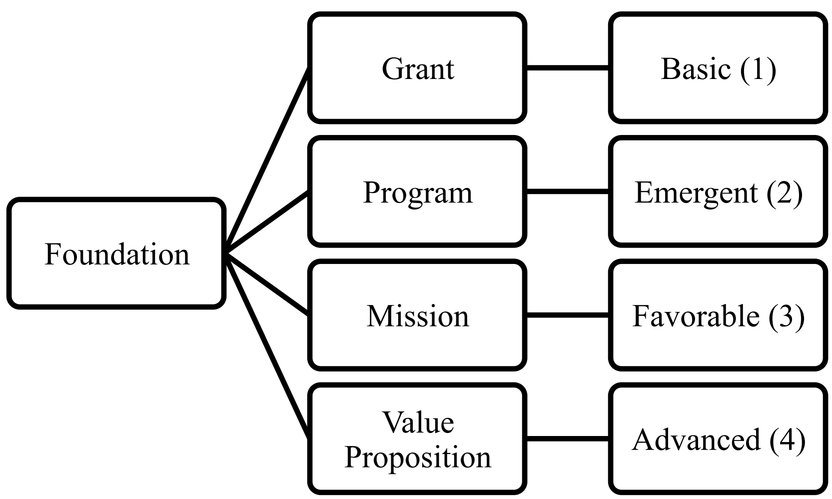

Figure 2. Categorization of Foundation Indicator

The other indicators are more challenging and take more of a detailed analysis. Figure 2. shows that the education director has only two descriptors, which have to be divided into four levels. If a department centric director speaks about beginning to reach out to other departments, he is given an emergent rating while one who does not recognize the lack of communication is given a basic rating. Similarly, a connective director who practices consistent communication is given a favorable rating, while one who actively seeks out and engages other departments is given an advanced rating.

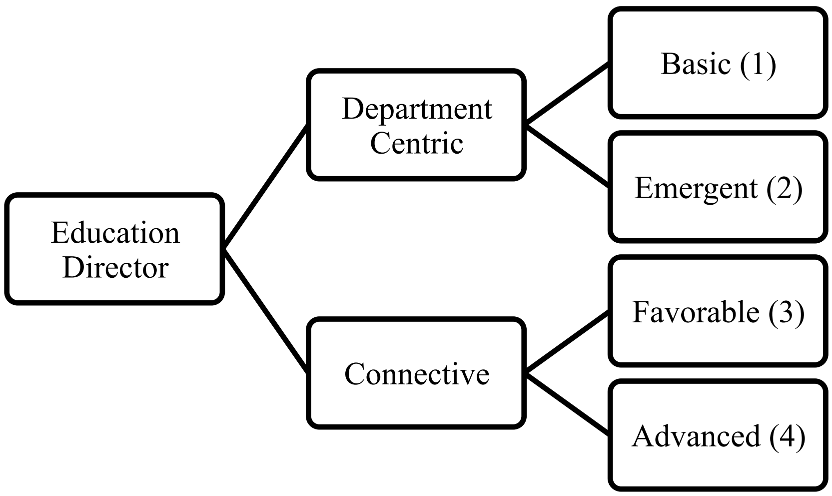

Figure 3. Categorization of Education Director Indicator

This system continues with both contributed and earned income. If the department has little information about the origin of money flowing into the programs, it is given a basic rating. Emergent ratings are assigned to the departments who only follow the directions of the development department or use their executive director's understanding as an excuse for low revenues. A department that initiates contributed income or views earned revenue as a responsible business goal receives either a favorable or advanced rating. Advanced departments are self-sustaining, or close to it, and favorable departments are using program abilities to their full extent.

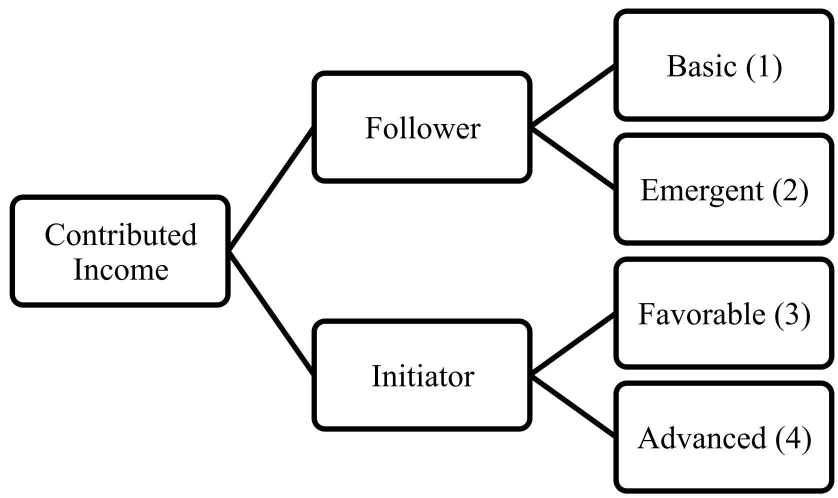

Figure 4. Categorization of Contributed Income Indicator

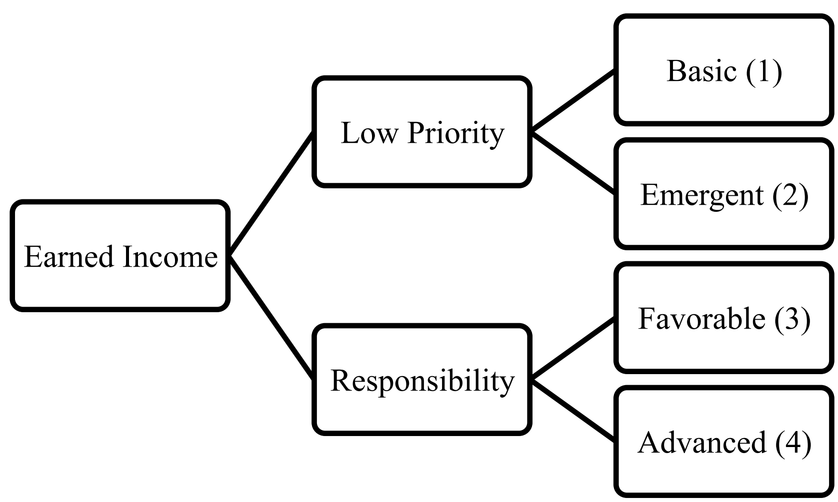

Figure 5. Categorization of Earned Income Indicator

The last indicator also features the one descriptor to two ratings ratio. A department that does not collect data or does so only in the guidance of the development department receives a basic rating, while a department that collects the data and retains copies for its own analysis receives an emergent rating. A department that not only collects data but also uses these numbers to advocate within the organization for current programs receives a favorable rating. Finally, a department that is able to analyze data to such an extent that it proves its ability to follow best business practices and make informed financial decisions on its own, receives an advanced rating.

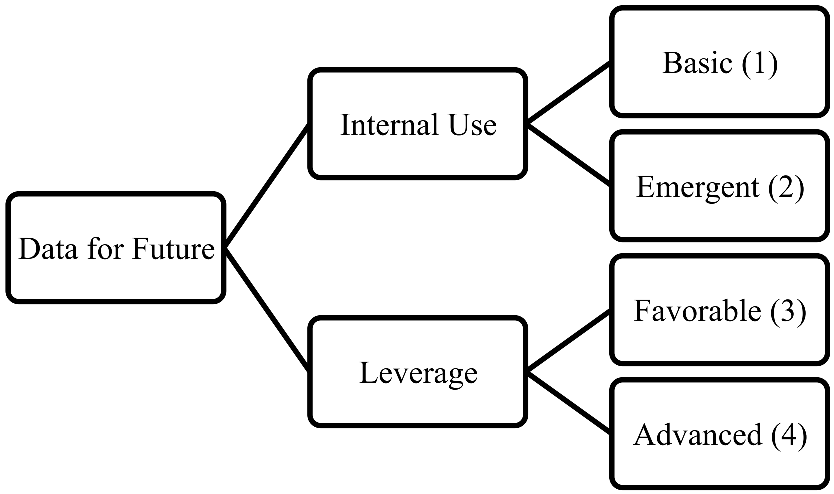

Figure 6. Categorization of Data for Future Indicator

This system of indicators, descriptors, ratings, and numerical values provides a common language to analyze extremely unique departments and situations. The indicators are not weighted, although theatres could certainly do so if they felt some indicators were more important than others. This structure allows for comparison in the hopes that education directors will be able to situate their practices among that of their colleagues. To do this, each theatre must first be analyzed separately.

CHAPTER 6

THEATRE ANALYSIS

The five indicators and the system of analyzing these traits derived from the interviews with the education directors. These tools were then put to use through the examination of each education department and its status within its parent theatre organization. These theatres are all located within the DC Metro Area, including the District of Columbia, Northern Virginia, and the city of Baltimore. The theatres all fit into the parameters set for this study, including a budget of more than $5 million, a designated education department with at least one full time staff member, and a mission to produce theatrical work. By ensuring the anonymity of the theatres and staff members involved, the research allowed for more candid discussions. An individual report for each theatre follows.

Theatre A

Theatre A has high quality programming with over twenty years of history. However, the education director is new and is still learning how to manage the position. Since many of the indicators of a healthy relationship with the organization are directly related to the education director, this theatre's score is low. The following analysis should give the new director a good place to focus as the responsibilities become clearer.

This education department was founded due to a large granting opportunity. Although a few small programs had begun to form prior to receiving the money, the education director recognized that nothing was formalized until the grant money arrived. This places the department in a precarious situation as arts education grants decline. For this reason, the foundation indicator is basic. It is not surprising that the new education director is not yet connected within the organization, however this could already be an area of improvement. The education director spoke about wanting to create closer connections with the production department by sharing designers, interns, and other artists. This is only beginning with one department however, so the connectivity is placed at an emergent level. During the transition period, the development department has taken control of all contributed income sources and the education staff fills in basic programming information. This places initiating contributed income at a basic level. Earned income does not fare much better due to low tuition rates and a large number of scholarships. For this reason, earned income is not a high priority and is at a basic level. Finally, this education department uses lots of data through evaluations and comment cards. However, there is no evidence that the information is used to ensure the longevity of the programming. Instead, the data is collected at the request of current funders. Theatre A's use of data as leverage is at an emergent level.

Figure 1 below illustrates the levels of all five indicators for Theatre A. By giving each level a numerical value, the department receives a rating of seven. This education department exhibits quality programs, but its present transition gives it an unsteady future. Although the department is not currently facing extreme budget or program cuts, it is vulnerable to any such occurrences. Moving forward, it is advisable that the new education director works to increase department knowledge of contributed and earned income. This awareness can then be translated to a more hands-on approach in securing both contributed funding and earned income. Theatre A has great potential with a new education director who is dedicated and has the ability to quickly learn the skills needed.

Table 1. Theatre A Analysis

Indicator	Descriptor	Level	Numerical Value
Foundation	Grant	Basic	1
Education Director	Department Centric	Emergent	2
Contributed Income	Follower	Basic	1
Earned Income	Low priority	Basic	1
Data for Future	Internal use	Emergent	2
		Total:	7

Theatre B

The second theatre in this study also has a newly acquired education director. This director has a slight advantage because of a few practices already in place, mostly related to the use of data to secure a solid future. Even before the new education director took over, the department looked at data gleaned from ticket sales, feedback forms, and artists themselves. The director was able to talk about how many former students from education programs returned as audience members, volunteers, or employees. Since the development department records most of the information, however, the use of data is only given a favorable rating. The department itself was created as a direct result of a specific program. This means the department was organically formed by a need from the community, but it also points to a lack of stability in the future. The program-based foundation receives an emergent rating. Similar to Theatre A, Theatre B's new education director has a low level of connectivity with a rating of basic. The education director spoke of weekly meetings with the managing director and bi-weekly meetings with marketing staff, but there seems to be little interaction between most other departments.

This theatre's income, of both the contributed and earned variety, is not seen as a direct responsibility of the education department. The education director acknowledged the need to leverage the programs that do bring in some income, which gives the theatre an "emergent" rating for earned income and a "basic" rating for spurring on contributed income. Using the same numerical value system and adding the numbers together, Theatre B receives a rating of nine.

Theatre B seems to be in a positive place considering the experience of the young education director. This leader must continue to build relationships with other departments, connections that extend past set meeting times. Next the director should take more initiative in securing contributed income and work to maximize the abilities of certain programs to earn money. With a new effort to secure funds, the director should continue to use data to show growth. This information could, in turn, raise awareness of the department within the organization and give the director more respect and influence. The education department in Theatre B needs to professionalize most of its indicators, but its ability to track these changes can only improve its future standing within the organization.

Table 2. Theatre B Analysis

Indicator	Descriptor	Level	Numerical Value
Foundation	Program	Emergent	2
Education Director	Department Centric	Basic	1
Contributed Income	Follower	Basic	1
Earned Income	Low priority	Emergent	2
Data for Future	Leverage	Favorable	3
		Total:	9

Theatre C

Although Theatre C has been producing work for over forty years, it recently went through a re-branding and strategic planning process, which drastically changed its focus. Now the theatre considers education programs a primary service. Theatre C decided that its educational programming is one of its greatest assets and a large part of the organization's successful future. This gives the education department added security and places its foundation at an advanced level. As the education director adjusts to a new status, there needs to be a higher level of communication between other departments. The education director recognizes that more communication needs to occur saying, "I get enormous support institutionally. If I were to adjust any aspect it would be to help the other departments understand what I do. I need to spend time getting employees in development, marketing, and communications to understand how to best support our programs. We are a theatre, but we don't exist solely to support productions." The low level of communication, combined with the new attempts to increase interactions, places the education director at an emergent level.

This education department has a much higher percentage of contributed income compared to earned income, which is reflected in a favorable level for initiating contributed money and a basic level for attempting to earn income. The education director spoke of finding and writing numerous grants when the education department began to grow. The director is not as closely aligned with securing contributions as before, which could easily be a result of a more dedicated development department. The programs provided by Theatre C do not lend themselves to income from tuition or fees, and the education director accepts this as a result of the theatre's focused mission. Any director, however, should always be looking for ways to become more self-sustaining as a means to protect all programs.

Finally, this theatre is just beginning to use data collection and analysis. The newly structured department has only recently been able to collect summative information and it remains to be seen as to how the information will be utilized to elevate the department. For this reason, the use of data is categorized at the basic level. Overall, Theatre C has a solid foundation that provides security and an education director who is skilled at initiating contributed income. To provide additional stability, the director should work to build connections with other departments, study the earned income model, and incorporate collected data when promoting the education department within the organization.

Table 3. Theatre C Analysis

Indicator	Descriptor	Level	Numerical Value
Foundation	Value Propositioning	Advanced	4
Education Director	Department Centric	Emergent	2
Contributed Income	Initiator	Favorable	3
Earned Income	Low priority	Basic	1
Data for Future	Internal use	Basic	1
		Total:	11

Theatre D

The fourth theatre has an experienced education director and a long history of quality programming. The beginnings of the department, however, made a solid relationship between the organization and the education team very hard to obtain. This department was created as a single program at the same time as the theatre organization. One individual ran the program and for all intents and purposes, the education department was an organization in itself. For this reason, the department's foundation has an emergent rating. The current education director, however, has mended many of the original rifts between the education department and the company. The director spoke of this process saying,

> "When I first arrived, I set up meetings with the senior staff. I asked them; 'What should I know?' and 'What would you like to be different about your relationship with the education department?' I wanted to build strong relationships with the leaders of other departments. I was lucky in that I had worked in a smaller organization and I had experience working with these different jobs and respect for the work of other departments."

The education director's ability to adeptly connect with other departments gives this theatre an advanced rating.

The education director of Theatre D also works hard to ensure that programs capable of making money do so. In fact, two of the education programs pay for themselves entirely through earned income. For this reason, this department's ability to utilize earned income is ranked as advanced. The department also receives substantial contributed income, however, most of the donations are initiated through the development department. The director helps write program information and brings donors on tours, but the department does not receive the recognition for this work because it is facilitated solely by development staff. The director understands the importance of linking donors to specific programs and states, "[Program name] is a very beautiful model and the development department saw that bringing donors to [Program name] opened checkbooks." Finally, Theatre D is working to use data as a leveraging tool for the future. By placing its programs as a standard date on future production calendars and using past numbers to predict future interest, the education department is able to insert itself into the theatre's everyday planning process. This gives the use of data for the future a favorable rating.

Theatre D is thriving with a well-connected education director who has found a way for some programs to earn significant income. If the same wherewithal can be used to increase contributed income, the department will have even more clout. The two advanced scores, along with the favorable rating for using data, combine to overcome the department's rocky beginnings. Overall, Theatre D's education department has a healthy score of fifteen.

Table 4. Theatre D Analysis

Indicator	Descriptor	Level	Numerical Value
Foundation	Program	Emergent	2
Education Director	Connective	Advanced	4
Contributed Income	Follower	Emergent	2
Earned Income	Responsibility	Advanced	4
Data for Future	Leverage	Favorable	3
		Total:	15

Theatre E

The fifth and final education department has the highest overall score of the participating theatres. This department was given the maximum value for three indicators, that of a connective education director, the ability to responsibly earn income, and the use of data to stabilize the future. The education director spoke about connecting with other departments; "Working with development and marketing raises all boats. It takes time and trust. You have to hear what they need and complement their work. Being siloed and territorial doesn't work. It might be ok for a short period of time, but the longevity isn't there." This shows that the director is willing and able to work with the entire organization and recognizes that the education department alone cannot handle all of the work. The education director also works to ensure that the appropriate programs are bringing in earned income. At the same time, this is not allowed to interfere with the quality or the integrity of the program. The director says, "I don't make decisions about our programs based on revenue. I might generate strategies to get more money, but that doesn't change the program." The director is clearly thinking about the ability of the programs to not only serve today's community, but tomorrow's as well. To ensure that the organization shares this view, the director is able to use accurate measures and data collection to show the department's impact and work. Each program undergoes a rigorous cost analysis procedure and the director works to make sure the program is being run as effectively as possible. Although many of the education programs do not pay for themselves, the director illustrates how the program is being utilized to its full potential. This concentration on best business practices helps the organization trust the education department's decisions on programming and use of resources.

Theatre E's education department could improve on its ability to initiate contributed income. Although the education director made it clear that any requests by the development department to give tours or spend time with donors is met, there was little evidence that the education department fosters those relationships on its own. For this reason, the contributed income indicator is ranked as emergent. Finally, the department was founded as a part of the organization's mission, a "favorable" situation that can only help the department remain relevant. Overall, Theatre E holds a great relationship with its parent theatre organization, and only a few slight adjustments to the contributed income process would help keep it an integral part of the Theatre far into the future.

Table 5. Theatre E Analysis

Indicator	Descriptor	Level	Numerical Value
Foundation	Mission	Favorable	3
Education Director	Connective	Advanced	4
Contributed Income	Follower	Emergent	2
Earned Income	Responsibility	Advanced	4
Data for Future	Leverage	Advanced	4
		Total:	17

Comparative Analysis

Looking at each individual theatre gives valuable insight into what a department is doing well, along with what could be adjusted to maximize a department's potential. Education directors can use the analysis to take inventory of their actions and formulate a plan for improvement. While the small number of theatres used for this study precludes drawing conclusions about the entire field, comparisons among the theatres do reveal some tendencies.

Table 6. Indicator Levels

	Foundation	Education Director	Contributed Income	Earned Income	Data for Future
Theatre A	Basic	Emergent	Basic	Basic	Emergent
Theatre B	Emergent	Basic	Basic	Emergent	Favorable
Theatre C	Advanced	Emergent	Favorable	Basic	Basic
Theatre D	Emergent	Advanced	Emergent	Advanced	Favorable
Theatre E	Favorable	Advanced	Emergent	Advanced	Advanced

No indicator has high ratings for all five theatres. This suggests that the indicators are not simply handed to the departments, but are a result of focused energy and hard work. In contrast, initiating contributed income has a lower ranking for all but one of the theatres and the education departments all have room for improvement in that area. However, when compared with the department's budget, the ratings do not necessarily correlate with the amount of contributed income expected. This could be a result of an effective development department that cares about its educational programming. Hopefully this will always be the case, but a well-prepared education department keeps donors in close contact in case has to development shift its focus to another program. For this reason, the indicator level is not related to the ability of the development department to do its job but rather to the extent the education department is involved in the process.

The five theatres seem to fall into two groups, with one outlier. Theatre A and Theatre B have only basic and emerging rankings while Theatre D and Theatre E keep a majority of their indicators at the favorable and advanced level. Theatre C, however, has at least one of every ranking. These relationships are illustrated in the figures below. Figure 7 shows the numerical values of both Theatres A and B, while Figure 8 reveals values for Theatres D and E and Figure 9 displays the data for Theatre C. The groupings correlate with the organizational age and budget size. Theatres A and B are both younger and smaller than Theatres D and E. The congruency between company age, size, and the inter-organizational value placed on the education department suggests that as a theatre ages, its education department becomes more professionalized.

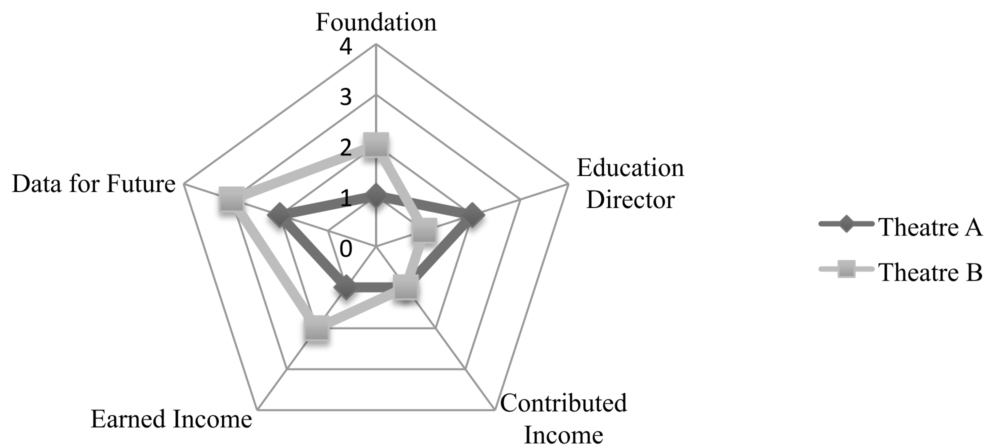

Figure 7. Indicators for Theatre A and Theatre B

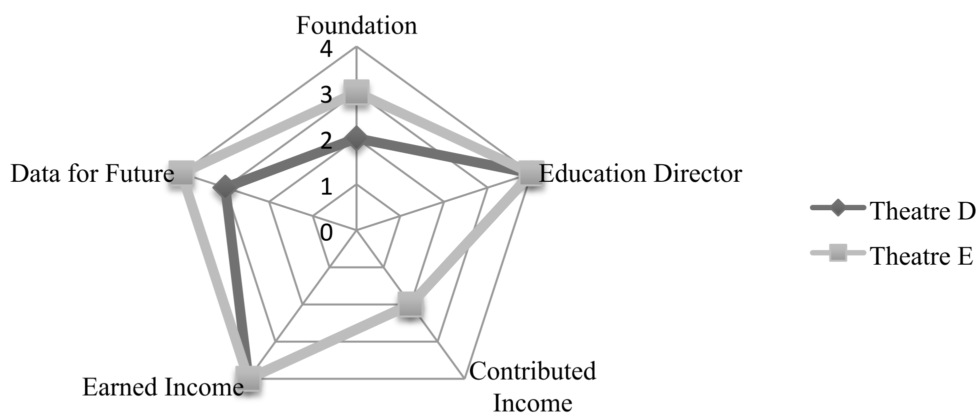

Figure 8. Indicators for Theatre D and Theatre E

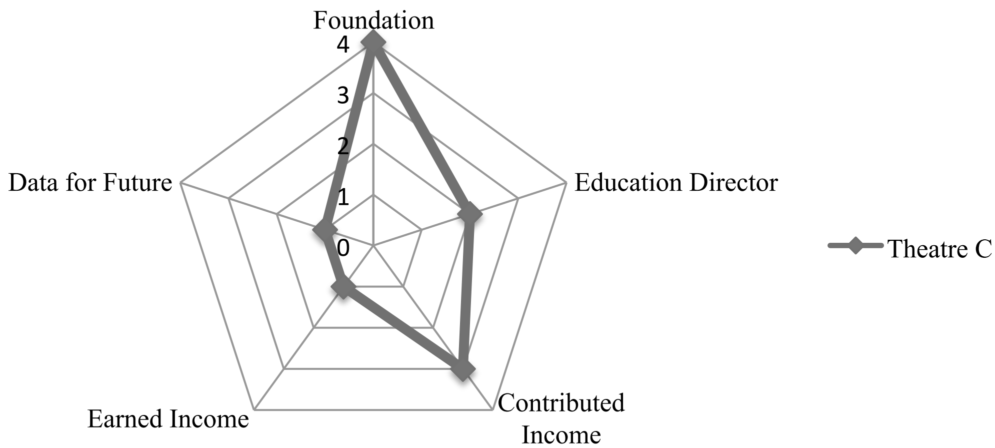

Figure 9. Indicators for Theatre C

In general, the age and size of a theatre predicts the experience of the education director. It makes sense that an older organization with a larger budget has the ability to hire a better-qualified staff. As many of the indicators are qualities of any well-run entity, the more experienced the education director, the higher the indicators fall in the rating scale. More specifically, connectivity of the education directors, a derivative of their experience, is loosely related to the ability of the programming to bring in earned income. These indicators never differ by more than one rating level. Finally, Theatre C's anomaly would be better explained with a closer look at the organization's mission and history. However this would reveal the organization's identity so it is not discussed in this study. It is useful to note however, that in this case the indicators do reflect the focus and business practices of the organization as a whole.

Little can be deduced about the field from such a small sample size, but the emergence of patterns and indications within the data produce reasons for further study. Additionally, throughout the interviewing process, a few common struggles for education directors arose. These issues, along with opportunities for improvement, are discussed in the next chapter.

CHAPTER 7

PROBLEMS AND OPPORTUNITIES

This research originally began with a more concentrated look at the third and fourth indicators, that of the education department's ability to bring in contributed income and to earn money from its programs. The original thought was that if education directors could improve their abilities to pay for their programs, they would be better supported and would feel more secure within the theatre. The study expanded, however, when it became apparent that this financial data was not available. All of the theatres proved willing to share the information, but most of them were either unable or went through extreme trouble to produce the basic numbers. All but one of the theatres had to ask their development department for help, as no one in the education department had access to all of the information. This is troubling considering the fundamental numbers being sought, numbers as simple as the department's total contributed income, earned income, and expenses. A sample financial data sheet can be found in Appendix B for further reference about the types of data the departments were asked to produce.

If a department does not maintain basic financial records, there is nothing to refer to when evaluating program effectiveness and planning for the future. It is not enough for the information to be housed in a different department, but it should be readily available to the education staff at all times. It is the education director's responsibility to ensure income goals and expense limits are adhered to, and it would be hard to do so effectively without having the financial data near at hand. Without the knowledge to back up their statements, education directors do not have as much authority to advocate for their programs. Keeping financial information handy is good business practice, and if the education directors do not work to reach better systems, their programs will consistently be considered a low priority in the organization.

Once education directors begin to engage more with their financial data, they will be able to examine how the numbers are put together. Some of the education directors in this study do not know what goes into creating the budget numbers. This knowledge could be used to make small adjustments to ensure that the education programs are well represented within the budget. One of the biggest concerns is the inclusion of overhead costs in the program budgets. This is expected, and usually a part of best practice, but the education director must be able to explain what went into figuring out the numbers. Splitting an employee's salary among different programs according to the time spent on each program is a practice used by most of the theatres interviewed. However, only two education directors spoke of reaching those percentages themselves. The apparent sustainability of a program on paper alters drastically as these salaries are adjusted, and the education director should work to present an honest and detailed picture of each program.

Dividing up staff salaries among programs within one department is difficult, but the recording of salaries from other departments is a much larger issue. Almost every theatre has marketing or development staff that spends some of their time on educational programming and this work should be conveyed in the project budget. The education director needs to ensure however, that the percentages accurately reflect the time spent on education projects. Some education directors might worry that including additional expenses will hurt already troublesome income/expense ratios, but initiating this good business practice will not only provide a reliable budget, but will help the education team earn respect from other departments.

Some of the most common missteps among these education departments were the budget decisions about internships and/or fellowships. Many theatres have programs where students or young professionals work with a department for an extended period of time to gain experience.

Sometimes these students receive payment and sometimes the knowledge gained serves as compensation. Whether the budget line includes stipends or just administrative expenses, most of the internship programs are displayed entirely in the education department's budget. However, usually the education department only receives one or two of these interns. Even though many departments get the benefit of cheap labor, only the education departments have to deal with the expenses that come with it. One program's entire education budget moved from having a deficit to a surplus with this small adjustment. This illustrates how a line item could impact the entire document to such a degree as to positively alter perceptions about the ability of the education department to contribute to the organization financially.

Another common practice that hurts the education department's budget is the manipulation of student ticket donations. Many foundations enjoy sponsoring schools, especially those with low-income students, by paying admission for student matinees. The price tag of this practice can be exhibited in many different ways, and theatres are using many variations. The most extreme theatres take the full admission price of every seat to create the expense line. Others are slightly more lenient and use a discounted rate for the tickets. The most popular method for education departments is to calculate the actual cost of putting on that single performance. Generally, this is much cheaper than the first two options. If a mainstage production, with all of its rehearsals and designs, is already being performed for the general public, how much more does one school matinee actually cost? This variation in the recording of expenses could drastically alter the total expense of an education department.

For at least one of the organizations interviewed, the education department's combined contributed and earned income exceeds its expenses. Three education directors explicitly state that education departments cannot pay for themselves, but one theatre is doing just that. Another education department is quite close to supporting itself financially. By definition, nonprofit arts organizations are not expected to make money, but they can only survive if their contributed and earned income exceed their expenses. It seems reasonable that education departments should be expected to do the same. If some of the reasoning behind foundational giving to a theatre could be more closely monitored, it is highly likely that the presence of educational programming was an important factor in the decision to donate. If education directors monitored contributed income more closely, as suggested by the third indicator, such an analysis could take place.

If an education department is able to bring all of its indicators to the advanced level, it is highly likely that the programming would flourish in a safe and supportive environment. This might not always be the case, however, as some education directors are faced with an organization that will not engage with the idea that education departments are valuable aspects of a nonprofit theatre. Most managing directors who ignore the value are blinded by the price. If this is the case, education directors must begin to expand their circle of influence and work to make relationships with people outside of the organization. By corresponding regularly to foundations or high-level donors, directors can build valuable allies for their department. According to Daniel Renner, it would also be useful to identify and win over a few board members as well (Renner 2012). This networking cannot be seen as a sort of coup d'état but instead, as a way to bring more awareness to the department, and by association, to the organization. Education directors must remember that their executive directors are the ultimate key to the security and longevity of educational programs. This relationship is the most important of all.

CHAPTER 8

SUMMARY AND CONCLUSION

This study uses interviews, financial documents, and public materials to study the relationship between five midsize nonprofit theatres and their education departments. After analyzing commonalities, this research identified five indicators that revealed the nature of the relationship between the education department and the rest of the organization. Each indicator exhibited characteristics that depicted the productiveness of the relationship between the department and the larger theatre organization. The first indicator was the reason behind the education department's foundation and was divided into four motivations: asking for certain grant funds, stemming from a specific program, following the mission of the organization, or utilizing the value proposition of the organization. The second indicator was the ability of the education director to connect with other departments within the organization and included either a department centric attitude or one of connectivity with other departments. The third indicator was the capability of the education department to find and foster contributions either as a following entity of the development department or as a task initiated by the education department. The fourth indicator detailed the capacity of the educational programs to earn an income, which was either a low priority of the department or seen as one of their responsibilities to sustain programming. The final indicator was the use of data to link the education department with the future of the organization, which was either completed at an internal level or used as leverage within the organization as a whole.

Next, these indicators were used to analyze each of the five theatres involved in the study and to provide recommendations for improving the relationships between the education departments and their theatre organizations. Finally, by comparing the five theatres, this research created a framework for assessing education departments in the field of educational theatre.

Education directors in nonprofit theatre organizations will hopefully use this study to raise the value of their departments. If education directors work to improve their ratings on the five indicators, the research suggests that the ability of the departments to advocate within theatre organizations will increase as well. Internal advocacy is suggested as a way to improve the education department's quality and longevity. As noted in earlier research, "sustained student involvement in theatre arts associates with a variety of developments for youth [including]: gains in reading proficiency, gains in self-concept and motivation, and higher levels of empathy and tolerance of others" (Catterall, Chapleau and Iswanaga 1999, 2). Thus, theatre education departments are vital resources for a community, and should not be lost.

Recommendations for Future Research

At the most basic level, this study could be continued with multiple theatres of different budget levels, locations, and experience levels. Findings drawn from a more expansive data set would be more conclusive about the field as a whole. Then, the indicators could be analyzed according to more detailed aspects of an organization. For example, how does the ability of an education director to initiate contributed income change in different geographic locations? How does budget size affect the connectivity of an education director? Findings from this type of research could better aid education director's focus on information about theatres with similar traits to their own. Additionally, it would be valuable to add weights to the five indicators proposed in this study, according to which indicators the department believes are most beneficial. This could help departments better compare themselves according to the factors that they value the most.

The flow of money into and out of an education department is one of the most important indicators of a department's longevity. However, it is quite challenging to compare the financial health of departments when each one goes about the budgetary process in a different way. To produce the best results, a researcher would need access to detailed program budgets and a common method to calculate totals. Most departments want to respect the privacy of their employees so getting such specific information, including salaries and staff time spent on each project, would be difficult. The only way to compare these numbers, however, would be to have compatible systems of deciphering them. If education departments are able to see the value of a study meant to increase their influence within the organization, perhaps they could work more closely to present these materials and provide a way to advocate together.

APPENDIX A

INTERVIEW QUESTIONS

Following are the questions asked during interviews with the education directors. These served as the basis of conversation.

1. Why does your organization have an education department?
2. What is the mission or purpose of your education department?
3. What kinds of data do you use to elevate your education programs *within* the organization?
4. Describe your relationship with other departments in the organization.
5. Do you feel driven to generate income from your programs? Which programs are able to earn significant income?
6. Can you identify past grants or large donations your organization received because of the education department or education programs? Do you think this is recognized by the organization?
7. Based on money given to education, how much do you see? Do your programs receive restricted grants?
8. Describe your budgeting process. What types of education programs have the greatest expenses?
9. What kinds of data do you gather to assess your programming? How do you use this information to make future decisions?
10. How do you align your programs with the future of the organization?

APPENDIX B

EXAMPLE SURVEY

THEATER NUMBER: _______________

Section I: Staff

List the number of staff members for your organization and your education department.

	FY12	FY11	FY10	FY09	FY08
Total Employees					
Full Time					
Part Time					
Interns					
Education Employees					
Full Time					
Part Time (Including TAs)					
Interns					

Section II: Names and Longevity of Educational Programming

Please write the year each of your programs began.

If applicable, please write the name(s) of any education programs that were suspended over the last five years and why.

Section III: Revenue and Expense

Please use your approved operational budget to fill in the below information.

Total Organization Revenue

	FY12	FY11	FY10	FY09	FY08
Total Revenue					
Total Earned					
Total Contributed					

Total Organization Expenses

	FY12	FY11	FY10	FY09	FY08
Total Expenses					
Program Expenses					

Education Department

Please fill in the revenue and expenses for your education department over the last five years.

	FY12	**FY11**	**FY10**	**FY09**	**FY08**
Total Revenue					
Total Earned					
Total Contributed					
Total Restricted					
Total Expenses					

Please fill in the revenue and expenses for the chosen education programs over the last five years.

Program #1

	FY12	**FY11**	**FY10**	**FY09**	**FY08**
Total Revenue					
Total Earned					
Total Contributed					
Total Restricted					
Total Expenses					

Program #2

	FY12	FY11	FY10	FY09	FY08
Total Revenue					
Total Earned					
Total Contributed					
Total Restricted					
Total Expenses					

Program #3

	FY12	FY11	FY10	FY09	FY08
Total Revenue					
Total Earned					
Total Contributed					
Total Restricted					
Total Expenses					

Please list the foundations or corporations that give your department the most restricted funding.

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